**Scenarios to help foundations explore equity in learning—**

**Evaluation ownership:**A foundation crafts a new initiative led by two intermediary grantee organizations. Based on the foundation’s direction, an external evaluation firm assesses the grantees’ collective activities, achieved outcomes and ultimate impact.

* What role, if any, do you think grantees played in the selection of the evaluation firm?
* What do you think is going on in this scenario in relation to power?

**Learning with grantees:**A foundation and its grantees co-create a learning agenda to guide their cause-based work. The foundation routinely checks in with grantees to find out what’s working and where midcourse adjustments are needed. The foundation documents and shares real-time data with its grantees and staff.

* Where is equity in this scenario?
* What are the challenges to this foundation’s co-learning approach? Do the benefits outweigh the challenges?

**Shared learning among foundation staff:**The planning of a foundation initiative takes place in a small team of senior-level staff. Staff charged with supporting the initiative generally understand its purpose, yet they have limited knowledge of past lessons informing the initiative and learning objectives moving forward.

* Why would those in power exclude program staff from the planning process?
* What obligation do seasoned, senior-level staff have in sharing their knowledge with newer staff members? What obligation do senior-level staff have in listening to the perspectives and experiences of younger staff?

**Book knowledge versus lived experience:**Foundation staff with a theoretical understanding of a social issue design the learning agenda for an initiative offering interventions. Those on staff with lived experience on the issue are excluded from this process.

* What is considered to be expertise?
* How important is it for the foundation staff to reflect and hold the experience of the communities they serve? How important is it for the foundation staff to understand grantees’ local context?

**Learning and equity between foundations:**The Great Foundation, a large grant maker, approached the Better Life for Children Foundation , a small operating foundation, to do work with them on a multi- state equity initiative to reduce disparities in early childhood education. Based on their agreement, Great Foundation has provided the funding for the initiative and Better Life for Children has provided staff, materials, training and an evaluator to evaluate the initiative.

* Would you consider these foundations to be equitable partners?
* How might this relationship affect grantees?

**Engaging university learning partners:**The Foundation for Learning requires community grantees to engage in data-based decision making and to document their projects with evidence. A university researcher has approached a grantee community and offered to do a research project on the community’s activity. The research project will require half of the total community grant (48% of which will go into university overhead).

* What is the responsibility and role of a university to its community?
* Who should carry the cost of pursuing the evidence desired by the foundation? What is the foundation’s role and responsibility?

**Learning with your board:**The board of Foundation High Engagement is embarking on a learning agenda to help their decision making. The board has decided to invest $50,000 in the first year to design and start collecting a meaningful plan for continuous learning. The foundation’s focus area is community change for better outcomes for children and families. They fund partnerships between ten neighborhood collaboratives and their related school districts.

* What are the possible purposes for a learning agenda?
* How should the foundation go about designing the learning agenda? Who should inform the learning agenda and how should it be used?

**What you do with the learning:**A program officer of The Foundation for Change is proposing a grant to her board for a learning grant that would support an advocacy group in analyzing a specific legislative action through a racial justice lens and then using the learning to fight for policy change. The board is concerned about foundation restrictions on lobbying and about whether white community members will be offended by the results.

* What are some design considerations for learning grants that may lead to advocacy and policy work?
* What type of learning should a foundation support and who should have access to that learning? How much control should a foundation have on how learning processes and results should be used?