Cordis Bright

EDI in the research project cycle toolkit

November 2024

CordisBright

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Introduction

Overview

This toolkit provides a set of tools for incorporating EDI considerations into different stages of the project cycle. We recognise that this is vital within all research, to ensure that it is robust, reproducible, ethical and relevant to societal issues (Tannenbaum et al. 2019). For example, consideration of EDI might help to:

- Reveal implicit assumptions and, where possible, mitigate biases.
- Strengthen the evidence base on differences in access, experiences and outcomes for people with different characteristics and identities.
- Support research aims, objectives, and outcomes that serve all communities.
- Prevent overgeneralised findings that can be harmful or misleading.

The toolkit was developed in 2022 by the Cordis Bright EDI (equality, diversity, and inclusion) taskforce as part of our ongoing commitment to promoting EDI both in project delivery and internal policies and practices. It is based on a review of available publications on EDI considerations within research.[1] Considerations will vary by project and this toolkit provides a starting point for reflection and action, rather than a prescriptive set of instructions. Where applicable, we have included signposting to further resources and information.

The toolkit is intended to be a live document, i.e. we hope that colleagues will continue to enhance and suggest improvements on an ongoing basis. The toolkit will also be formally reviewed every three years, to ensure that it is fit for purpose.

Terminology

Consistent with the approach we have taken in our Equality, Diversity and Inclusion strategy, throughout this toolkit we use the terms ‘EDI considerations’ and ‘EDI factors’ to include both:

- **Protected characteristics set out in the Equality Act 2010**: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.[2]
- **Characteristics and experiences not covered by the Equality Act 2010**, such as: asylum-seeking or refugee status, caring responsibilities, care background, gender identity, HIV status, homelessness, long-term and/or chronic health conditions, mental

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[1] See Appendix 1 for a list of the resources reviewed and bibliography.

[2] https://www.equalityhumanrights.com/en/equality-act/protected-characteristics

health, nationality or residency status, neurodiversity, offending history and socio-economic status.

However, this is not an exhaustive list. We recognise that people may experience barriers and discrimination relating to other characteristics and experiences.

Reflecting on Cordis Bright research context

Our research and evaluation projects are commissioned or grant funded by clients. In general, we are working to a pre-determined brief which addresses their research and evaluation priorities within a relatively fixed budget and timeline. There are important differences between research and evaluation in this context, where we may face constraints in our ability to shape and inform the project, and research projects where a researcher might be responsible for initiating decisions on the research topic and approach.

However, we often collaborate with clients to refine briefs and to develop or refine research questions, approaches, methods and tools. In this context, we can reflect on the extent to which EDI considerations have been appropriately factored into the project brief and research questions as part of our initial and ongoing discussions with them. As part of these discussions, we may be able to encourage clients to increase the focus on EDI considerations, particularly if they understand this to enhance the quality, utility or likely impact of the project. Importantly, this is also something that clients should be considering, both in line with legal obligations not to discriminate and, in the case of public authorities, to comply with the Public Sector Equality Duty (i.e. consider how their policies or decisions affect people who are protected under the Equality Act).

We should also ensure that approaches, methods and tools that we adopt as part of our standard practices build in EDI considerations as much as possible. If our ability to do this is restricted by budget, resourcing or other practicalities, we should acknowledge and explain the limitations of the research and its findings in our reports.

This toolkit therefore provides guidance for incorporating EDI considerations into the project cycle given the constraints we commonly face from the research context we operate in.

Possible reflection and discussion points when developing research collaboratively with clients

- Which sector does the research or evaluation project relate to? Which groups are targeted by the research and/or by the programme being evaluated?

- What evidence is there of structural inequality within this sector?

- What existing evidence is there that level of need, access to and experience of support, and outcomes differ amongst different groups?

- What existing evidence is there of positive practice in the sector? What do we already know about "what works"?

- What are the relevant gaps in knowledge? Has previous research sufficiently incorporated relevant EDI considerations and/or their intersections? If not, is there potential for this research project to address any gaps in knowledge?

Acknowledging our own position

It is important for us to reflect on and recognise the role of our own identities and positions in shaping our own views and actions, as well as the ways in which people perceive and interact with us during research. This will impact upon our research practices, findings and outputs. There are times when it may be important to explicitly acknowledge our own identities and position within our research projects. For example, if we have reason to believe that our own lived experiences might be relatively removed from those of the people a programme seeks to benefit then we may wish to address this directly.

Summary of tools

Figure 1 summarises the tools presented in this toolkit.

Figure 1: Overview of tools

Tool
Tool 1: Developing research questions
Tool 2: Involving people with lived experience in the research design and delivery process
Tool 3: Fieldwork method selection and delivery
Tool 4: Sample selection and participant recruitment
Tool 5: Enabling research participation
Tool 6: Monitoring and outcomes data collection and analysis
Tool 7: Reporting and analysis
Tool 8: Disseminating findings
Tool 9: Post project reflection

1 Tool 1: Developing research questions

What the guidance says

It is important to explicitly address EDI considerations in research questions (Farooqui et al 2018; NSERC 2022; For Equity 2022). This helps to mitigate research bias, which may otherwise focus on the experiences of majority groups if EDI considerations are not explicitly included.

Guidance and toolkits highlight several important reflection points to consider when incorporating EDI considerations into research questions. These are:

- Whether and how our research questions should be of equal or specific relevance to different groups, based on demographic characteristics, identities or common experiences? If they are not, is there a suitable rationale for this (NSERC 2022)?

- Can and should the research questions examine differences in experiences or outcomes for different groups? Examples include differences in (For Equity 2022):

  - The nature, level and prevalence of need.
  - Access to or engagement with services.
  - Experiences.
  - Outcomes.

- If differences across groups are included in the research questions, which groups should we focus on and why (For Equity 2022)? Have we considered heterogeneity within and intersectionality between these groups (Farooqui et al 2018)?

- Can and should the research questions consider whether attitudes, confidence and/or competency relating to EDI factors are influencing a programme, including its implementation, inputs, outputs or outcomes (Farooqui et al 2018)?

- Can and should the research questions encourage us to identify any possible unintended effects (positive and negative) on particular groups (For Equity 2022)?

1.1 Decision making tool

Our research and evaluation questions may be pre-determined by our research brief or our client's priorities. In these situations, it may not be as simple as incorporating the above guidance into our research questions. However, we often collaborate with clients to develop or refine our research questions, including as part of the development of evaluation frameworks.[3] Figure 2 presents a decision making tool we can use in these situations.

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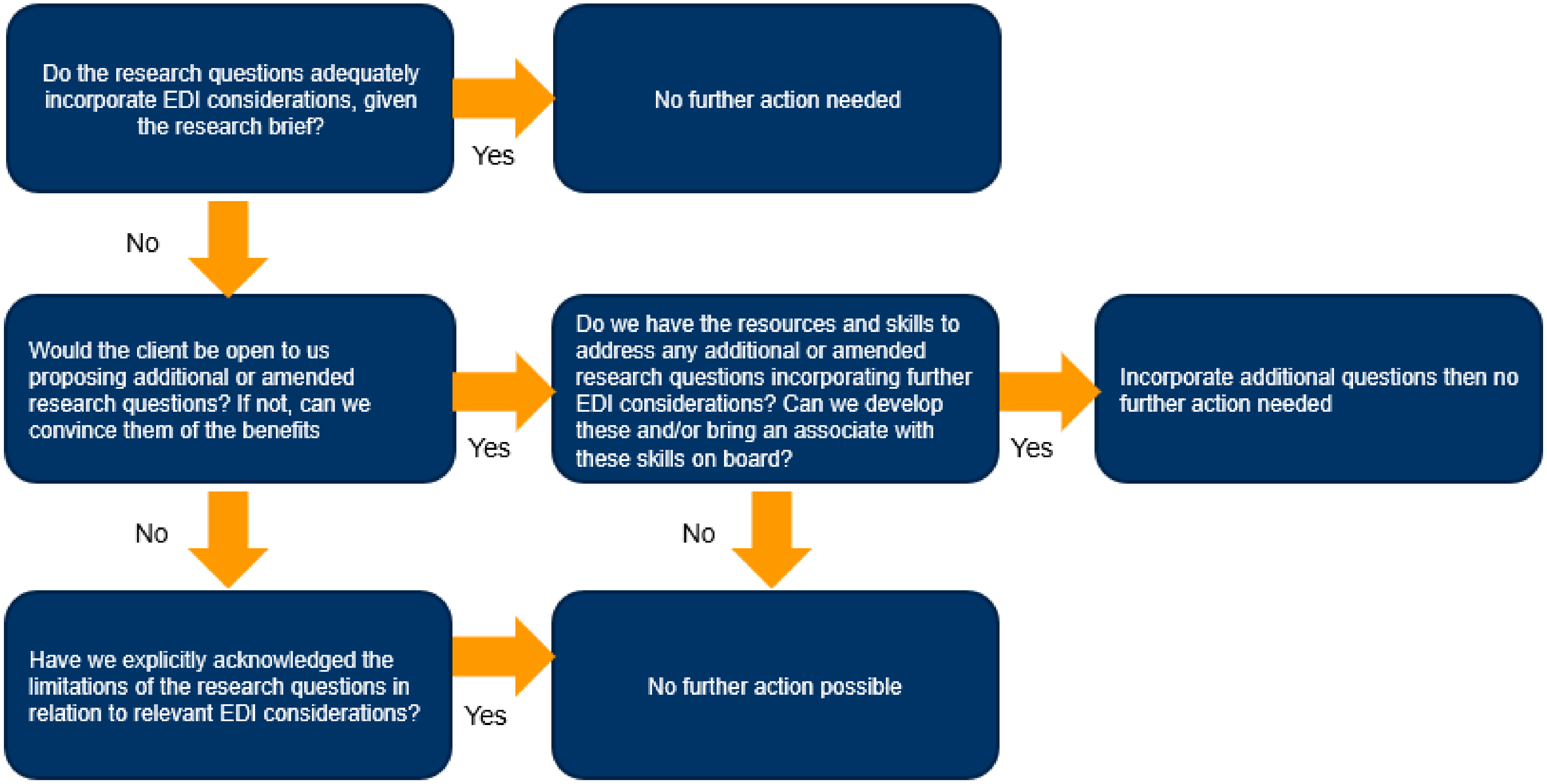
[3] The key considerations for developing evaluation frameworks overlap substantially with the key considerations for producing research questions, selecting fieldwork methods, and data collection and analysis. Please see Tool 1, Tool 3 and Tool 6 for guidance on these aspects.

Figure 2: Decision making tool for when research questions are provided by the client



Do the research questions adequately incorporate EDI considerations, given the research brief?

Yes → No further action needed

No ↓

Would the client be open to us proposing additional or amended research questions? If not, can we convince them of the benefits

Yes → Do we have the resources and skills to address any additional or amended research questions incorporating further EDI considerations? Can we develop these and/or bring an associate with these skills on board?

Yes → Incorporate additional questions then no further action needed

No ↓ No further action possible

No ↓

Have we explicitly acknowledged the limitations of the research questions in relation to relevant EDI considerations?

Yes → No further action possible

2 Tool 2: Involving people with lived experience in the research design and delivery process

2.1 What the guidance says

Defining co-production

Co-production is a way of meaningfully inviting different groups who are relevant to the research topic (including those with lived experience) to shape and inform the research. This includes involvement in all elements of the research design and delivery process, including (Involve 2018):

- Identifying research questions.
- Design and priority setting.
- Co-delivery of research activities.
- Communication of key findings.
- Involvement in knowledge exchange.

A note on language

It is often not feasible to achieve “true” co-production. This will likely depend on the project brief and context, and the input of people with lived experience in the research design and/or proposal stage. Therefore, this tool uses the term “involving people with lived experience” and explores steps we can take towards co-production in our projects.

Involve (2018) guidance outlines the following key principles for involving people with lived experience in the research process:

- **Shared power and responsibility.** The research is jointly owned, and people work together to achieve a joint understanding. It is a participatory and user-led experience which ensures it shares power equitably. This does not mean that everyone is involved in all decisions, but that there is joint ownership of key decisions and that people work with a shared understanding with defined roles and responsibilities.

- **Including all relevant perspectives and skills.** All necessary views, experiences, skills and knowledge are included in the research team. This includes several potential types of expert, which may include people with lived experience and practitioners or staff members. It is also important to include a range of lived experience within the research team to ensure the consideration of varied perspectives. As part of this, it is important to consider access to necessary support and/or training that might be required to ensure that everyone with relevant perspectives and skills can participate effectively.

- **Respecting and valuing the knowledge of all those working together on the research,** i.e. everyone is of equal importance and recognised as an asset. Co-production requires that different knowledge bases, experiences and perspectives are afforded equal respect and value.

- **Reciprocity,** such that everyone benefits from working together. This may include fair and flexible compensation, but also development of social networks, increased confidence, new knowledge and skills and access to courses and training.

- **Building and maintaining relationships.** An emphasis on relationships is key to sharing power. There needs to be joint understanding and consensus over roles and responsibilities. It is important to set clear expectations around co-production. Not only it is vital to outline how the research team will support people with lived experience to understand what is expected of them, but it is important for individuals with lived experience to set out their expectations of their involvement in the research team.

Involve (2018) guidance also states the following, non-exhaustive key features of co-produced research:

- Establishing ground rules.

- Ongoing dialogue.

- Joint ownership of key decisions.

- A commitment to relationship building.

- Opportunities for personal growth and development.

- Flexibility.

- Valuing and evaluating the impact of co-producing research.

Useful resources: Guidance on co-producing research

Involve and the National Institute for Health Research (NIHR) have a number of resources with additional information on the key features of involving people with lived experience in the research process. These can be accessed by clicking the following links:

- Guidance on co-producing a research project (Involve 2018), available here.
- Briefing notes for researchers: public involvement in NHS, public health and social care research (Involve 2012a), available here.
- A practical guide to being inclusive in public involvement in health research (Involve 2020), available here.
- Involving children and young people in research: top tips and essential key issues for researchers (Involve 2019), available here.
- Developing training and support for public involvement in research (Involve 2012b), available here.

2.2 Feasibility of involving people with lived experience in the research process

Attempting co-production: Views of experts by experience we have worked with

Co-production with people with lived experience is important and valuable. It is also potentially resource-intensive and can entail a range of practical challenges. Findings from some of our evaluative work on multiple disadvantage (for the MEAM Approach, Blackpool Fulfilling Lives and for Changing Futures) indicates that those involved in programme design and delivery can be hesitant to embark on co-production because of a fear that they won't get it "right". These same anxieties might also apply to the Cordis Bright team.

However, conversations with experts by experience who have been involved in the MEAM Approach evaluation team and with people with lived experience involved in the National Expert Citizens' Group facilitated by Revolving Doors suggest that experts by experience recognise these challenges. They have fed back that attempting co-production (or, at the very least, involvement) is generally better than not doing so, and that as long as we use the principles above we can create something meaningful to those involved.

2.2.1 Co-production ladder

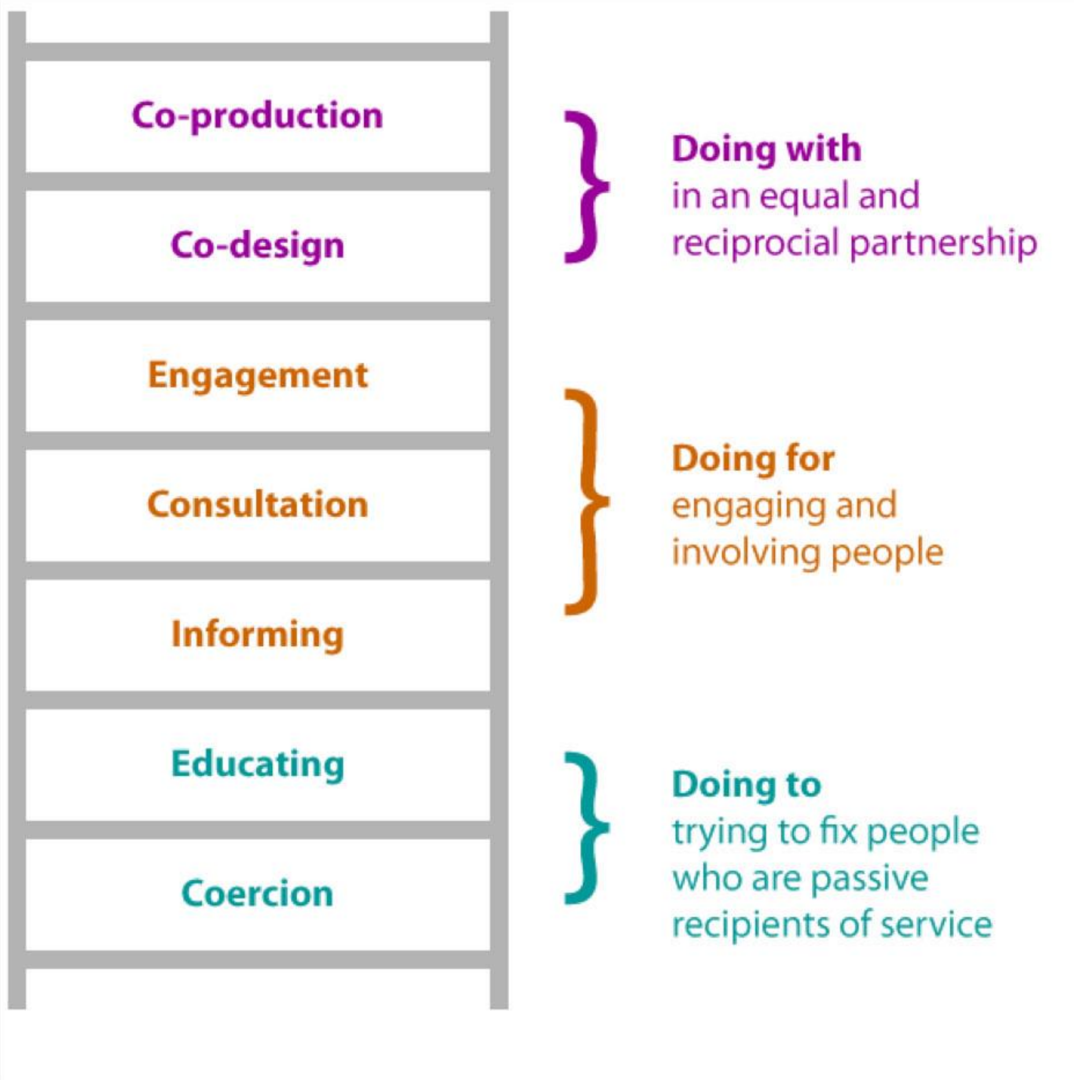
When thinking about involving people with lived experience in the research process, it can be helpful to refer to the co-production ladder (Figure 3). This was created by members of Think Local Act Personal's National Co-production Advisory Group (NCAG) and describes a series of steps towards co-production, which might also include co-production in a research context (NCAG 2022).

If it is not feasible to achieve "true" co-production within a research project (i.e. if people with lived experience have not been involved in the research design and/or proposal stage), we can consider consulting or engaging people with lived experience, and moving up the ladder from there. This may involve making use of existing steering groups or known networks of people with lived experience, and can include involvement in any or all of the following tasks:

- Sense checking and reviewing the proposed research design.
- Designing and/or reviewing research tools.
- Conducting fieldwork.
- Conducting and/or reviewing analysis and reporting.
- Producing and/or sense checking key findings and recommendations.
- Designing and/or reviewing dissemination plans, and involvement with dissemination strategies.

Tasks that involve sense checking and/or reviewing typically fall under consultation and engagement, while tasks that involve designing the research, conducting fieldwork and producing analysis move higher up the co-production ladder. It is important to be reflective of where we fall on the co-production ladder, adapt our language accordingly, and acknowledge any barriers and limitations when reporting on our methodology.

Figure 3: The ladder of coproduction



Source: National Co-production Advisory Group (2022) [Last accessed 11/11/2022]

2.2.2 Costings

Involving people with lived experience within the research design and delivery process can be resource intensive. Where we have attempted co-production in previous research projects, we have typically underestimated the required time and cost. Where possible, if the project brief specifies co-producing a project, it is important to build in sufficient time and resource at each stage to enable this to be done meaningfully. This can include ensuring that there is sufficient resource for the following tasks:

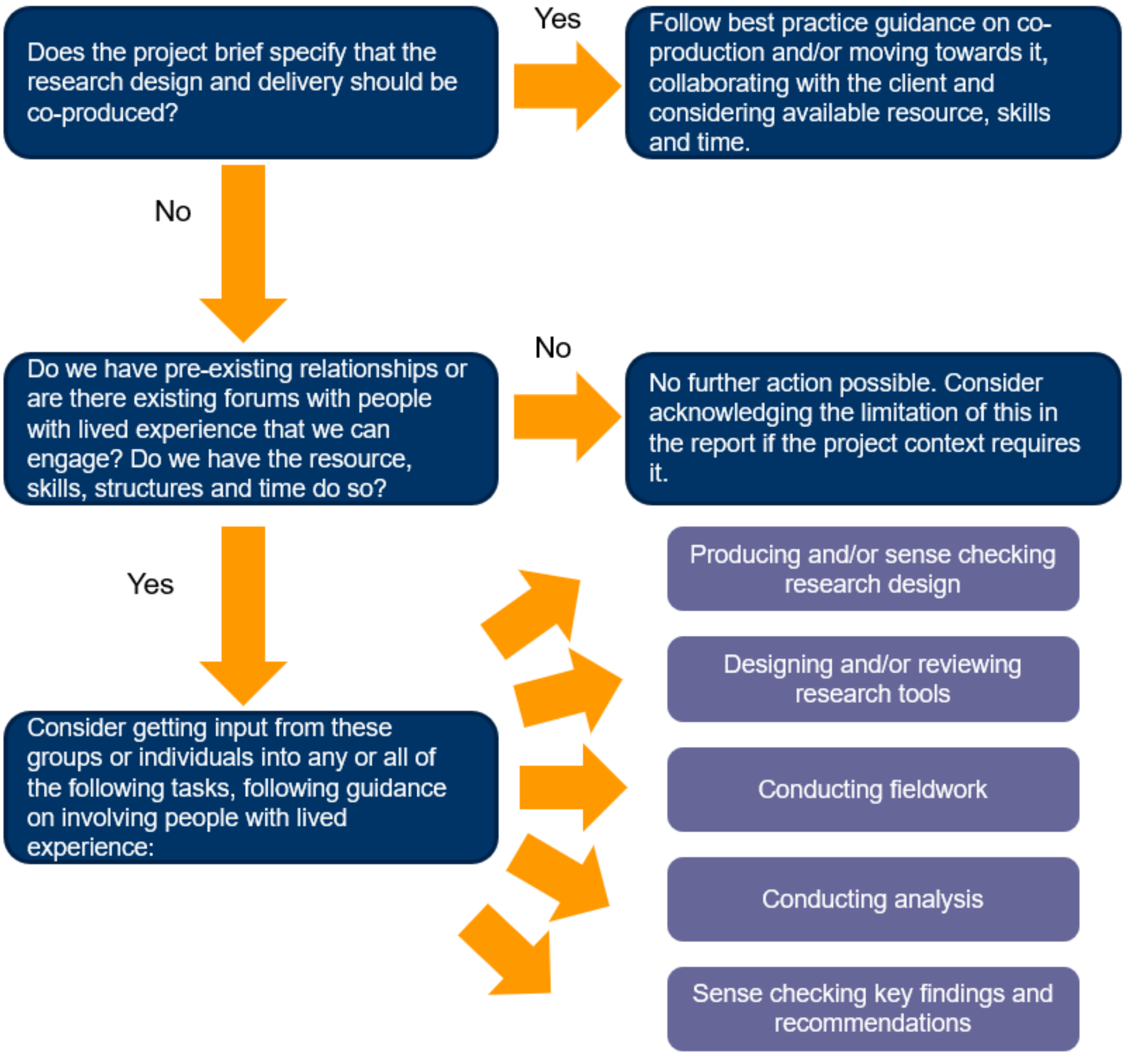
- Recruiting people with lived experience, including organising and conducting recruitment for people with relevant insight or working with other organisations with expertise in this area.

- Delivering research methods training and support.
- Co-conducting fieldwork, including time either side of consultation for support and de-briefs.
- Building in sufficient time to discuss and incorporate feedback on outputs, including on research tools, analysis, and reports.
- Costing and arranging disbursements, including financial compensation for time and any expenses incurred.

2.3 Decision making tool

Figure 4 presents a decision making tool for assessing the feasibility of involving people with lived experience in research design and delivery.

Figure 4: Decision making tool for involving people with lived experience in research design and delivery



3 Tool 3: Fieldwork method selection and delivery

3.1 What the guidance says

There are several key considerations highlighted by toolkits and guidance when selecting and delivering method types. Generally, guidance suggests the following key considerations when selecting between qualitative and quantitative methods:

- Will our selected methods allow us to draw upon a range of perspectives and experiences (NSERC 2022)?
- Do our methods enable us to address the EDI characteristics, circumstances and needs specified by the research questions (NIHR 2021)?
- How will we measure how the impact, costs and benefits of the intervention are distributed across different groups (For Equity 2022)?
- Have we considered the potential for bias and exclusion in each of our chosen research methods? How can we mitigate this (Farooqui et al 2018)?

The Magenta Book (2020) highlights the following rationale for use of both qualitative and quantitative methods across all research and evaluation:

- **Qualitative methods.** Qualitative data collection methods provide an in-depth understanding of behaviours, perceptions and underlying reasons for social phenomena. While quantitative methods are usually used to measure the 'what', qualitative methods are most often used to explore the 'how' and 'why'. Qualitative methods are more flexible than quantitative, and can be particularly valuable in understanding the views and experiences of minoritised groups, as they provide participants with the freedom to share their experiences, and do not require large sample sizes to draw conclusions (GSR Profession 2022).
- **Quantitative methods.** Quantitative data collection methods allow more systematic analysis of the prevalence of a certain need, access or outcome. Quantitative methods can measure the extent, prevalence, size and strength of observed characteristics; the differences, relationships and associations between groups; and can determine the importance of EDI factors in influencing outcomes. The use of standardised procedures and questioning also enables the reproducibility of results more widely.

In general, most research and evaluation should use a mixed methods approach to enable them to examine a range of research questions. This also applies to research questions which specifically examine EDI considerations (NSERC 2022). We typically use a mixed methods approach at Cordis Bright, and recognise that single methods are unlikely to provide comprehensive answers to our research questions. In doing so, we aim to combine quantitative and qualitative methods to both capture the voices and experiences of minoritised groups, as well as conducting more systematic analysis.

However, these decisions also need to consider the project brief and available time and resource. If these are limited, questions and methods will have to be prioritised and tradeoffs between methods will need to be made (Magenta Book 2020). These should be discussed and decided in collaboration with our clients.

Figure 5 presents key considerations for selection and delivery highlighted by toolkits and guidance for each type of fieldwork method. Potential barriers to participation in research which relate to EDI considerations are discussed in further detail in Tool 5. Data collection and quantitative analysis is addressed separately in Tool 6.[4]

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[4] The key considerations for conducting evidence reviews overlap substantially with the key considerations for producing research questions and reporting findings. Please see Tool 1 and Tool 7 for guidance on these aspects.

Figure 5 Key considerations for fieldwork method selection and delivery

Method type	Description and key considerations	Source(s)
Surveys and questionnaires	• An effective method of obtaining information from a large number of participants. • Can provide both qualitative and quantitative data. • Can be disseminated via accessible formats, including post or translated versions. May require being run through verbally with a researcher in some cases. Additional guidance on designing accessible surveys and questionnaires for disabled people is available here. • Less useful for providing in-depth insight into an intervention. • There can be response-rate issues that decrease the quality and robustness of findings.	• Magenta Book (2020); NSERC (2022); Farooqui et al (2018); For Equity (2022); Disability Unit (2011).
Interviews and focus groups	• Can be used to elicit views and experiences of individuals involved in an intervention, including differences across groups with regards to access, experience and outcomes. • Can be used to collect in-depth insight about an intervention, exploring the "how and why" of patterns emerging in other data (such as quantitative monitoring data). • In-depth interviews can be used to collect data on individuals' personal histories, perspectives, and experiences. These are particularly appropriate when sensitive topics are being explored, or the issue being discussed is not well understood. • Focus groups can facilitate discussion and debate, allowing a range of views to be explored. • Can be resource intensive; requires time to conduct and analyse; does not provide numerical estimates; there may be risk of bias in the views collected. • Key accessibility considerations include using interviewers who can speak the same language as participants, are of the same gender, or have lived experience. Tool 5 includes more detail on overcoming barriers to research participation.	• Magenta Book (2020); NSERC (2022); Farooqui et al (2018); For Equity (2022); NIHR (2018).
Case studies	• In-depth investigation of a person, group or event within its real-world context. These are often longer-term, allowing for longitudinal qualitative analysis. • Participants are often purposively selected because they can reveal information about specific phenomenon or experiences.	• Magenta Book (2020); NSERC (2022); Farooqui et al (2018); For

Method type	Description and key considerations	Source(s)
	- Often uses multiple sources of evidence and data collection methods. Can be descriptive, exploratory or explanatory. - Can capture real-life situations in depth and detail and help understand complex phenomena. Works well in combination with or supplementing other methods, such as surveys. - Can be helpful for communicating to stakeholders which interventions have worked for particular groups in particular contexts. - It is difficult to generalise findings to different contexts, situations or broader social phenomena.	Equity (2022); NIHR (2018).
Ethnographic techniques	- Ethnography seeks to understand people and how they live in their cultural and physical environment. - Can allow for a deeper understanding of individual experience of an intervention. - Observation may help improve accuracy of other data by reducing bias arising from self-reporting by participants. - May enhance the participation of people with severe communication impairments. - Participants may still act differently if they know they are being observed (the ‘Hawthorn effect’), which can affect the accuracy of the data. - Resource-intensive and may have ethical implications, practical barriers and issues with generalisability.	- Disability Unit (2011); Magenta Book (2020); NSERC (2022); Farooqui et al (2018); For Equity (2022); NIHR (2018).

4 Tool 4: Sample selection and participant recruitment

4.1 What the guidance says

Toolkits and guidance identify the following key considerations for ensuring that sample selection and participant recruitment techniques take appropriate account of different EDI factors and do not disproportionately exclude certain groups (Farooqui et al 2018; NSERC 2022; For Equity 2022, Market Research Society 2024a):

- Is it necessary, proportionate and beneficial to sample on the basis of different demographic or identity characteristics (Market Research Society 2024a)?
- How can we ensure that research participants represent the EDI factors that are included in the research design (Farooqui et al 2018)?
- Does our sampling technique limit the ability to recruit from certain populations (For Equity 2022)?
- How can we build relationships with relevant people or organisations that can support us to access participants (Farooqui et al 2018)?
- What are the benefits and drawbacks of contacting community leaders or 'gatekeepers' to access particular communities or groups (Farooqui et al 2018)?

Figure 6 outlines a range of sampling techniques identified in the literature, which are commonly used across social research to ensure that target groups are reached (Business Research Methodology 2022).

Figure 6 Sampling techniques and definitions (Business Research Methodology 2022).

Sampling technique	Description
Non-probability sampling	
Snowballing	Asking existing participants to nominate others they know who may fit the recruitment criteria.
High penetration sampling	Sampling from areas where target groups represent a large proportion of the general population.
Convenience sampling	A convenience sample includes the individuals who happen to be most accessible to the researcher, to maximise engagement and timescales.
Voluntary response sampling	A voluntary response sample is also based on ease of access. Instead of the researcher choosing participants and directly contacting them, people volunteer themselves (e.g., by responding to a public online survey).

Sampling technique	Description
Purposive sampling	Purposive sampling, also known as judgmental, selective, or subjective sampling, is a form of non-probability sampling in which researchers rely on their own judgment when choosing members of the population to participate in their surveys.
Probability sampling	
Random sampling	Random sampling is a form of probability sampling where each member of the population is equally likely to be chosen as part of the sample. Selecting participants randomly removes bias and results in a more representative sample. However, this method requires a large sample size to result in a representative sample.
Stratified sampling	Stratified sampling attempts to make the sample as representative as possible of the population. The sample frame will be divided into a number of smaller groups based on EDI characteristics. Individuals are then drawn at random from within these groups. This ensures the sample represents the characteristics of the population.
Quota sampling	Quota sampling ensures that the sample fits a certain quota, for example that 30% of the sample are a specific gender.
Systematic sampling	In systematic sampling every Nth member of population is selected to be included in the sample.

Gatekeepers (Andoh-Arthur 2019)

Gatekeepers are commonly used to recruit research participants. They act as mediators who can facilitate access to participants within a target cohort whom researchers may otherwise struggle to reach. They can be people within organisations who have the power to grant or withhold access, or they can be people who may be invaluable for gaining access primarily due to their knowledge, connections with or membership in a research population. These can include, but are not limited to:

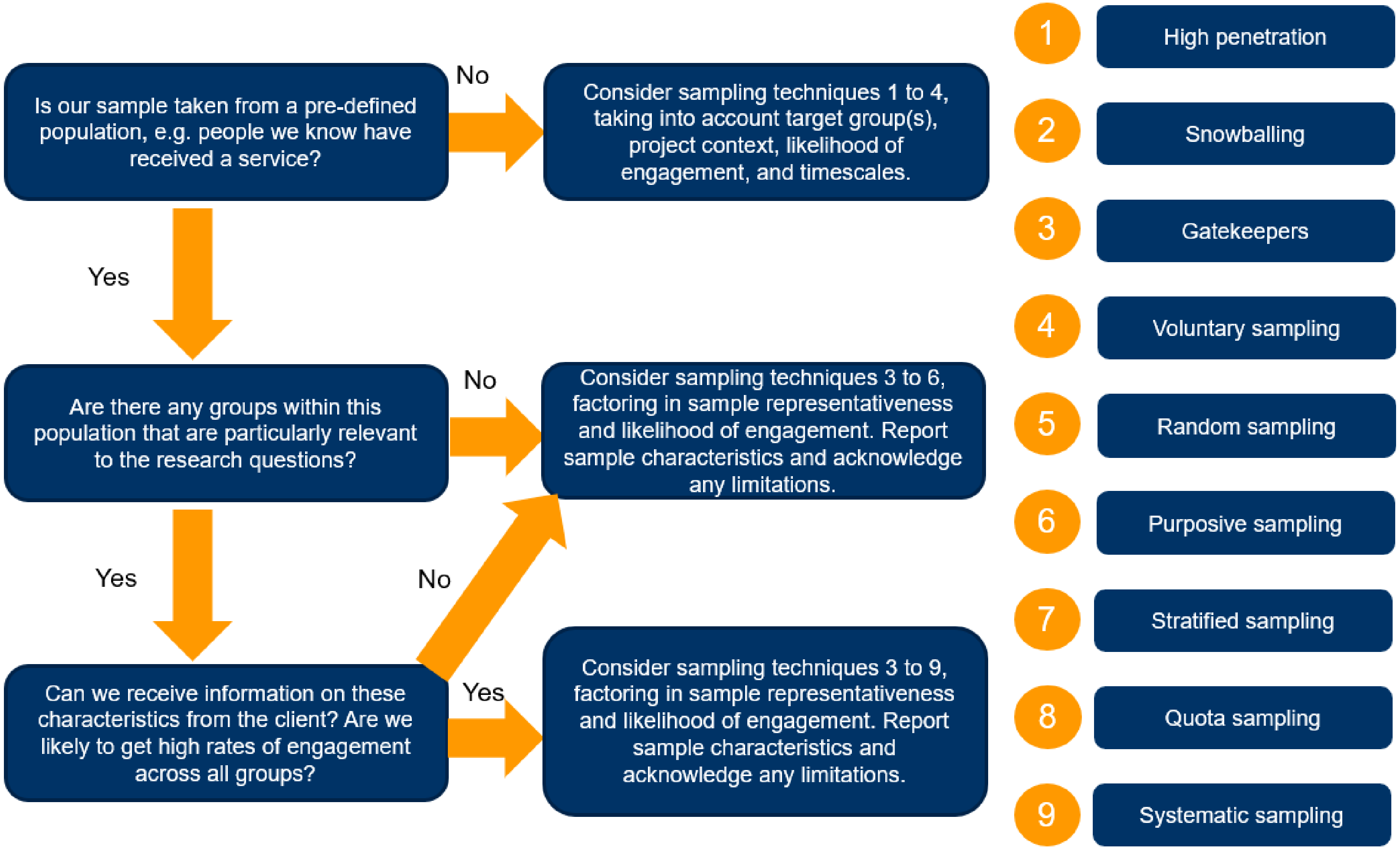
- Support workers and organisations.
- Faith organisations and leaders.
- Local voluntary and community organisations.
- Public sector organisations.
- Parents and carers and/or schools and teachers.

4.2 Decision making tool

The intended sample for our research and subsequent sampling techniques will be determined by the project brief. We often operate in one of two contexts: 1) where we have a pre-defined population who is known to the client, or 2) where the research is more exploratory, and the population is not currently known or accessible to us or our client.

Figure 7 presents a decision tool for sampling techniques that we can consider, either individually or in combination with each other, in each of these situations.

Figure 7: Decision tool for sample selection and participant recruitment



Is our sample taken from a pre-defined population, e.g. people we know have received a service?

No → Consider sampling techniques 1 to 4, taking into account target group(s), project context, likelihood of engagement, and timescales.

Yes ↓

Are there any groups within this population that are particularly relevant to the research questions?

No → Consider sampling techniques 3 to 6, factoring in sample representativeness and likelihood of engagement. Report sample characteristics and acknowledge any limitations.

Yes ↓

Can we receive information on these characteristics from the client? Are we likely to get high rates of engagement across all groups?

No → Consider sampling techniques 3 to 6, factoring in sample representativeness and likelihood of engagement. Report sample characteristics and acknowledge any limitations.

Yes → Consider sampling techniques 3 to 9, factoring in sample representativeness and likelihood of engagement. Report sample characteristics and acknowledge any limitations.

1. High penetration
2. Snowballing
3. Gatekeepers
4. Voluntary sampling
5. Random sampling
6. Purposive sampling
7. Stratified sampling
8. Quota sampling
9. Systematic sampling

5 Tool 5: Enabling research participation

5.1 What the guidance says

Toolkits and guidance identify the following key considerations for ascertaining whether there are research participants who may be disproportionately excluded from taking part (Farooqui et al 2018; NSERC 2022; For Equity 2022):

- Are there language, financial, physical access, digital or cultural barriers to participation? (Farooqui et al 2018).

- What different forms of support might be required to address potential barriers, and to ensure individuals and communities are able to meaningfully participate in research? (NSERC 2022)

- Have we considered the location of our study, how people will get to us, issues of transport, disability/access issues, comfort etc.? (Farooqui et al 2018)

Figure 8 below provides an overview of the most commonly identified barriers to participation in the literature, and some potential solutions (Disability Unit 2011; Farooqui et al 2018; For Equity 2022). However, there are a range of barriers to research participation, and these are likely to vary depending on the project, sector and individual circumstance of the participant (For Equity 2022).

Useful resource: Guidance on involving disabled people in social research

Government guidance on ensuring research is accessible to disabled people is available here (Disability Unit 2011).

5.2 Decision making tool

Where we can anticipate barriers to participation, we can build in solutions to these in our initial project design. For example, taking into account the costings and timescale implications of producing research tools in different formats and/or languages. It is therefore important to both try to anticipate the potential barriers in project design and delivery, but also to provide the option for participants to tell you what participation accessibility requirements they might have and agree solutions to these in collaboration with them.

Figure 9 presents a decision making tool to help guide these decisions.

Figure 8 Barriers to participation in research and potential solutions

Barrier to participation	Potential solutions	Source(s)
Financial	• Covering expenses, for example for transport or childcare. • Financial compensation for their time. We commonly provide £20 high street or Amazon vouchers to people who have received services as a thank you for participation, and to cover any opportunity costs to taking part.	Farooqui et al (2018)
Physical accessibility requirements	There are a range of physical accessibility requirements and these should be discussed on a case by case basis with the participant. Common examples include ensuring: • Physical venues are wheelchair accessible, with accessible parking nearby. • Sensory adjustments can be made, for example to overhead lighting or noise. • Introductory outputs such as information sheets are available in large font sizes, Easy Read formats, Braille or audio. • A range of virtual participation methods are offered, including MS Teams, Zoom or mobile phone calls.	Disability Unit (2011)[5]; HIAT (2022)
Digital exclusion	Provide a range of options to take part in the research. This can include: • In-person consultation. • Consultation via mobile phone. • For surveys and questionnaires, consider providing the option to return a copy via post.	Farooqui et al (2018); Disability Unit (2011)

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[5] Disability Unit was known in 2011 as the Office for Disability Issues.

Barrier to participation	Potential solutions	Source(s)
Language and literacy	• If possible, use of a translator or interviewer who speaks the participant's first language. This may also include a British Sign Language interpreter for deaf participants. • Ensure all accompanying written outputs, such as information sheets, can either be translated verbally or in written form. • It is also important to ensure that the vocabulary, structures and framing used when communicating with or about prospective participants do not exclude or alienate them. For example, avoid using jargon, contested terminology, unnecessarily complicated language or language which might be perceived as biased. In some cases, it may also be helpful to adopt more informal language or terms which are commonly used by participants. This includes modifying your language during discussions based on how participants are framing things. • Use straightforward language and simple sentence structures to make it easier for people with limited literacy skills to participate. For information in written formats, participants with literacy barriers may require audio outputs or working through a survey in person with the researcher or support worker.[6]	Farooqui et al (2018); For Equity (2022)
Additional barriers	• Interviewers with the same characteristics as participants may be required for some groups or research topics (e.g. interviewers with the same gender or same ethnic background). • Link workers, advocacy workers or local faith or community leaders may be required to act as a gateway to reach some groups that researchers themselves might be less able to reach. Their presence in interviews and focus groups may also help to build trust and rapport. • Researchers with lived experience may find that disclosing this helps to build trust, confidence and rapport between participants and researchers.	Farooqui et al (2018)

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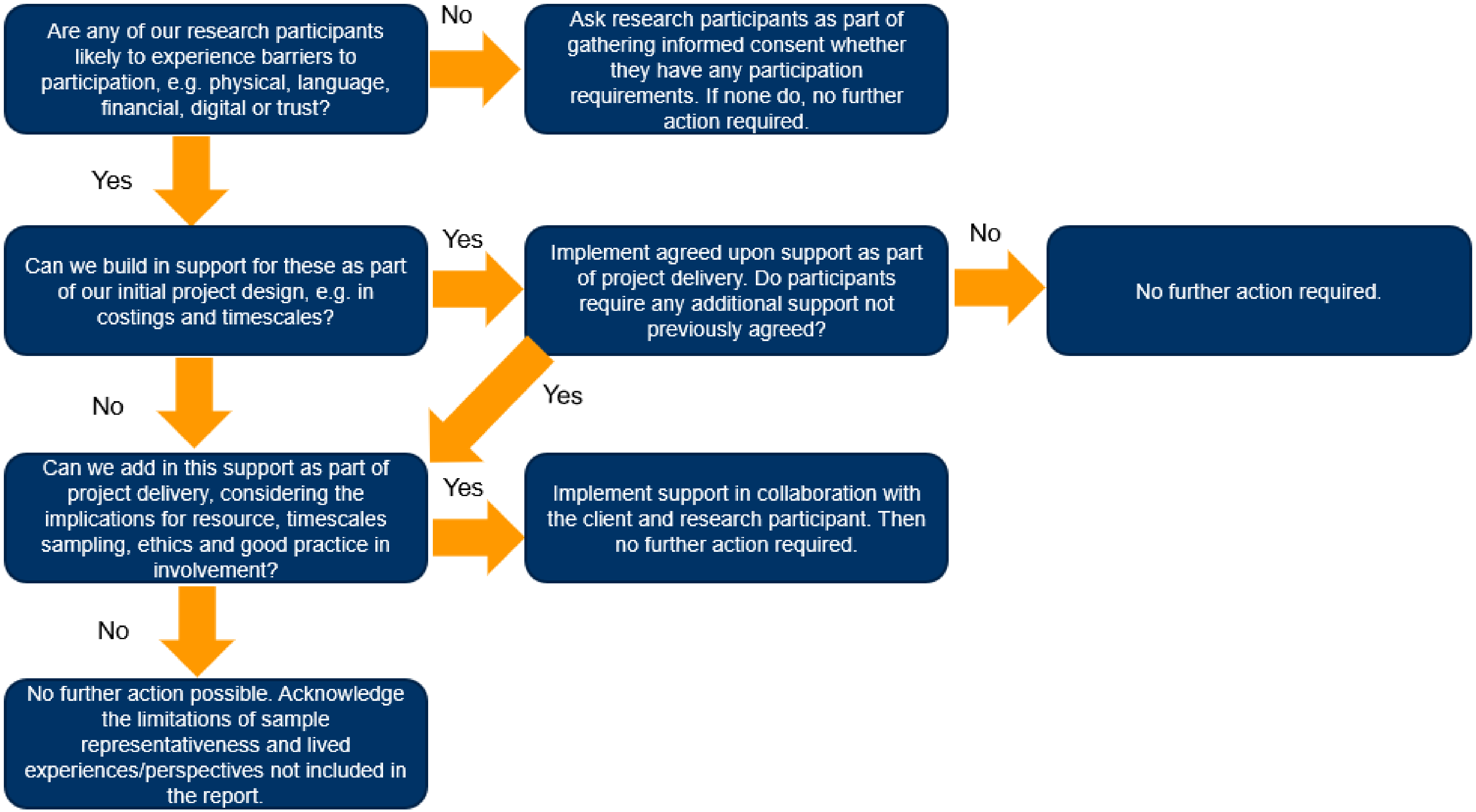
[6] Limited literacy skills are relatively common place amongst adults in England. According to the National Literacy Trust, 16.4% of adults in England can be described as having "very poor literacy skills", meaning that they may have problems with reading information from unfamiliar sources or on unfamiliar topics.

Figure 9: Decision making tool for addressing barriers to research participation



6 Tool 6: Monitoring and outcomes data collection and analysis

6.1 What the guidance says

6.1.1 Data collection

Guidance and toolkits suggest the following key considerations for collecting data on EDI factors and characteristics:

- Which EDI characteristics are relevant and important for us to collect data on? Which categories will we use to record these, and how will we obtain this information (NIHR 2018)?
- Can we ensure sufficient sample sizes are collected to enable 1) subgroup analysis and 2) analysis of intersections of characteristics (NSERC 2022)?
- If our analysis is based on existing data sets, is there potential for bias due to the context in which the data was generated? Are any groups less likely to be represented in this dataset (NSERC 2022)?

ONS (2018) guidance on collecting data on EDI characteristics lists the following key principles:

- **Standardised categories.** It is important to use standardised categories when collecting data on EDI characteristics to aid analysis. It is generally considered best practice to use the ONS harmonised questions for protected characteristics, to ensure that analysis is comparable.

Useful resource: Data harmonisation standards

The current harmonisation standards for categories for EDI characteristics can be found on the Government Statistical Service and Statistician Group website here.

- **Self-reported.** Data on EDI characteristics should be self-reported by individuals, and not assigned or assumed based on appearances. This applies for all EDI characteristics.
- **Individual level data.** Data on protected characteristics should be collected at the individual level, and ideally be linkable at the individual level to other data that is being collected for the research (for example on access, service use or outcomes), to enable subgroup analysis.

In practice, data collection for our projects often involves compromise, and working with imperfect or incomplete data. Where it has not been possible to collect data in line with the key principles outlined above, it is important to acknowledge the potential limitations of the data we are working with. It may also be useful to reflect on how data collection processes could be improved in future to better incorporate these principles, and reflect this in our findings and recommendations.

6.1.2 Data analysis

Guidance and toolkits suggest the following key considerations for analysing data on EDI factors and characteristics:

- Have we presented descriptive statistics of the EDI characteristics in our sample? Have we considered benchmarking this against population level data (NSERC 2022)?
- Which EDI characteristics might be important to focus on in our analysis, and which methods might be most appropriate to do that (Farooqui et al 2018)?
- Are sample sizes large enough to present data disaggregated by EDI factors? Can we examine differences in outcomes across different groups? If not, have we acknowledged the limitations of that (NSERC 2022)?
- Are sample sizes large enough to allow analysis of intersections of EDI factors? If not, have we acknowledged the limitations of that (UKRI 2022)?
- Can we statistically test data to determine whether EDI factors result in significant differences between groups (For Equity 2022)?

There are a range of quantitative methods that can be used to incorporate EDI considerations into analysis and reporting. These should be selected considering the project brief, data quality, sample sizes, and the available time, resource and skills. These methods include:

- **Descriptive statistics,** including frequency tables and ranges of the EDI characteristics collected within the data sample. This can also be compared against population level benchmarks, to assess how representative the dataset is (NSERC 2022).
- **Cross tabulation (i.e. subgroup analysis).** This includes breaking down outcome variables by the data categories within an EDI characteristic to analyse whether outcomes vary by group (NSERC 2022). To determine whether you have sufficient sample sizes to conduct subgroup analysis, you can conduct a power analysis (GSR 2022). Additional guidance on how to conduct this is available here (Burke et al. 2015) and here (Breck and Wakar 2021).
- **Statistical significance testing.** If sample sizes are large enough to conduct subgroup analysis, the statistical significance of differences across groups can be analysed using the appropriate statistical test (HIAT 2022).

Useful resource: Statistical significance testing

Guidance on the appropriate statistical significance test based on the type of data you have is available here (Gunawardena 2011).

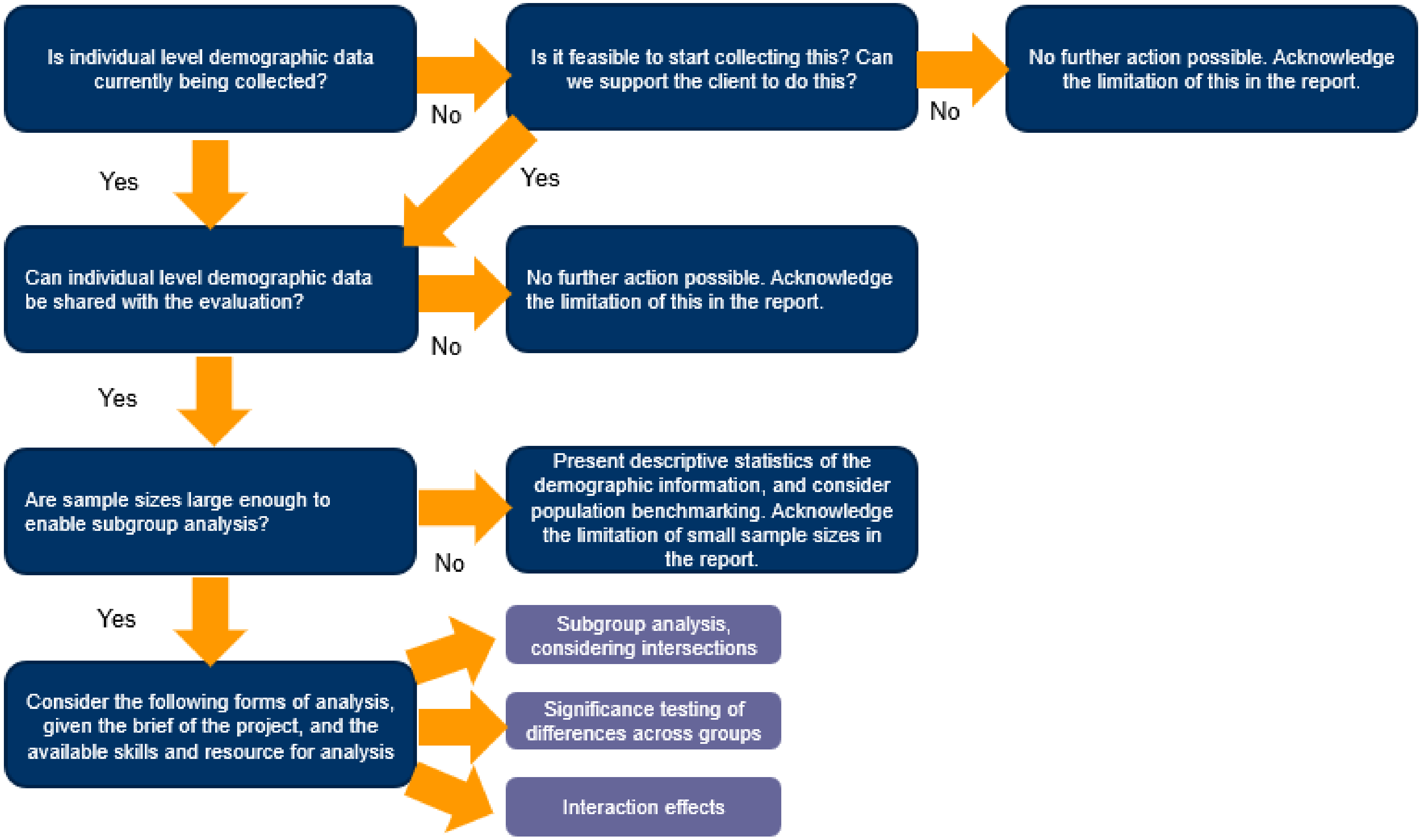
- **Interaction effects.** If sample sizes are large enough and data is robust enough to do multiple regression analysis, interaction effects can be used to examine intersectionality, i.e. the impact on those who may experience discrimination and disadvantage through the interaction of multiple EDI characteristics (ONS 2018).

When reporting quantitative analysis, it is important to report at the lowest disaggregated level possible, to avoid over-generalisations and drawing conclusions that are not supported by the data, and to facilitate intra-group comparisons where possible (GSR 2022). Additional guidance on reporting ethnicity data categories can be found here (Race Disparity Unit 2020). See Tool 7 for additional guidance on analysis and reporting.

6.2 Decision making tool

The quantitative analysis we are able to conduct that incorporates EDI considerations is often limited by the quality of the data that is collected and/or is available to be shared with us. Figure 10 below presents a decision making tool for use in these situations.

Figure 10 Decision making tool for data collection and quantitative analysis



7 Tool 7: Reporting and analysis

7.1 What the guidance says

Toolkits and guidance identify the following key considerations for reporting key findings related to EDI considerations (Farooqui et al 2018; NSERC 2022; For Equity 2022):

- Are we clear and consistent in the language we are using to discuss each EDI factor (NSERC 2022)?
- Are we as specific as possible when discussing groups? For example, can we report the ethnic backgrounds that our findings relate to rather than using aggregated ethnic groups (Farooqui et al 2018)?
- Have we acknowledged heterogeneity within and intersectionality between groups, and the fact there are likely to be differences in experience within groups as well as between them (Farooqui et al 2018)?
- If we experienced barriers to incorporating EDI considerations into project design and delivery, have we acknowledged the limitations of this (NSERC 2022)?
- If relevant EDI factors were not examined, have we discussed the implications of that on the interpretation of results (For Equity 2022)?

Useful resources: Guidance on writing about EDI characteristics

Guidance on writing about different EDI characteristics can found by accessing the following links:

- Diversity and Inclusion Best Practice Guides: Use of Language (Market Research Society 2024b), available here.
- A guide to creating inclusive content and language (NIHR 2021), available here.
- Writing about ethnicity (HM Government 2021), available here.
- Inclusive language: words to use and avoid when writing about disability (Disability Unit 2021), available here.
- Our principles for language and writing (Early Intervention Foundation 2022), available here.

Early Intervention Foundation (2022) states several key principles for analysis and reporting that consider EDI considerations. These principles were developed to refer to writing and reporting findings relating to ethnicity and early intervention; however, they also apply to reporting on all EDI factors in each of the sectors that we operate in. These principles are:

- **Be transparent.** Be open and transparent about sources of data and evidence relating to EDI factors and related inequalities, and about any important considerations relating to how data has been used in other studies. This could include where broad conclusions about groups have been drawn from data relating to smaller sub-groups. Be as transparent as possible about the limitations of findings and conclusions, particularly where these limitations centre on a lack of evidence or data relating to different groups.

- **Be specific**. Use language that recognises the heterogeneity within groups, and which reflects the nature of the data sample or research population being reported on. Report at the most granular level allowed by the data, and avoid drawing conclusions about aggregated groups unless the data supports it.

- **Be respectful**. Where possible, use the terms and language that people have chosen to refer to themselves as, and avoid terms they have rejected. This includes names, spelling, pronouns and other terms that people may use to identify themselves.

- **Acknowledge complexity and intersectionality.** There is considerable diversity both between and within groups. Avoid oversimplifying and overgeneralising where possible. Outcomes and experiences are determined by a multitude of factors overlapping in complex and interrelated ways. Avoid addressing issues relating to one EDI factor in isolation from other EDI factors, i.e. acknowledge intersections wherever possible.

- **Identify disparities and inequalities**. Do not shy away from identifying and drawing attention to disparities and inequalities between groups, where this is what the data or evidence suggests.

- **Highlight evidence gaps.** When using existing data or analysis, explicitly acknowledge cases where ethnic groups have not been sufficiently well sampled to allow conclusions to be drawn, or where specific groups are underrepresented in the study. Identify gaps where insufficient evidence or data has been gathered to understand the experiences or outcomes of a group, and call for further research to fill these gaps.

- **Actively reflect on past work.** Actively reflect on the language and categories used in previous research and reports, both internal and external. Where appropriate, do not reuse the language of the original research, and be transparent about when and why you have made these changes.

8 Tool 8: Disseminating findings and producing outputs

8.1 What the guidance says

8.1.1 Dissemination strategies

Dissemination strategies often go hand in hand with decisions surrounding output formats. Guidance and toolkits highlight the following key considerations for deciding how to disseminate key findings and outputs:

- What means of dissemination will be most effective in reaching those who will use and/or could benefit from the findings (NSERC 2022)?
- Are dissemination strategies the product of collaborative input (NSERC 2022)? How and where can we do this to increase reach (NSERC 2022)?
- Will anyone who took part in the research receive a copy of the report, a summary of the research findings, or be invited to a presentation about the work (NSERC 2022)?
- How can this research be taken forward to benefit programme beneficiaries (NIHR 2018)?
- Should findings be disseminated via accessible and inclusive formats (Farooqui et al 2018)?
- Have we thought about the most effective ways we can share what we have learned with the wider sector (For Equity 2022)?

It is good practice to agree the evaluation use and dissemination plan as early as possible in delivery timescales, in collaboration with both the client and as wide a range of stakeholders as possible. Once different audiences and their evidence needs are known and prioritised, reporting and communications should be tailored to meet these needs. This is important to improve the usability of findings and help your intended audience to understand how findings directly relate to their areas of interest (Magenta Book 2020).

The Magenta Book (2020) highlights the following key considerations when coming up with an evaluation use and dissemination plan:

- **Which groups?** All potential groups and their needs should be actively considered to avoid missing key stakeholders with their own set of needs. It is particularly important to consider the groups who have contributed to the research and the ways in which you can share the findings with them (Farooqui et al 2018). A stakeholder mapping exercise can be useful to do this.
- **What information?** This should be informed by the evaluation questions and intended audience.

- **Which point in time?** It is likely that there will be key decision points throughout the delivery of the intervention and/or research project which will benefit from emerging or interim key findings, as well as at the end of the research period. It is important to discuss these potential timings with the client and key stakeholders as early as possible in delivery timescales to maximise the benefits of the findings.

- **For what purpose?** This should also be decided in the evaluation design stage, be continuously reflected on and developed iteratively in collaboration with key stakeholders.

Dissemination plans should cover **what** will be published, **when** it will be published, and **which** communication tools will be used. These tools include but are not limited to:

- Printed formats.
- Social media.
- Seminar and conference presentations.
- Community radio stations.
- Posters and leaflets in local areas.
- Publication via newsletters.

Decisions regarding dissemination strategies and project outputs will of course have resource implications for a project. Wherever possible, consideration of the potential scope and scale of outputs and dissemination should be part of costing a project. Where resourcing constraints negatively impact on a project's ability to disseminate findings in line with the above guidance, use the post-project reflection (see Tool 9) to discuss this as a project team and consider how future projects could better take this into account. Sharing these learnings and reflections with the wider team will help us to improve the accessibility of our outputs in future.

Section 8.1.2 below provides more information on potential output formats.

8.1.2 Producing outputs

Toolkits and guidance emphasise that it is important to consider which output formats might be the most appropriate and accessible given your intended audience (Farooqui et al 2018; NSERC 2022; For Equity 2022). This includes both the writing style you use, and the output formats that are used to disseminate findings.

Writing style

It is good practice to build the following key principles into the writing style that is used across all outputs, regardless of their format or intended audience (Disability Unit 2021):

- **Write in plain language**. Use simple language and short sentences that avoid unnecessary jargon, acronyms or the passive tense. Government Digital Service

(2016) has a list of words to avoid using when writing in plain English. These are available here.

- **Be concise.** If you need to present a large amount of text, consider breaking it up into a bulleted list.
- **Make it as legible as possible.** Ensure that all font sizes (including in graphs or images) are large enough to be read, and in a font style that is clear.
- **Use a simple document structure.** Use in-built styles for headings, bullet points and tables to aid screen readers and navigation.

Accessible output formats

There are several printed format types that increase the accessibility of outputs such as reports and key findings (Central Digital and Data Office 2020):

- **Summary versions.** Summary versions should include the key points of the research and provide signposts for further information. These help to make the key findings more digestible.
- **Accessible PDFs.** PDFs can be made accessible, i.e. so that they pass the Adobe Accessibility Checker, through Microsoft Word. Clients increasingly specify that project outputs should pass the Adobe Accessibility Checker. Key elements of accessible PDFs include using minimum font size 12, including alt text, using simple tables with no merged cells, ensuring all headings are numbered, and including ‘tags’.

Useful resource: Producing accessible PDFs from Microsoft Word

Cordis Bright guidance on creating accessible PDFs can be found by clicking here.

- **HTML document formats.** HTML document versions use an individual’s custom browser settings, and are recommended as an accessible alternative to PDFs, which can be challenging to make accessible (Central Digital and Data Office 2020).
- **Easy read formats.** Easy read formats of outputs help people with learning disabilities or those who are not fluent in English understand information easily. Easy read formats provide the essential information on a topic and use pictures to support the meaning of text. Additional guidance on creating easy read formats is available here (Leeds and York Partnership 2022).
- **Clear and large print.** Clear and large print formats help to make documents accessible for people with visual impairments. Additional guidance on creating clear and large print can be found by clicking here (Sensory Trust 2022).

Additional formats that research and evaluation formats can be disseminated in include:

- **Condensed key findings,** including infographics, video outputs, newsletters, social media posts and conference presentations and seminars (Magenta Book 2020).

- **Communication formats that meet a range of accessibility needs.** These may also include audio formats, braille or using textphone (Central Digital and Data Office 2020).

Useful resource: Guidance on producing accessible communication formats

Government guidance on producing accessible communication formats for a range of needs is available here (Disability Unit 2021), here (Department of Health 2010), and here (Home Office 2016).

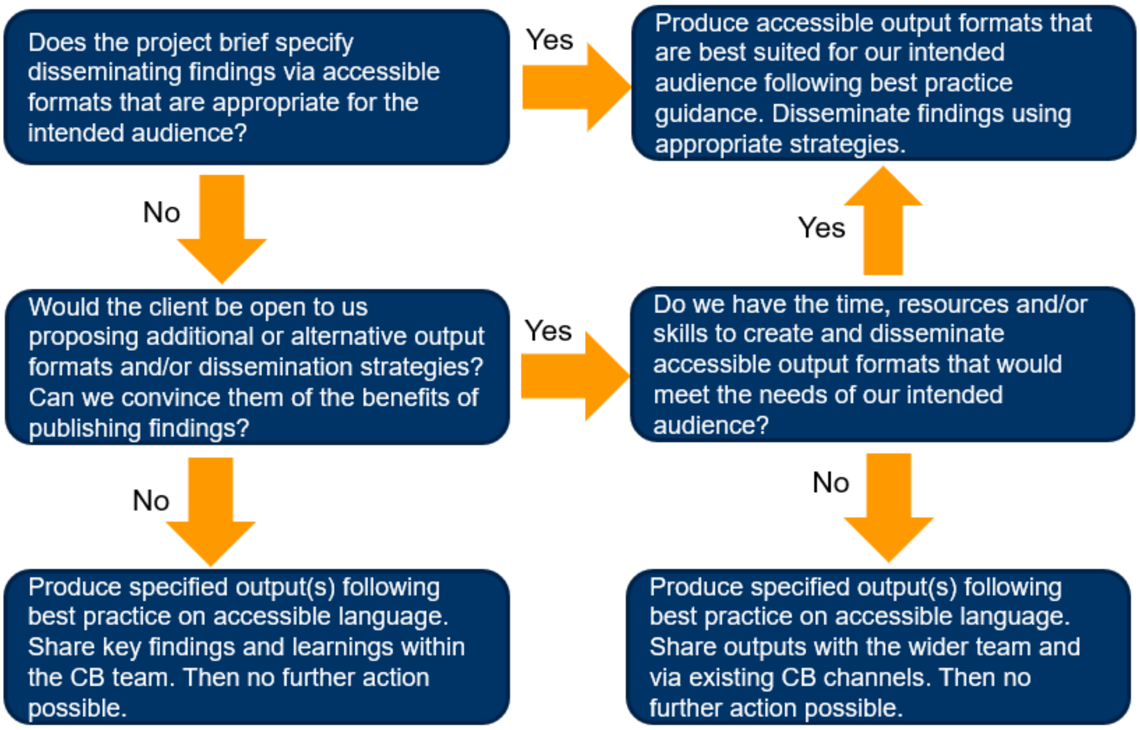
It is not cost effective to produce every output in every suggested format and language. The exact format(s) that are appropriate will depend on the intended audience and their specific needs and should be decided in collaboration with the client and your intended audience.

8.2 Decision making tool

The outputs we produce are usually determined by the original project brief and/or our clients' needs and priorities. These increasingly specify that outputs should be accessible and easily digestible, for example that reports should include a key findings summary or that PDF documents should pass the Adobe Accessibility Checker. However, if the project requirements do not specify that outputs should be accessible, we may be able to collaborate with clients to determine alternative or additional outputs that might be beneficial to disseminate findings.

Figure 11 presents a decision making tool that we can use in these situations.

Figure 11: Decision making tool for disseminating findings and producing accessible outputs



Does the project brief specify disseminating findings via accessible formats that are appropriate for the intended audience?

Yes

Produce accessible output formats that are best suited for our intended audience following best practice guidance. Disseminate findings using appropriate strategies.

No

Would the client be open to us proposing additional or alternative output formats and/or dissemination strategies? Can we convince them of the benefits of publishing findings?

Yes

Do we have the time, resources and/or skills to create and disseminate accessible output formats that would meet the needs of our intended audience?

Yes

No

Produce specified output(s) following best practice on accessible language. Share key findings and learnings within the CB team. Then no further action possible.

No

Produce specified output(s) following best practice on accessible language. Share outputs with the wider team and via existing CB channels. Then no further action possible.

9 Tool 9: Post project reflection

Questions and discussion points for post project debriefs

- How well did we do with EDI in this project?
- What were the key EDI considerations, and how well were we able to incorporate them into the project design and delivery?
- What, if any, were the barriers or constraints that we encountered? Were we able to overcome these, and if so how? If not, what were the implications for our findings and how did we acknowledge this?
- What would we have done differently if we were to start the project again?
- What are the key learnings for projects in similar sectors, with similar EDI considerations, or that use similar methodologies? Can we share these with the wider team? Can we share this learning with other clients?

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