

For internal sharing/discussion

Note: Gretchen Syverud, Dir. for Strategic Alignment, Lumina Foundation welcomes talking through this peer learning experience and sharing session agendas (which focus on EEF Orthodoxies) with fellow EEF Practice Partners/Practitioners. Feel free to reach out at gsyverud@luminafoundation.org.

Plan for learning sessions 2023

Series on Effective, Equitable Philanthropic Practice

Background and Purpose

We find ourselves at a critical inflection point this year as we consider where we have been and where we are going beyond Goal 2025. As we explore where we have had the most impact as a foundation, larger questions loom. What has and what can our grantmaking do and in what contexts is it most effective? What has worked well and where can we improve our grantmaking? What can we do to ensure equitable and effective approaches are more consistently applied?

The All Learning Counts evaluation on grantmaking practice and the small conversation we had in February of this year to “turn the mirror on ourselves” was a critical moment for Lumina in terms of exposing some of our failures and weaknesses as grantmakers as well as the need to further unpack challenges and best practices and implement tools, processes and practices that can strengthen our work moving forward.

While Lumina will commission research to explore Lumina’s impact on specific organizations and bodies of work since 2008, there are still opportunities to explore and unpack challenges, promising practices and what we’ve learned overall about our grantmaking process and practices. The series described below is intended to provide space for staff to reflect on key moments in the grantmaking process (e.g. defining success, selecting partners, monitoring and course correction), and related challenges, strengths and lessons learned from specific bodies of work across the grantmaking process. Additionally, we will use the Equitable Evaluation Orthodoxies to help challenge some of our common assumptions made at each of these stages in the grantmaking process.

Goal/outcomes:

For strategy staff:

- Review evidence about what works related to philanthropic practice
- Challenge common assumptions and practices related to our grantmaking
- Explore strategy staff experiences to identify lessons learned from current and past work
- Generate takeaways and/or recommendations to inform Lumina’s grantmaking practice and strategic planning

For SIP team:

- Share data, evidence, and institutional knowledge in context, with relevant applications
- Discuss and learn alongside our colleagues
- Take responsibility for appropriate takeaways and recommendations that will support ET and strategy staff to be more impactful

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General meeting agenda structure:

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- Based on the [Equitable Evaluation Initiative \(EEI\)](#), choose 1-2 orthodoxies as a starting place to examine how Lumina approaches key aspects of grantmaking
- Pull excerpts from Lumina evaluations relevant to the orthodoxy
- Analyze any data from Fluxx or other GM sources relevant to the orthodoxy
- Use concentration area threads to identify illustrative examples of work
- Prepare 2-3 staff to share experiences
- Discuss how to address these orthodoxies and improve how we do our work

Follow-up resource

Deliverable created after learning session that offers takeaways and recommendations for ET and strategy staff, poses further questions, and links to additional resources. Gretchen and Susan will take responsibility for shepherding and/or delegating follow-up action items.

Timeline

Date	Relevant EEI orthodoxy	Strategy topic
May 15 (virtual)	Introduce framework (EEI orthodoxies)	-
June 6-8 (Connections)	“The foundation defines what success looks like.”	Setting goals and expectations
August 21 (virtual)	“Credible evidence comes from quantitative data and experimental research.”	Using data, research, and evidence, including from qualitative sources
October 10-12 (Connections)	“Trust and relationship come from doing the work, but are not the starting point.”	Grantee selection and relationship-building
November 29 (virtual)	“Time frames and short-term outcomes serve as indicators of good stewardship.”	Monitoring, supporting, and course correction