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Equity Learning Lab: Summative Evaluation Report

Kathleen Feeney, Divya Vohra,
Becca Gordon, and Clement Boaheng

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Acknowledgments

Mathematica has committed to working with partners to build a more equitable and just world where evidence drives decisions for global impact. The opportunity to explore, understand, and synthesize the journey of the Equity Learning Lab has given our team a unique window into an unprecedented effort to develop the capacity of health nonprofits to tackle the challenge of building racial equity into their internal and external operations. It is our privilege to offer insight into this work to a broader audience.

This report benefitted from the input of many voices. The authors thank the ELL Hub team, Learning for Action and Public Equity Group, for their collaborative partnership and sharing their experiences, knowledge, and perspectives about the design and implementation of the Equity Learning Lab. We greatly benefitted from witnessing the community they built and the values they upheld in every interaction.

We offer our deep appreciation for the input of Plan and Content Coaches, Equity Learning Lab advisory team members, and funded partner teams for sharing stories and lessons with us about their experiences participating in the Equity Learning Lab. We are honored to hold your stories in our hearts and hope we have done justice to the lessons you shared with us over the last year.

We also extend our sincere thanks to Emmanuel Saint-Phard, So O'Neil, Frank Martin, and Jennifer Blum for their contributions to this meaningful work throughout the contract's lifecycle; Leah Hackleman-Good, who provided editorial support for this report; and Sheena Flowers, who led the report's production.

The work of building a more equitable and just world takes tremendous commitment and courage. Our team has learned so much from the opportunity to observe leaders in the effort to foster equitable organizations and communities and from the invitation to infuse the values of the ELL into our evaluation and learning approach, which has strengthened our own dedication to carrying these lessons forward. We hope this report inspires others to take on this imperative challenge and encourages each of us to remain steadfast on our journeys forward.

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Key Terms and Acronyms

The Hub team	The team of individuals from Learning for Action and Public Equity Group who co-designed and administered the Equity Learning Lab
Funded partners	Participating organizations funded by Robert Wood Johnson Foundation's Transforming Health and Health Care Systems portfolio
ECP	Equity Continuum Plan
EDI	equity, diversity, and inclusion
ELL	Equity Learning Lab
ELLAT	Equity Learning Lab Advisory Team
OERT	Organizational Equity Reflection Tool
RWJF	Robert Wood Johnson Foundation
THHCS	Transforming Health and Health Care Systems




Executive Summary

In 2020, the Robert Wood Johnson Foundation (RWJF) awarded a grant to Learning for Action (LFA) and Public Equity Group (PEG) to design and implement the Equity Learning Lab (ELL), a three-year capacity-building effort that supported RWJF's Transforming Health and Health Care Systems (THHCS) funded partners to embed equity into their organizational practices and strategies. After a six-month design and development period, LFA and PEG (collectively known as "the Hub team") launched the ELL in fall 2020 with 38 funded partners.

This report describes the experiences of the organizations that implemented and participated in the ELL. We describe the kinds of progress that participating organizations and staff made in their equity journeys, the factors that facilitated or prevented their progress, the features of the ELL that supported them, and the plans they have to continue this work. Finally, we reflect on the stories and takeaways shared to elevate lessons and recommendations for the broader field about promoting and building capacity for organizational equity.

Progress made during the ELL. Funded partners that participated in the ELL made progress in a wide range of areas, including shifting power structures to better align with equity goals; incorporating equity into strategic planning; and embedding equity and principles of equity, diversity, and inclusion (EDI) into hiring, staff professional development, and decision making around organizational structure. ELL participants also made progress on their personal equity journeys by learning to engage in difficult conversations, recognizing how their own positionality shaped their perspectives and their approach to their work, and reflecting on their role in bringing about organizational change.

ELL's customized support and learning. The ELL provided four main components: (1) reflection and planning tools, (2) an online curriculum and resource bank, (3) a learning community, and (4) customized coaching. Funded partners engaged with each of the four main components of the ELL in varied ways. Organizations that took advantage of the customized coaching found it to be the most valuable component of the ELL because of the accountability and tailored support it provided. The learning communities, equity-focused tools, and curriculum and resource bank were also valuable components of the ELL, but some funded partners noted that because they were less customized to individual organizations' needs, they were not always as helpful as the coaching. However, the sense of community fostered by all components of the ELL, especially the learning community, was seen as a major benefit to ELL participation.




Looking ahead. Most funded partners that participated in the ELL are eager to continue their progress beyond the program and are identifying important and effective ways to sustain their equity work, including by embedding principles of equity into their strategic plans and organizational goals. In order to sustain this work, organizations will need dedicated resources, including funding and time set aside for this work; buy-in and commitment from leaders and decision makers in their organizations; support for staff to continue to engage in challenging topics; and a clear, consistent vision for their equity work that can motivate and guide staff even as immediate needs and priorities shift.

Factors that shaped success. Funded partners appreciated the ELL’s cohort model and found that the sense of community it engendered was helpful, motivating, and productive. Other factors that promoted success included having buy-in for equity work from those in organizational positions of power, staff willingness to have difficult conversations about equity, having started some equity-related work prior to joining the ELL, and consensus around equity-related goals. Factors that inhibited progress included limited time, money, and resources for equity work; a lack of clear commitment or direction from organizational leaders; staff turnover; and the sometimes limited ability of the ELL to respond to highly specific and emergent organizational needs. The Hub team’s approach to implementing the ELL, which infused the ELL’s guiding principles into its internal systems and processes, played an important role in shaping funded partners’ experiences and contributed to their positive impressions of the ELL.

Lessons for the field. We identified the following overarching lessons that can inform future efforts to support organizational equity work.

- Key components of the ELL helped embed seeds of transformation in participating organizations and their staff.
 - The most valuable supports that participating organizations received were the components that were most tailored to individual organizations’ needs.
 - Personalized coaching is transformative when the match between coach and organization is strong.
 - The cohort model fostered a valuable sense of community overall. By design, some components of the ELL were less tailored to individual organizations to ensure a common foundation, and some participants perceived these as less directly applicable to their equity journeys.
- Organizations need time, resources, and the sustained commitment of their staff to nurture their budding equity work; the ELL should not be perceived as the end of participants’ personal and organizational equity journey.
 - The work of addressing racial and other forms of intersectional equity is imperative for all organizations to begin or continue, regardless of their starting point. Cohort-based initiatives to support organizational equity could potentially benefit from grouping organizations according to where they are on their journey.

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- Organizations must be thoughtful about who is taking on the burden of addressing equity; White leaders and staff also need to assume responsibility for racial equity work, alongside staff of color.
 - Executive leaders must champion both internal and external equity-focused efforts—and be honest with themselves about their positionality, the power they hold, and the progress they are making.
 - It is the responsibility of individual staff to reflect on the ways in which their identities and organizational roles can intersect to produce privilege and power.
 - Funders should support equity-focused capacity-building work, both to provide organizations with resources for these efforts and to signal the depth of their commitment to creating a more equitable world.
 - Community impacts resulting from this effort will take time to emerge—but those impacts could be transformative.
 - Equity work is an ongoing journey: there is no destination or point of arrival. This journey can be challenging and uncomfortable, slow and circuitous—but if ELL participants stay committed, they are on track to generate transformative change.
 - Individuals and organizations working to advance health equity want to do hard things. Their commitment and tenacity will be needed in the years to come to show how their individual and organizational transformations can yield meaningful changes for their communities.

Introduction

Brief history of the ELL

In 2020, the COVID-19 pandemic disrupted nearly every facet of life in the United States. In May of that year, the murder of George Floyd catalyzed and amplified the movement for racial justice. In response to these events, many of the Robert Wood Johnson Foundation's (RWJF's) funded partners began to request support and resources for more directly engaging with issues of racial equity and for embedding equity into their organizational practices. RWJF awarded a grant to Learning for Action (LFA) and Public Equity Group (PEG) to design and implement the Equity Learning Lab (ELL), a three-year capacity-building effort to support RWJF's Transforming Health and Health Care Systems' (THHCS) funded partners in these efforts, with a focus on embedding racial equity into their organizational practices and strategies. After a six-month design and development period, LFA and PEG (collectively known as "the Hub team") launched the ELL in winter 2021 with 38 funded partners. The work occurred in two phases (as shown in Exhibit 1 below): Phase 1 was from January 2021 to June 2022, and Phase 2 continued from July 2022 to December 2023. The Hub team contracted with Mathematica to conduct a third-party evaluation of the ELL.

Exhibit 1. Timeline of ELL phases



The ELL's purpose and goals

The ELL sought to provide structure on a supported journey to accelerate the uptake of best practices, processes, and organizational policies that advance equity, diversity, and inclusion (EDI).¹ In addition, the ELL was intended to support participating organizations to aim high for results within their organizational culture and systems as well as programmatic strategies. The ELL's emphasis on racial equity in particular arose from the recognition that racial disparities exist for nearly every indicator of health and well-being and the root cause

¹ Early in the development phase, the Hub team made a conscious decision to change the name from the EDI Learning Lab to the Equity Learning Lab. The team wanted to lead with the desired outcome of equity; diversity and inclusion are pathways for achieving equity.

of these disparities is deep-seated and long-standing structural racism. Organizations that seek to eliminate those disparities, like RWJF's funded partners, must be equipped to identify and combat structural racism and promote racial equity.

The ELL's designers hypothesized that there is value in aligning an organization's internal operations and strategy with its externally stated (equity-focused) mission and goals; in other words, organizations that dedicate themselves to meaningfully embedding equity into their strategies, practices, and internal structures ultimately become more effective at transforming health care systems and generating more racially equitable health outcomes. The designers further believed that this kind of organizational transformation requires both individual and organization-level change. Shifts in individual staff members' beliefs, values, assumptions, and personal practices regarding equity, as well as changes in their own capacity to transform their organizational culture, are just as critical as shifts in strategy and organizational policies and practices.

With these overarching goals in mind, the Hub team designed the ELL to accelerate organizations' progress toward equity to ultimately support their ability to achieve equitable health outcomes. Specifically, for organizations participating in the ELL, its designers sought to ensure that organizational goals, intended impacts, program strategies, and resources are explicitly designed to advance racially equitable health outcomes (**embedding equity in strategy**); that research, evaluation, and learning support internal organizational improvement, external strategies, and organizational accountability to racially equitable health outcomes (**embedding equity in evaluation and learning**); and that 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 (**embedding equity in organizational development**).

Core values guiding the ELL

The ELL's design was grounded in four core values:

- **Equity.** 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). Engaging in deep racial and intersectional equity work means “working toward outcomes in ways that model dignity, justice, and love without recreating harm in our structures, strategies, and working relationships.”
- **Journey of learning and growth.** ELL recognizes that all people are on their own racial equity journeys, learning, growing, and evolving at their own pace—individually, organizationally, and collectively. The ELL is an opportunity for participants to learn together via capacity building that supports leaders and organizations to advance racial equity and justice.
- **Collaboration.** ELL is anchored in a spirit of collaboration that acknowledges that all partners are in learning mode and that each person is starting from their own place; none of us is an “expert” or has all the answers. The ELL provides an opportunity for multidirectional dialogue and collaborative work to embed equity both in what organizations do and how they do it so that they can increase their capacity to make progress toward health equity.
- **Choice.** 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, the ELL is committed to creating multiple entry and engagement points for participants and works closely alongside the coaches and funded partners to offer many different opportunities.

Source: LFA and PEG. “Overview of the RWJF Equity Learning Lab.” 2024.

Design of the ELL

Over the six-month development period, the Hub team relied on existing research and evidence for how organizations and individuals effectively change. Each organization team within the Hub also brought unique and complementary expertise that informed program development. LFA brought extensive experience in designing and implementing capacity-building initiatives that are foundation sponsored and cohort based. PEG brought deep experience leading organizational equity work and capacity building. Exhibit 2 summarizes the Hub team’s key takeaways from the research and evidence base about how change happens.

Exhibit 2. Key Takeaways from the Research Base Underlying the Design of the ELL



Source: “Theory of Change for the RWJF Equity Learning Lab.” LFA and PEG, 2023.

The design of the ELL included the following key features and components.

Cohorts. 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.

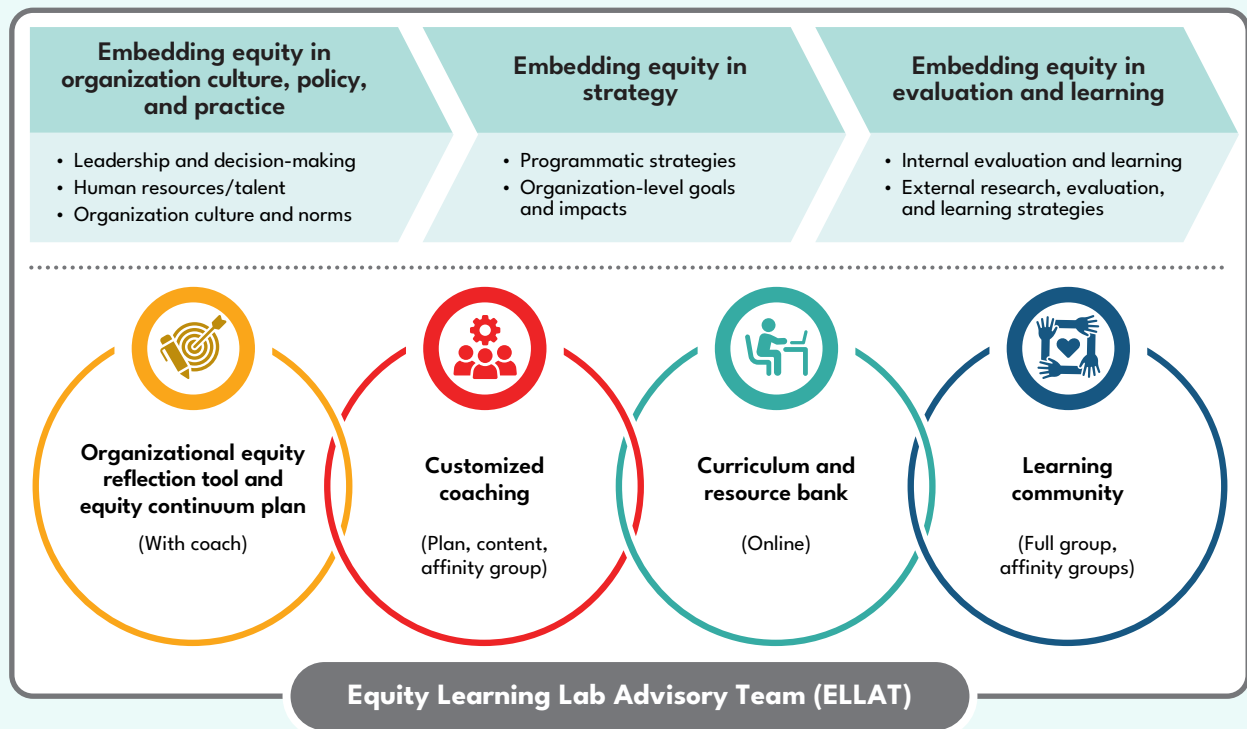
Tiers of participation. The ELL offered two tiers of participation: (1) self-guided and (2) intensive and coach supported. At the start of the initiative, funded partners were given the choice to go at their own pace (Tier 1) or receive coaching (Tier 2): 34 of the 38 funded partners chose to participate in the more intensive tier of the ELL, though four transitioned to Tier 1 in June 2021 because of capacity constraints.

The ELL was designed to concentrate capacity-building efforts in the following three areas of focus (depicted in the top bar of Exhibit 3), which are aligned with the ELL’s goals for participating organizations’ growth:

- **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 could 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 have been found to be 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.
- **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.

Ongoing participant advisory engagement. Early in the implementation of the ELL, the Hub team recruited and engaged a team of funded partner representatives to serve as ongoing advisors, called the Equity Learning Lab Advisory Team (ELLAT; depicted in the bottom bar of Exhibit 3). The Hub team put out a request for self-nominations from funded partners and sought to convene a diverse group to represent participating funded partners, aiming for a diversity of perspectives in terms of organizational size, topical areas of focus, and the populations and communities served by funded partners. Participating ELLAT members received a stipend of \$4,000 for each 18-month phase of engagement. A small number of ELLAT members participated in both Phases 1 and 2, which provided some continuity of perspective and experience. From the start of their engagement, the ELLAT team members advocated to meet monthly (rather than less frequently) in order to contribute most meaningfully and feel most deeply connected to the effort. This team provided input on topics such as the content of group learning activities, made suggestions for ELL implementation improvements, and supported making meaning of the learnings throughout the implementation process. The frequent and meaningful engagement of the ELLAT supported the Hub team to continue to iterate and improve upon the implementation of the ELL and the content delivered.

Exhibit 3. Equity Learning Lab four primary program components and three areas of focus




Program components

The ELL offered an opportunity for funded partners to strengthen their equity-related efforts using four primary program components, depicted as the four central circles in Exhibit 3. The program components served as vehicles to learn, develop, and progress on plans to improve the extent to which equity is embedded within their internal and external work.

Reflection and planning tools. All funded partner teams had access to the Organizational Equity Reflection Tool (OERT) and the Equity Continuum Plan (ECP), which were tools developed by the Hub team to help funded partners (1) assess the extent to which equity was already present in their work, organizational structures, and practices and (2) set clear goals around how they wanted to advance in embedding equity.

Online curriculum and resource bank. Funded partners also had access to the online learning curriculum and resource bank, which consisted of seven modules containing curated articles and other reading materials to support all participating funded partners in their organizational and personal equity journeys. The first component of the curriculum was a set of four self-guided learning modules that included a selection of recommended core resources, additional resources for a deeper dive on the subtopic, and reflection questions in four areas:

1. Foundational learning—structural racism and health equity
2. Making space for conversations on equity and race
3. Supporting personal reflection and growth
4. Leading organizational change



The second component of the curriculum was a resource bank of three additional modules with a collection of practical tools and resources for embedding racial equity in the three areas of focus: (1) strategy, (2) evaluation and learning, and (3) organizational development.

Learning community. All ELL participants could also access all-group learning forums and affinity groups: a key design focus of the ELL was to foster community through multimodal learning opportunities. All-group learning sessions were held three times a year and focused on providing opportunities for peer learning and community building. Guest speakers often led early sessions, which included time for breakout group discussions. In the final year, the ELL moved toward a Peer Learning Circle (PLC) model that provided space for participants to join conversations around six topics:

1. Sharing power with communities
2. Sharing authority in making organizational decisions
3. Cultivating formal leadership buy-in
4. Driving change as Black, Indigenous, and people of color (BIPOC) team members in organizational equity work (for BIPOC team members only)
5. Developing a shared internal narrative about their organizational equity journey
6. Embedding equity in research, evaluation, and policy work

Additionally, the Hub team established optional affinity groups that focused on supporting individuals' personal growth and journeys. Five groups were launched at the start of the ELL: (1) White Women and the Power Paradox; (2) Black Women and Femmes Care Circle; (3) Human Resources and Inequity; (4) Mid-level staff (all races); and (5) Black, Indigenous, and People of Color emerging leaders. In Phase I, affinity groups were held in a series of six sessions (three in August through December 2021, three in January through June 2022) in total every six to eight weeks, with five to 10 participants. Based on the value of the series for participants, alongside challenges participants experienced with attendance, the Hub team modified the frequency of the series in Phase 2 to three sessions in three-month cycles.

Customized plan and content coaching. The final component distinguished itself from the self-guided pathway through the ELL: funded partner teams could receive Plan Coaching to support teams in setting and taking steps toward equity goals. This included facilitating in the OERT process and providing tailored guidance on achieving goals established in the ECP. Plan Coaches brought expertise and lived experiences—including personal and professional—helping organizations advance equity, usually with a specific area of focus (strategy, evaluation and learning, or organizational development). Most funded partners elected to engage with a Plan Coach. Funded partner teams in the coaching tier also had access to Content Coaching, which provided specialized guidance on a specific content area at the funded partner team's request. For example, one content area was how to support embedding equity principles in human resources policies or organizational culture.

Evaluation methods

For this summative evaluation of the ELL, the Hub team, RWJF, funded partners, and other core constituents were interested in learning whether and how the ELL achieved its goals, how funded partners progressed through their equity journeys, and to what extent (and how) the ELL's supports aided in those journeys. They

also were interested in summarizing lessons learned that might support the sustainability of ongoing equity efforts and inform the fields of philanthropy, health equity, and beyond about how to design and implement future capacity supports for organizational equity work. To respond to the information needs and determine questions of interest, the Hub team conducted a set of stakeholder meetings. These meetings included representatives from RWJF, ELLAT, Plan Coaches, Hub team leadership, and Mathematica. During this series, participants identified potential learning questions. Among the questions of interest, participants prioritized the following ones for the summative evaluation:

1. **Progress made during the ELL:** What did equity progress look like for funded partners?
2. **ELL's customized support and learning:** How did components of the ELL help funded partners advance their equity work?
3. **Looking ahead:** How do funded partners plan to continue their equity work beyond the ELL?

The Mathematica team used qualitative data collection and content analysis methods to address the questions of interest and surface stories about funded partners' journeys and outcomes. We reviewed key notes and documents from the Hub team, Plan Coaches, and individual funded partners, including notes from meetings and all-group learning forums, funded partners' OERTs, ECPs, and reflection documents (called the Equity Learning Reflection Kits). We also conducted interviews with individual funded partners, Plan and Content Coaches, and Hub team members.

We used a thematic coding approach to identify emergent themes in the data and surface responses to the learning questions.

Over the course of this evaluation, Mathematica and ELL Hub team members sought to challenge evaluation orthodoxies and to align evaluation goals and methods with the overarching vision and goals of the ELL. The overall approach to this work was therefore collaborative, emergent, and learning oriented. We emphasized listening to and learning from ELL participants with humility, co-interpreting findings and data with ELL partners when possible, and focusing on facilitating learning rather than measuring progress toward prespecified outcomes.

For example, given the key role that internal power dynamics play in organizations' equity work, the Mathematica team carefully considered the positionality of ELL program participants and interview respondents, and we conducted occasional follow-up interviews with individual staff members in cases where we believed that power dynamics were shaping responses in group interviews. In addition, although the ELL had articulated clear goals and indicators of success, this evaluation does not focus on evaluating organizations' progress toward those specific indicators, in part because we recognized that some of these indicators were likely not achievable in the short lifespan of the ELL. Instead, this report discusses the broader experience of organizations and individuals participating in the ELL, the areas in which they did make progress (regardless of whether or how these aligned with the ELL's stated indicators of interest), and the lessons they learned about doing equity-centered work.

Data sources

- Interviews with funded partner teams
- Interviews with selected Hub team and ELLAT members
- Interviews with Plan Coaches and selected Content Coaches
- Group convening notes
- Organization Equity Reflection Tools (OERT)
- Equity Continuum Plans (ECP)
- Plan Coach Indicator Map
- Equity Learning Reflection Kits
- Participant Questionnaire analysis
- Plan Coaches' notes



ELL Progress and Outcomes: Partners Embraced the Necessary Work to Support Equity

This section summarizes the progress and outcomes funded partners worked toward during the three-year ELL period as well as reflections that individual participants shared about their personal growth.

Although the Hub team focused much of the content and design of the ELL specifically on racial equity, it was clear by the conclusion of the ELL that interviewed staff at funded partners had begun to transfer knowledge about racial equity into other intersectional aspects of equity work. Therefore, themes on progress summarized below discuss issues of equity or EDI broadly because this was the way which most interviewed staff talked about their work in retrospect.

Organizational equity journeys

Most funded partners progressed in their organizational equity goals in a number of ways through their participation in the ELL. Key areas of progress included the following:

Within strategy

Building accountability into strategic goals. Some organizations created accountability structures for ensuring equity remained a priority. These structures included incorporating equity into strategic plans or adding a recurring agenda item to discuss progress on equity to quarterly meetings with the organization's board. At least one funded partner noted that their team plans to refresh their OERT annually to assess progress and align on future priorities.



The self-assessment exercise...was a really rich and powerful experience for us, which we did as a leadership team. We sharpened where we were as an organization regarding racial justice and advancing health equity...[and] as an organization we spent time defining the parameters of what [equity] was.

Funded partner

Inviting shifts in power sharing, both internally and externally. Multiple organizations established advisory structures to engage typically unheard voices in the planning and implementation of both internal and external efforts. Structures included funded partners establishing internal equity advisory committees or new staff roles to focus exclusively on equity or creating external advisory committees engaging people with lived experiences to inform and advise on future work. By inviting new perspectives and voices to inform aspects of their work, these organizations signaled a commitment to conducting research, evaluation, and learning activities in more culturally informed and relevant ways; to dismantling potentially harmful perspectives or practices; and to seeking new avenues to effect change.

Embedding equity into external programmatic priorities. One funded partner described their team getting further clarity about the external public policies and broader systems change they want their work to impact. Yet another described designing criteria that their organization now uses to determine who participates in external events such as conferences to ensure more racial and ethnic diversity.

Within evaluation and learning

Embedding equity into internal programmatic priorities. One funded partner performed internal audits or self-assessments of current work portfolios to ensure all work had a clear equity component. Others worked on reviewing and embedding equity into their data collection and evaluation practices, tools, and procedures, including finding or creating opportunities for more participatory engagement.

Within organizational development

Shifting language use. Many organizations created or revised internal definitions for EDI terms to ensure a common understanding within the organization. Some organizations also strengthened their external equity-related statements, especially updating mission and vision statements. A handful of organizations created internal communication style guides to emphasize



It feels almost like an entirely different organization. We have an equity stance on our website that was staff-developed. We have EDI terminology guides. There's been so much change and it's amazing to see and feel. We have had a lot of successes.

I've been with [this organization] for 4 years and one of the biggest changes I've seen is the [equity] conversations happening. Everyone is thinking about equity in the work they are doing and we get feedback from meetings about thinking about certain equity issues. This is a stumbling block for a lot of organizations, but this is something we do well.

Funded partner



equitable and inclusive language. One funded partner also described how it now provides invitations to and communications about external events, such as a national convening invitation, in both English and Spanish. Staff feel this change has improved participation and the overall quality of these events.

Embedding equity into organizational culture and staff development practices. Some funded partners focused on supporting current staff to grow their equity-related skills by incorporating equity into staff onboarding activities and performance reviews—and therefore into advancement criteria. Others reported identifying trainings or professional learning opportunities or facilitating consistent knowledge sharing opportunities for staff around EDI, such as book or journal review clubs. Some funded partners established a mentoring structure for staff with historically marginalized backgrounds. One mentioned making shifts in organizational culture that resulted in structures for staff to provide input and feedback to top leaders, which resulted in leaders delegating more opportunities to junior staff.

Embedding equity into hiring. Some organizations focused on strengthening hiring practices in order to minimize implicit bias during the recruitment and hiring process. Their actions included expanding how they recruit staff, including how they share information about the position with candidates; standardizing interview questions; and developing formal criteria to assess candidates. One funded partner described leadership transitions during the ELL and intentionally partnering with their coach to help them “strategically” use this transition to progress on their equity goals by refining the way they described the role in the job posting and in their new hire recruitment process.

Embedding equity into organizational structures. One organization mentioned using the ELL as an opportunity to incorporate equity principles into policies such as telecommuting policies and salary scales and structures.

Not all organizations reported making progress toward all of their goals. Staff from a handful of funded partners described challenges in allocating resources or staff time, leadership buy-in, and other embedded structures and policies that made progress difficult. One funded partner was an organization within a larger company, and certain policies and structures could not be changed within the funded partner without changes to the larger entity, which was not involved in the ELL. One staff person noted they felt they “did not have permission” to make changes. In another, nearly all members of the original ELL team left the organization during the lifecycle of the ELL, which inhibited continuity and thus progress. Another barrier that some funded partners faced was a culture of overextension and burnout due to their regular workloads, which prevented them from generating momentum to move their equity work forward. Across funded partners that did and did not feel they made much progress, all noted that making change on organizational equity progress is difficult and takes time.

At the same time, as one coach noted, it is important to bear in mind that defining “meaningful” progress in equity work can be difficult, as progress can show up in subtle or unexpected ways. This coach described an example where a funded partner had an organizational leader who is now more comfortable talking about race and equity, even though the larger organization did not make much progress toward their stated goals. Another coach reflected on how one of their funded partners evolved to take ownership of their equity journey over the three-year period. This coach noted that staff in the organization leaned heavily on them in their role as a coach at the start of the ELL, but staff became more confident and independent over time. Their confidence was especially evident toward the end of the ELL, when the funded partner team facilitated a large-scale presentation at their organization to make recommendations for future equity-related improvements.

Individual equity journeys

Overwhelmingly, individual ELL participants reported personally meaningful experiences through their equity journeys in the ELL. One individual noted that their personal evolution through the ELL was “life-changing” in the ways that the ELL supported them to make personal discoveries about themselves, understand the history and ongoing pervasiveness of racism and other structural inequities, strengthen their skills and resolve in working against those inequities, and share personal stories with and learn from other leaders also engaged in this important work.

One common theme was the opportunity to engage in difficult conversations—including about race, racial equity, and other aspects of intersectional equity—and strengthen this skill over time. Being able to identify, name, and confront inequity is critical in dismantling biased, oppressive actions and systems on both the personal and organizational levels. In particular, funded partners talked about the benefit of having a coach to help facilitate difficult conversations and support teams to create shared norms. The Hub team explicitly modeled strong practices by beginning all-group learning activities with these shared norms to support safe, respectful, and productive spaces for discussions. Staff reported that they were better able to recognize when to slow down in their own work and make the time and space to both have difficult conversations and to process the potentially challenging emotions in the “aftermath” of those conversations. Staff noted the value and power of these conversations for making personal and organizational shifts in the long term.

Another theme was the ability to explore individual positionality. Participation in affinity groups such as the White Women and the Power Paradox or the Black Women and Femmes Care Circle gave participants new perspectives on their positionality and roles within their organizations and gave them confidence to make personal changes or to challenge inequities in the workplace. Similarly, some staff noted that they were better able to connect with others’ experiences and think about issues they might encounter in their own organization or in the world. This sentiment was true even for participants who were grappling with difficult truths about themselves. One staff person noted that participating in the ELL enabled them to recognize their “personal shortcomings” around equitable practices and that they “truly, truly enjoyed this process” to help them grow in these areas. In particular, this leader noted that they hope having participated in ELL and embedding racial equity in their organization will be part of their legacy there.

Finally, funded partners shared how participating in the ELL gave them opportunities to reflect on their roles in actively creating change and strengthening equity at their organizations and beyond. One staff person reflected on how their participation in the ELL gave them the perspective to better understand what it means to be intentional with their time and to emphasize the significance of creating an inclusive and diverse organizational environment through equitable hiring and retention policies. With these perspectives, staff felt encouraged to push against the potential discomfort of doing the necessary work to support positive change.



ELL’s Customized Support and Learning: Components of the ELL Helped Funded Partners Advance Their Equity Work

Customized coaching

Most funded partners agreed that the ELL’s customized coaching was the most valuable of all components. Because of the diverse range of participating funded partners, an individualized, “bespoke” approach was what most organizations needed to make progress toward their equity goals. Plan Coaches took time at the beginning of the partnership to develop relationships and, through their facilitation of the OERT and ECP, came to have a deep understanding of the goals, values, and strengths—and opportunities for strengthening—of organizations and teams. Where needed or indicated, Plan Coaches could identify the opportunity for Content Coaches to bring further specificity and depth to an organization’s support. Funded partners noted that their coaches helped organize the team’s efforts by providing guidance on where teams could focus their attention, prioritize what progress they wanted to make, and consider how best to use their time with their coach or coaches.



[Our] coach was the **perfect** match. [They] really understood [our organization’s] mission, vision, and core values and were committed. They built a strong foundation of trust.

Funded partner

In addition to personalized attention, the outside perspective and sense of accountability that a coach provided were also critical to the success of most organizational equity journeys. Because coaches were not staff of the funded partners, they brought fresh ideas to teams and could gently push back on ingrained, inequitable structures in ways that not all staff might feel safe to do. Funded partners also mentioned that the consistent cadence of meetings with their coach provided a sense of accountability; knowing that they would need to talk about their progress at the next meeting encouraged them to make progress. Finally, the coaches’ perspectives and expertise in navigating organizational change allowed them to serve as guides when funded partners

encountered roadblocks in making progress toward their goals. Coaches could help teams assess whether they needed to push through difficult challenges, take smaller steps first, or pivot away from an insurmountable barrier to focus on other goals.

The Hub team's individualized approach to match organizations with Plan Coaches and Content Coaches was a key factor to the success of these relationships. For funded partners that worked with the same coach throughout the ELL, most teams reported that their relationship with their coach was very positive and helpful. On the other hand, of the funded partners that ended coaching early, a small number noted that they believed their coach was not the right fit: they felt the coach did not have a good sense of the work they did, did not have the specialized expertise they needed, or brought tools and ideas that felt too generic and not tailored enough to the organization's needs. In some of these cases, the plan coach also reported that their coaching relationship with a specific funded partner was not particularly strong or effective. These relatively uncommon experiences, spread across different coaches and funded partners, suggest that no single coach or participating organization fell short but rather that the match between coach and organization was not always perfect. Although the ELL Hub team made efforts to ensure that organizations were paired with coaches who had the expertise they needed, differences in work styles or communication preferences may have limited the effectiveness of some of these relationships.

Unfortunately, some organizations had limited capacity to engage with this component. In some instances, organizations had previously hired other consultants or coaches to do similar work. These were key reasons why a few funded partners did not take advantage of the coaching component and chose the self-guided tier instead. Because of the effectiveness of the coaches, some funded partners on the self-led ELL track joined the guided track in the second phase of the ELL. Some organizations that did not participate in coaching later reported that they would have liked to take advantage of coaching if they had the capacity to do so.

“ At the time, we just felt like we had so many balls in the air and felt very overwhelmed. And also this sense of urgency that I think impacted our decision [to end our coaching] then. So I do wish we could have slowed down and thought it through more distinctly. We might have left some resources on the table by not working with our coach more than we did... because we got a lot out of the ways we did engage.

Funded partner that switched to Tier 1

Learning community

The ELL offered several learning community activities for organizations to engage with, including affinity groups and all-group learning sessions and peer learning circles. More than any other component, opinions on the learning community activities were as diverse as the participating organizations' journeys.

In general, those who participated in an affinity group series, such as White Women and the Power Paradox and Black Women and Femmes Care Circle, often mentioned that these were incredibly powerful and transformative experiences. Affinity group members, especially those who participated throughout the entire series, were able to form deep, genuine relationships with other participants and felt that these were safe spaces to engage with others in sometimes challenging topics. However, others—particularly ELL members who were people of color or were members of other groups that have been underrepresented in their fields—found some of the affinity group topics to be too basic or repetitive to meet their needs. (For further discussion on the value of learning communities, refer to the chapter “[Factors that Shaped the Success of the ELL.](#)”)

Participants generally felt that it was beneficial to be “on the journey” with others, but organizations could also be at vastly different starting points or bring unique goals and challenges, so group sessions could not always meet everyone's needs. Members of the Hub team also noted this tension, especially when designing content and activities for large group sessions. In the latter phases of the project, based on input from the ELLAT, the Hub team often facilitated multiple breakout rooms to give participants discussion and workshop options. One success story: after two funded partners participated in a breakout session together, they continued connecting outside of the meeting. This connection led to a formal partnership between the two organizations that continues today.

Tools

The OERT and ECP were valuable tools for funded partners to begin their ELL journey and served as foundations for relationship building and shared understanding between ELL teams and their Plan Coach. The strong positive feedback about these tools speaks to the value of having organizations locate themselves on their equity journeys. In particular, the OERT was a favorite and often served as a north star for ELL members, providing the basis for planning and goal setting at the start of their ELL journeys as well as a way to periodically measure and reflect on their progress. Funded partners also noted that it served as a valuable conversation starter, especially for executive leaders who were not fully committed or bought in at the launch of the effort. The OERT also provided teams with an opportunity to reconcile different perceptions about an organization's location in its equity journey and to set shared priorities for their participation in the ELL. Although funded partners also referenced the use of the ECP, it came up less often when participants reflected on the initial steps, likely because of the powerful impact of the OERT on the teams. At least one funded partner noted that they reengage with the OERT annually as a pulse check on their goals and progress made.

Curriculum and resource bank

The modules in the curriculum and resource bank covered a wide range of topics for funded partners to explore. Some funded partners reported distributing certain resources to their broader teams, adding them to their organization's existing resource library, or incorporating them into organizational reading groups or internal learning sessions. One funded partner used the curriculum to guide an all-staff learning experience. Although the in-depth repository was useful, few cited it as the most valuable component of the ELL, compared to other more tailored supports. The curriculum bank was designed to be broad and comprehensive, with no barriers to access, so that participating organizations could explore any and all resources that they were interested in. However, the breadth of the resource bank meant that not all resources felt personalized to organizations and their goals or, in some cases, even felt too basic. In fact, several participants noted that because of the size of the bank, it felt overwhelming to know where to begin.

Members of the Hub team concurred that the bank was a valuable component, but making it more customized or interactive likely would have required significantly more effort. Instead, they believed there was value in maintaining a resource that was simple, comprehensive, and easy to access. For instance, the Hub team recalled discussing the possibility of adding communication features to the online platform that housed the curriculum and resource bank that would have facilitated cross-organization discussion. Ultimately, they decided against it given the high amount of effort it would take to set up, facilitate online conversations, and moderate comments. The Hub team instead chose to focus more heavily on supporting and tailoring the coaching and group learning experiences.





Looking Ahead: Funded Partners Need Resources and Support to Continue Their Equity Work Beyond the ELL

In this section, we explore what efforts funded partners have planned for the future and the reported barriers and facilitators to continuing this work.

Plans for—and barriers and facilitators to—continuing the work

Many organizations reported feeling inspired to maintain momentum on their equity work following participation in the ELL. As the [“ELL Progress and Outcomes”](#) chapter describes, some organizations have embedded equity goals into their strategic planning or other accountability structures, which should help these teams stay connected to their goals. Some funded partners have established staff roles to focus on equity or have provided clear opportunities for staff to get involved, such as participating in ongoing reading groups or equity-related committees. For these organizations, equity work will continue because it is now incorporated “into the fabric” of their structures, policies, and procedures.

One funded partner noted wanting to incorporate measures of equity and inclusion into annual staff satisfaction surveys, and another mentioned wanting to identify an external coach to pick up the baton from their ELL coach in providing ongoing partnership, guidance, and support. Another common goal for funded partners was to continue to embed equity into their human resources practices, policies, and procedures. Other funded partners mentioned wanting to share more about their journey and learnings outside of their organization, such as hosting webinars, or wanting to deepen their engagement of people with lived experiences related to their health equity work.

One obvious barrier to sustaining this work will be the lack of ELL support, especially coaching. For organizations that leaned heavily on their ELL coaches to help them structure, prioritize, and make progress toward their goals, losing this external partner could be difficult. This situation may be especially true for organizations without explicit staff roles or funding dedicated to equity work. Another barrier funded partners predicted is the deeply ingrained culture of burnout that can drain individuals of the energy to pursue this difficult work. Burnout is unfortunately prevalent in the nonprofit sector: half of nonprofits responding to the 2023 Nonprofit

Workforce Survey noted stress and burnout contributed to staff shortages.² Staff mentioned the emotional bandwidth needed to engage in equity-related work is not to be overlooked.

Finally, several organizations also noted the reality of the current political climate, which can make equity work feel especially difficult or even unsafe to some. One funded partner reflected that their organization has received more explicit pushback in the form of expressions of racist, misogynistic, transphobic, and other forms of hate speech from outsiders now that they have centered equity more overtly on their website. The pushback against equity efforts looks to remain a formidable challenge in the future, though the cohort model of the ELL provided many participants with a sense of camaraderie in facing this challenge and pushing the field forward.

Resources needed to sustain equity work

When participants identified resources that organizations would need to sustain their equity work, their combined responses created a clear and consistent list of recommendations:

- **Dedicated resources, including time, funding, and space.** In many funded partner organizations, equity work was often added on to the work of staff who had other full-time responsibilities. Although many funded partners noted that the ELL helped them recognize the need for dedicated resources to make equity work feasible and sustainable, they also noted that it could be difficult to find the necessary resources. Some funded partner organizations created new equity-focused roles on their teams to sustain their equity work, but not all organizations were able to obtain the funding or buy-in from key decision makers to do this.
- **Leadership buy-in and commitment.** Many funded partners reported that having members of their organization's leadership team involved in the ELL was a key reason why they were able to make progress on their equity goals. Organizational decision makers must be bought into equity goals and willing to commit resources and effort to achieving them in order for the work to be sustained. Additionally, leaders must learn and model equitable practices as a way to support broader changes in organizational culture.
- **Supports for staff to learn about and engage with difficult topics.** Several funded partners described creating book clubs, recurring meetings, or other spaces where staff could discuss equity issues, review or debrief on resources shared through the ELL, and share their reflections on their personal or organizational equity journeys. Funded partners that were able to create these spaces noted that they have been critical for maintaining a focus on equity and for providing staff with safe spaces to learn about and engage with topics that can sometimes be uncomfortable or challenging. Funded partners believe that maintaining these spaces will help staff to continue learning about and applying equity principles in their work and to sustain the enthusiasm and commitment to equity generated by ELL participation.
- **A clear, consistent vision for the organization's equity goals with flexibility in the steps needed to make progress toward or reach those goals.** Nearly all funded partners reported that the tools and structures provided by the ELL, particularly the ECP and OERT, helped set a vision for their organization's equity work. This guiding vision provides purpose and helps focus staff efforts.

² National Council of Nonprofits. "2023 Nonprofit Workforce Survey Results: Communities Suffer as the Nonprofit Workforce Shortage Crisis Continues." 2023. <https://www.councilofnonprofits.org/files/media/documents/2023/2023-nonprofit-workforce-survey-results.pdf>.

Factors that Shaped the Success of the ELL

In this section, we describe some of the factors that may have contributed to or inhibited organizational progress on equity—including reflections on the ELL’s cohort model.

The power of community

A number of funded partners discussed how the cohort model of the ELL, especially the opportunities to engage with ELL material with others through coaching and group learning, supported both organizational and personal equity journeys. They explained that working alongside others provided helpful perspective and connection while individuals engaged in often challenging work. In fact, the cohort model was itself a motivator for funded partners. Staff from one funded partner mentioned that leaders had originally been hesitant to engage in equity work, but seeing other organizations jump into this effort—along with growing internal interest and pressure to do the same—influenced those leaders to finally make this explicit step to commit to equity generally and the ELL specifically.

“Hearing [about the experiences of other organizations] normalized the challenges and helped me realize we are doing well in some places and making progress.

Funded partner

As anticipated in the Hub team’s theory of change, personal and organizational benefits intertwined as ELL participants became more empowered to bring their full selves to the workplace. As such, interviewed funded partner staff reported a number of reflections on the value of the cohort model on a personal level.

- Many reported that **hearing or sharing stories of personal or organizational growth led to expanding their own understanding of and capacity to engage in equity work.** Staff noted that it was helpful for them to see and understand in real time that the challenges they and their organizations faced in this work were also true for many other individuals in other organizations. Because equity work can be especially emotional and fraught, it was helpful to see that challenges are “normal” or, at the very least, common in equity work.

- Many also reported that **they were grateful for opportunities to be in community with others—to not feel like they are doing this work alone.** Staff talked about how equity work had historically felt very siloed, but the cohort model of the ELL helped break down barriers within and between organizations and provided staff with external peers to be in community with. Group convening often facilitated small-group discussions or incorporated other personal touchpoints that made participants feel supported by their cohort members. Affinity group participants especially expressed this sentiment; they talked about the bonds that they built over time with other group participants.
- **Hearing or sharing stories of personal or organizational growth led to funded partner staff expanding their own understanding of and capacity to engage in equity work.** Staff noted both the importance and the challenge of engaging in difficult conversations, unlearning internalized biases, or learning about new strategies. Personal stories about participants’ “a-ha moments” as part of their ELL journey provided concrete examples for others and demonstrated the possibility for change and growth.

Sharing this journey with other organizations also supported funded partners to make progress toward their equity goals. Funded partner staff noted that the cohort model and cross-organization connections allowed them to do the following:

- **Come away from collaborative peer learning sessions or affinity group discussions with new ideas or strategies for their organization to pilot in both external and internal equity efforts.** Collaborative group sessions supported participants to learn from each other about a variety of topics, including where each organization was starting in its journey, what progress it had made, what aspects had been challenging or what structures held it back, and what tactics had been successful in making progress. By hearing staff in other organizations talk about these experiences and lessons, participants could bring those stories and learnings back to their own teams to inform their next steps or strategies.
- **Better understand how their organization’s current structures supported or inhibited their progress.** Participants reported being able to compare and contrast their experiences with the experiences of other organizations, allowing them to see the impact of their organization’s structures. One common example shared was around the impact of organizational leadership. Those with supportive leadership found hearing from other teams that did not have this explicit buy-in helped staff appreciate their circumstance and encouraged them to make the most of it. For those without supportive leadership, it was validating to hear that their struggles were not unique.
- **Feel motivated by the strong commitments from others in their field doing the work.** Equity work can be challenging both organizationally and personally, so participants appreciated having frequent engagements with and connections to other organizations in their field taking on this work. When another organization achieved a milestone, others could see these celebrations as “lights at the end of the tunnel.”

Additionally, in a few instances, staff connected with other participating organizations outside of the ELL activities. One example was an organization team that heard about another organization’s recent overhaul of its leadership team during a breakout call and set up a one-on-one discussion afterward to learn more about how that team had navigated staff transitions. Another pair of organizations connected after an ELL session to discuss elevating community voices. As previously mentioned, this connection led to the two organizations forming a formal partnership to create a new initiative engaging people with lived experience in their research projects, which promotes the validity and meaningfulness of their work to advance health equity. These informal discussions and formal partnerships would not have been possible without the cross-organizational connections forged during ELL activities.

Finally, a number of funded partner staff also talked about Plan Coaches as part of the community ecosystem of the ELL. To these organizations, Plan Coaches often served as trusted partners who, over the course of the ELL, came to deeply understand their funded partners' missions and goals. Plan Coaches supported funded partner teams in using the ELL tools to develop goals; provide structure, guidance, and assistance in developing and implementing a plan of action; and successfully evolve or pivot as needed. Staff also said that their coaches—as external collaborators on this journey—provided fresh perspectives to help funded partners navigate difficult conversations and decisions and pushed for teams to grow, even amid discomfort.

Other factors that promoted progress

Funded partners, Plan and Content Coaches, and the Hub team elevated some key factors that generally supported participants to make progress toward their equity goals. Below, we summarize common themes and highlight experiences from funded partners.

Buy-in from those in positions of power or decision-making authority was critical for progress

For example, the board of one funded partner established explicit goals focused on combating structural racism as a means to reduce disparities in health outcomes for the people it serves. As part of this effort, the organization developed goals to identify and implement promising practices in dismantling structural racism (such as applying abolitionist frameworks to their practices) and build external partnerships to support this effort. As a result, the funded partner set up structures to provide consistent and frequent updates to the board about its progress, which helped keep the team accountable for its goals and in communication with leaders who could support them when challenges arose.

Additionally, the actions and priorities of senior staff could influence the organizational environment. Such support could manifest as senior staff allocating funding, time, or other resources for staff to explicitly participate in ELL activities, to participate in the ELL themselves, or to engage meaningfully and modeling equitable practices. For example, one funded partner mentioned having strong commitment from a senior staff person whose advocacy was valuable both to their internal and external work in this space. In another example, the founder and CEO of one organization was very committed and served as a driving force for the effort, with staff noting, “if [they] are on board, then something happens.”

Openness from staff to have difficult conversations about race, racial equity, and other aspects of intersectional equity when needed was crucial for transparency, understanding, and progress

Several organizations mentioned the necessity and power of engaging in difficult conversations about identity and equity for building trust. These conversations allowed staff to identify the roots of deeply entrenched issues or biases—particularly around topics such as privilege, power, cultural assumptions about professionalism linked to dominant culture characteristics, or other manifestations of systemic oppression in the workplace—so that they could move forward in productive and equitable ways.

Staff at one organization noted that their Plan Coach was invaluable in supporting their team to have tough internal conversations as they were proposing new ways to structure the organization, needing to dig into discomfort around the ways the organizational hierarchy was reinforcing disrespectful, inequitable behaviors.

Without that external mediator, they reflected that it would have been easy for their team to shy away from or avoid the discomfort of these conversations.

Some funded partners had already started organizational equity work prior to joining the ELL, which helped them make quick progress in some areas

Some funded partners came into the ELL with contextual factors, experiences, tools, or resources that likely augmented their ELL experiences. Some teams reported that their organizations had already begun explicit equity-related efforts, from having internal conversations around equity-related topics such as the impact of structural racism on health to hosting equity-related trainings to starting the process of embedding equity into organizational policies and structures. It is important to note these factors as further evidence of the diversity of experiences and needs that funded partners brought to the ELL work.

For example, one funded partner started to have conversations about race and equity in its work in the aftermath of the 2020 racial reckoning following George Floyd's murder. This organization had already launched internal learning activities focused on equity—such as book clubs and video reviews—and was facilitating conversations about what it could do to advance equity externally when it joined the ELL. Given this strong foundation, this organization felt that the timing of the ELL was perfect for it, as it was not starting from scratch but was eager and ready to benefit from the structures and supports provided by the ELL to accelerate momentum and make meaningful progress.

Similarly, another funded partner mentioned that its organization made the investment to bring on an external trainer to support individuals at the organization in their personal equity journeys. This investment showed commitment from the organization and provided another space for staff to learn and make progress toward a shared vision for equity.

Consensus in establishing a clear vision supported the launch of ELL activities

For example, staff at one funded partner remembered that there was clear alignment between those who participated in the initial OERT exercises around their shared goals. They noted that this early clarity and alignment in their vision made it easier to map a path forward.

Factors that inhibited progress

Common themes also emerged about what structures could stand in the way of meaningful organizational equity progress.

Funded partners often had limited time, money, and resources for equity work, and this work sometimes fell disproportionately to staff who are already systemically marginalized

Making changes to organizational culture, practices, and policies takes dedicated and intentional time and effort, and competing priorities can make it difficult for organizations to focus on equity. The lack of dedicated time or resources (such as allocated funding or staffing) made it challenging for some organizations to prioritize this work. Additionally, current structures that are (or are not) currently in place could delay progress. For example, organizations where staff need to bill for their time did not always have dedicated charge codes or allocated funding for this work. More broadly, staff at several funded partner organizations commented that they often took on equity work in addition to their other job responsibilities.

In particular, one organization noted that equity work fell to BIPOC staff at its organization, burdening them with leading equity initiatives on top of their other duties while their White counterparts were rarely expected to pick up these additional responsibilities.

Because funded partners were already receiving financial support from RWJF as part of THHCS, the foundation did not provide additional funding directly to organizations to engage in the ELL work. If organizations did not make time or allocate funding for their staff to engage with this resource, it was sometimes difficult for staff to participate amidst other project work, organizational priorities, or billing constraints.

Lack of clear commitment from leaders limited what other staff could move along

A common theme was the impact of organizational leaders, for better or worse. For example, one funded partner mentioned that hesitation from organizational leaders about the ELL and equity work in general prevented the team from being able to clearly define roles or establish decision-making authority for ELL participants. Staff reported that this made them feel like they did not have the power to make meaningful changes. Their organization also did not establish accountability for its equity work in general, which signaled to staff that the work was not a priority.

Leaders could also act in ways that prevented progress. For example, one staff person noted their impression that if leaders feel personally attacked and are not open to confronting their own biases, it may prevent that leader from supporting efforts aimed at developing equitable organizational practices.

Staff turnover could interrupt the flow and continuity of work

Participating staff leaving an organization or experiencing professional pressure could limit a team's ability to engage consistently and thoughtfully in ELL. Staff turnover and overextension affected their ability to oversee the steps toward certain goals to completion, especially given constraints that some organizations faced around a lack of dedicated time or funding to participate in the ELL.

Because of the diversity of participating funded partners and their equity goals, the ELL could not always offer the specific support an organization needed to make progress toward those goals

Some members of the Hub team noted that the diversity of organizations could make it difficult to plan peer learning and all-group learning opportunities. For at least one organization, the internal goals it originally set were focused on specific aspects of equitable human resources policies that are still emerging in the larger field. The Hub team attempted to identify additional coaching supports for this organization but was unsuccessful at finding a good match given the nascent nature of this line of organizational equity work.

Role of the Hub team’s approach to implementation

The Hub team’s approach to implementing the ELL was as a key factor shaping participating organizations’ experiences. In particular, the Hub team’s efforts to embody the ELL’s values and principles in its approach to its work helped create a successful program.

The Hub team understood the difficulty and importance of the work when it designed the ELL. As such, the team solidified the values that its members aimed to carry through the implementation of the ELL. First, the Hub team, as leaders of the ELL, recognized that it should model equitable practices. Through practices such as offering an open call for coach applications—rather than selecting candidates from those team members already knew—and beginning each all-group learning session with a set of shared group agreements to foster psychological safety, the Hub team intentionally tried to lift up principles related to racial equity in its actions. Additionally, the Hub team took a learning approach to implementation, embedding space and time for participants and key advisors to inform the direction of the work. In addition to frequent meetings with the ELLAT, the team also routinely gathered feedback from coaches and other ELL participants, including at the end of every all-group learning forum. The team’s intentionality carried through the lifecycle of the work and was foundational in shaping the experience.



Lessons for the Field: What We Learned About Organizational Equity Work

The innovative ELL model expanded the understanding of how equity work can be advanced and supported within organizations. Participating organizations reported deep gratitude for the ELL for providing resources, space, and a shared community in which to strengthen their commitments and action steps toward embedding equity within their organizations. As shown in Exhibit 4, the supports offered as part of the ELL planted the initial seeds of transformation, and both participating individuals and organizations took steps to establish deeper roots of lasting change. During this period, some organizations were able to further embed equity into the ways in which they internally and externally function and act in the world, showing new growth beyond the organization itself. With the cultivation of these embedded internal and external strategies, the ELL's vision is that transformation will flourish in communities beyond these organizations. This transformation will take time to emerge and blossom, and changes beyond the ELL will require sustained efforts and supports.

Exhibit 4. Stages of equity transformation during and after the ELL



Here, we summarize key lessons learned from the ELL that could apply to other organizations that want to engage in equity work and for funders interested in supporting this type of work through a cohort model.

Key components of the ELL helped embed seeds of transformation in participating organizations and their staff

The most valuable supports that participating organizations received were the components that were most tailored to individual organizations' needs. Specifically, participating staff found the support from and partnership provided by Plan Coaches and the opportunity to create customized plans that reflected the context and realities of the organizations in which they worked incredibly valuable. The process of creating these customized plans also served as a reality check for many organizations, as they grappled with the fact that different staff could have different perspectives on the organization's starting point and progress on their equity journeys. Plan Coaches also helped push organizational teams to make more progress than they likely would have made on their own by holding teams accountable for their equity work and pushing them to consider creative approaches to advancing their equity goals.

Personalized coaching is transformative when the match between coach and organization is strong.

Overwhelmingly, funded partners who participated in coaching spoke highly of their relationships with their Plan Coaches, noting that their coaches were instrumental in the progress they made. Making a strong match between an organization and a Plan Coach relies on many nuanced factors, including how well the staff team and culture of the organization aligned with Plan Coach's approach and style. Facilitating a thoughtful matching process is an important lesson for the field to make the most out of external coach partnerships. The Hub team used an initial intake form to understand each organization's intended goals, planned areas of focus, readiness for deeper engagement, and commitment to supporting staff participation as a basis of understanding how to best match the organization with a Plan Coach. To further ensure a good match, coaches and organizations could build in an initial trial period – say, six months or so – to see how the match is working in practice and then agree to continue moving forward or to make a change.

The cohort model fostered a valuable sense of community overall. By design, some components of the ELL were less tailored to individual organizations to ensure a common foundation of knowledge, and some participants perceived these as less directly applicable to their equity journeys. Although funded partners saw the value of the cohort model for making connections and fostering a collective sense of community, not all participants found all of the shared resources and activities of the ELL helpful. Because of the diverse range of funded partners and their strengths, challenges, progress, and goals, aligning content for every organization in the ELL could be challenging, and some funded partners said that some of the group learning activities were therefore less valuable than the tailored coaching they received. By frequently seeking feedback from coaches and the ELLAT, the Hub team was able to align as best they could with the current needs of funded partners. Future efforts should consider these limitations of the cohort model while also understanding the benefits gained from building a shared community experience. Finding the appropriate interplay between bespoke supports, community-building opportunities, and shared resources is critical to success.

Organizations need time, resources, and the sustained commitment of their staff to nurture their budding equity work; the ELL should not be perceived as the end of participants’ personal and organizational equity journeys

The work of addressing racial and other forms of intersectional equity is imperative for all organizations to begin or continue, regardless of their starting point. Cohort-based initiatives to support organizational equity could potentially benefit from grouping organizations according to where they are on their journey. Organizations participating in the ELL completed an initial survey that helped the Hub team identify topics and goals of interest, and the OERT process provided another grounding in where organizations were on their journeys. Information gleaned from the survey and OERT could have been used to group participating organizations into cohorts based on their interests and their locations in their equity journeys. Such an approach could have fostered more cross-organizational alignment and mitigated some participants’ sense that certain components of the ELL were too basic for them.

Organizations must be thoughtful about who is taking on the burden of addressing equity; White leaders and staff also need to assume responsibility for racial equity work, alongside staff of color.

Equity work should ideally be taken up by all staff, not just staff who hold historically marginalized racial identities. Sharing the vision and the labor of equity work is critical to meaningful organizational change and starts with all individuals doing the work of self-exploration to uncover personal biases and sources of privilege. This degree of self-reflection and commitment to equity work can be challenging, uncomfortable, and seemingly disconnected from staff’s day-to-day responsibilities. It is important for all staff—but especially those with privileged racial identities—to grapple with that discomfort and, to the extent possible, to advocate for creating more time and space to engage in equity-focused work within their organizations.

Executive leaders must champion both internal and external equity-focused efforts—and be honest with themselves about their positionality, the power they hold, and the progress they are making.

Many aspects of organizational structures are built to uphold inequities, and the funded partners with engaged, committed leaders were more able to confront that reality and take real steps to distribute power more equitably. This required organizational leaders to actively cede some of their own power to staff and organizational advisors, such as advisory boards or expert panels. Actively seeking opportunities for deep self-reflection and genuine power-sharing, such as engaging diverse voices in the design and implementation of organizational work, have been beneficial for both leaders and organizations.

It is the responsibility of individual staff to reflect on the ways in which their identities and organizational roles can intersect to produce privilege and power.

Many staff participating in ELL activities recognized that multiple dimensions of their identities—including race, gender, and sexual orientation—could intersect with the positional power they held in their organizations to influence the level of privilege or decision-making authority they held. The ways these roles and identities intersect—and the implications of those intersections—are often situation-dependent, which requires individuals to reflect on and be aware of these dynamics.

Funders should support equity-focused capacity-building work, both to provide organizations with resources for these efforts and to signal the depth of their commitment to creating a more equitable world.

Especially for funded partners that bill for their time, ELL teams sometimes struggled to find time to participate in ELL activities. Staff mentioned that additional funding to cover the time spent participating in ELL activities could have alleviated pressure, encouraged deeper or more consistent participation, and accelerated progress.

Funders that are committed to equity recognize that individuals and organizations need to strengthen their own equity practices in order to bring about more equitable health outcomes for their communities. Backing that recognition up with material support for organizations to grow their equity-related capacity sends a powerful signal that funders are committed to equity in all parts of the health and health care ecosystem, in both processes and outcomes.

Community impacts resulting from this effort take time to emerge—but those impacts could be transformative

Equity work is an ongoing journey: there is no destination or point of arrival. This journey can be challenging and uncomfortable, slow and circuitous—but if ELL participants stay committed, they are on track to generate transformative change. Participants in the ELL universally emphasized that organizational equity work is difficult and that it takes time to produce results. Although all participating funded partners believed they had made some progress on their equity journeys thanks to the ELL, they noted that their progress could sometimes appear limited from the outside. At the same time, staff who participated in ELL activities also highlighted that equity work can be transformative and liberating for staff within the organization and support their ability to make real impacts in their external work. Because the challenges in dismantling equity are so massive, it is still important to make—and celebrate—small steps forward, while recognizing that transformative change requires long-term commitment, even through moments where progress might appear slow or stalled.

Individuals and organizations working to advance health equity want to do hard things. Their commitment and tenacity will be needed in the years to come to show how their individual and organizational transformations can yield meaningful changes for their communities. Participants in the ELL demonstrated that both individuals and organizations can make the commitment to racial and other intersectional forms of equity work, despite the inherent discomfort and barriers they faced. Participants wanted to engage in this work and were inspired by the ELL to continue their equity journeys over the long term. This individual and organizational commitment will be critical for success, especially in the face of continued structural barriers such as limited funding and support. By staying connected to one another, leaning on and learning from each other beyond the life of the ELL, organizations and participants are setting the stage for the kind of transformative work needed to help their communities flourish.

“ I think a lot of organizations don't [make the effort to change] because they're like, whoa, what if we make the wrong step? With racial equity, it's not about being so terrified to make a misstep that you just don't do anything—we're going to get it wrong. It's about acknowledging that you got it wrong, educating yourself to the point where you know you're not going to make that same mistake, and moving on and doing more. So, I feel like [this experience] has helped us recognize that change happens and yes, it's slow and it takes time. Our world has a lot we're trying to unlearn. The ELL has really supported us in a way to feel like this is possible. It might be slow going, but we can get there.

Funded partner



Setting Up for the Long Term

The ELL offered funded partners a unique, supportive environment to intentionally reflect on, plan for, and make progress toward embedding equity into strategy, evaluation and learning, and organizational development. Overwhelmingly, Hub team members, coaches, and participating funded partner staff came away with new or refined skills and knowledge about embedding equity into organizations, thoughtful personal reflections, hopes for the future, and a deep appreciation for the journey.

Funded partners' experiences with the ELL suggest that ELL programming has supported many of the individual and organizational changes these partners sought, with early evidence that these changes have led to meaningful improvements in organizations' equity practices. For example, many funded partners noted that participation in the ELL helped prepare staff to have difficult conversations with colleagues about the ways in which their organization's internal policies, processes, or strategies upheld structural racism and inhibited their ability to promote health equity. By having the courage to hold these challenging and uncomfortable conversations, several funded partners were able to **reframe their organizational goals and strategies** to reflect a more explicit commitment to promoting equity. Setting these equity-oriented goals and visions has helped provide staff with a sense of purpose while also signaling a meaningful commitment to equity to the outside world. For example, participation in the ELL has pushed some organizations to engage more deeply and meaningfully within their communities.

Progress toward the ELL goals is setting organizations up for long-term success

ELL participants have shared many examples of how working toward the ELL's goals has helped equip them to better center equity in their organizations and, in turn, to more effectively achieve equitable health outcomes for their communities. For example:

- **Embedding equity in strategy.** The Public Health Accreditation Board (PHAB) was developing its 2020 strategic plan while participating in the ELL. The team's experiences in the ELL, and particularly the OERT exercise, helped inform the development of specific equity-focused goals in PHAB's strategic plan.
- **Embedding equity in internal and external evaluation and learning.** During the ELL, the Institute for Medicaid Innovation established an advisory board committee to center voices in the community and those with lived experiences in Medicaid to inform the organization's work.
- **Embedding equity in organizational development.** AcademyHealth worked with its plan coach to embed equity in its hiring practices. This work has allowed the organization to build a staff that bring a diverse set of perspectives and experiences and are committed and equipped to continue their equity work in the long term.

For more information about participating organizations' equity journeys and the outcomes they achieved, see equitylearninglab.org/partner-profiles.

Authentic community engagement has helped organizations hold themselves accountable to internal practices and policies that distribute power and promote equity; this deeper engagement has also led to the co-design of meaningful programs that align with community priorities.

The ELL’s tools and resources also helped funded partners recognize how **research, evaluation, and learning** can support their equity work. For example, some participating organizations thoughtfully reviewed data collection and evaluation tools, practices, and projects to assess and further embed equity and participatory engagements.

Funded partners have also used their individual and organizational growth to support ongoing **organizational development**, thereby setting themselves up to continue their equity work beyond the ELL. For example, updating leadership and decision-making policies and practices and broadening their talent pools have helped organizations to effectively share power and bring a broader set of perspectives and experiences to bear on their work.

The ELL’s ultimate vision was that the tools and resources it provided, and the shifts in policies, practices, and strategies that organizations implemented, would ultimately make funded partners more aware of how racism and other forms of oppression shape their work and equip them to address these factors to ultimately produce more equitable outcomes within their communities. Three years after the start of the ELL, participating organizations and ELL supporters agree that although significant progress has been made in these areas, the work is ongoing and expansive. Many funded partners operate in settings where anti-EDI legislation and backlash against equity-focused initiatives have gained momentum—obstacles that serve as a reminder that the work to dismantle racism and other forms of oppression is long, difficult, and rarely linear.



We had a long list of goals for the ELL, but when I think about it and take a step back, one that I really appreciate and value is that there was a goal for this entire structure to support organizations to do work **differently**.

That may sound broad, but in order to do things differently, in a world where we’re all doing our best to just keep things moving and do things the way we’ve always done them, it can take real intentionality to pause and learn.

Hub team member



Equipping organizations with the tools to center racial equity in their operations and strategies is a necessary step toward greater effectiveness in this movement, but that step will not be enough on its own. Organizations and the individuals they are composed of will need to take a long view of this work and affirm a sustained commitment to continuing their personal and collective equity journeys. The skills they have built through the ELL and the relationships they have formed with coaches, other organizations, and movement leaders will serve ELL participants well as they face these oncoming opportunities and challenges and advance the movement for equity.



It's really important to continuously return to vision. If we are successful, what would the world look like? If we are successful, what would our organization look like? And then, for each person, who would I need to be?

If I'm imagining several generations into the future, what will they have wanted me to speak up for? What will they have wanted me to take action on? What will they have wanted me to center?

adrienne maree brown, final ELL Convening

