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Guide for More Equitable and Inclusive Knowledge Gathering

Centering People and Communities in Research and Evaluation

Acknowledgements

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About IREX

IREX is a global development and education organization. We strive for a more just, prosperous, and inclusive world in which individuals reach their full potential, governments serve their people, and communities thrive. We work with partners in more than 100 countries in four areas essential to progress: cultivating leaders, empowering youth, strengthening institutions, and increasing access to quality education and information. Learn more: www.irex.org.

About IREX's Center for Applied Learning and Impact

IREX's Center for Applied Learning and Impact is a dedicated space for learning and innovation that collaborates across IREX and with external partners to carry out research, evaluation and learning and develop cutting-edge new approaches.

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I. Introduction

Purpose

This guide is a practical tool to increase equity and inclusion in **knowledge-gathering activities**, which, at many global development organizations, most commonly include **research and evaluation**. This guide can inform the development of **knowledge products**, such as **learning briefs** or **case studies**, and a range of other products (see column to the right). This guide can be used to initiate conversations and efforts to bring information-gathering activities into better alignment with commitments to equity and inclusion.

Who is this for?

As a practical resource, this guide is intended for diverse global development program teams that engage in various knowledge-gathering activities and create knowledge products to meet their program goals and organizational missions.

Where did the ideas in the guide come from?

To create the guide, we first looked to the literature to better understand scholar and practitioner conversations around current challenges and opportunities that exist in terms of equity and inclusion within research and evaluation: what we are now calling knowledge gathering. We then developed interview guides to engage IREX staff globally to learn from their direct experiences with these challenges and opportunities. We invited additional IREX staff to review and challenge our product. The guide was developed using our review of the literature along with input and insights from these conversations with IREX staff.

Limitations of this document

This guide was developed by an organization from the global north, so it is necessarily colored by our background and relative position of power. We do not believe that the long-standing precedents that underpin structural knowledge inequities can be resolved by a guide alone. However, we do believe that by bringing these considerations to light, we can all continuously strive to be more equitable and inclusive across all phases of our knowledge-gathering processes. It is an important step toward the organization we want to be.

Knowledge gathering

Seeking, compiling, processing, interpreting, sharing, and using knowledge as a foundation for action. We are using the term knowledge gathering as an umbrella term that includes research, evaluation, and other less formal practices to signal that we overtly strive to transform inequitable power structures of the past and embrace inclusive and just practices.

Knowledge products can include:

- Reports
- Case studies
- Learning briefs
- Measurements
- Analysis
- Facts
- Opinion pieces
- Stories
- Poetry
- Visual imagery
- Community visual or performing arts projects

and can result in:

- Improved programs, services, and development processes
- Dialogue
- Strengthened relationships

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II. How to Navigate this Guide

This guide first provides overarching **principles** that drive its recommendations and considerations. We recommend starting with the underpinning principles and incorporating recommendations, strategies, and tools across the different phases of knowledge gathering: **planning, knowledge gathering**, and **knowledge sharing** to the extent that is practical and will best help you to achieve your goals. Making this a continual, collaborative practice can motivate your team to take necessary steps to increase equity and inclusion in its knowledge-gathering activities.

This document is meant to offer broad guidance, rather than step-by-step instructions. Please use the Notes and Reflection space as a worksheet for your project.

III. Principles

These principles support equitable and inclusive knowledge gathering which in turn, yield a more rigorous product. By rigor, we mean the clarity of process, research questions, and methodology; a process that is participatory at all stages; and a product that is widely accessible across society.

Collaboration:

Knowledge gathering is not just for "experts" to lead and others to follow. When we do not bring everyone to the table and make efforts to equitably share power in decision making, we risk excluding the knowledge that is closest to the problem. Collaboration builds trust and increases mutual learning and thus is part of the development process—in knowledge gathering and beyond.

Humility:

Knowledge is most productively gathered when our minds are open, when learning is prioritized, and when we trust the people with whom we are working. Humility pushes us to reflect on our own biases so that we can bring conflicting perspectives into conversation. In the end, we believe that those who are closest to the problem are closest to the solution.

Transparency:

Knowledge production works best when communications are as clear, consistent, universally understood, and as mutually valuable as possible. This includes clear descriptions of the methods selected, why they were selected, assumptions and limitations, our intended audience, and our goals for the knowledge gathering. Knowledge gatherers should be honest about the fact that we are not neutral and our emotions play a role in our work. Transparency builds trust and deeper learning.

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IV. Recommendations and Strategies for Phases of Knowledge Gathering and Sharing

Planning Phase

In this phase you'll be developing your knowledge-gathering goal, and partnership and stakeholder strategies, as well as deciding on your data-collection methods and tools. As you carry out this planning phase, the guidance below is meant to help you bring the inclusive principles to life in your knowledge-gathering project. Select the recommendations and strategies that are appropriate for your project.

It is essential to invest time in building relationships with local partners where knowledge can be shared mutually and in a transparent fashion. When we invest time in building trusting relationships, knowledge production processes become more relevant to local contexts and ultimately, we can improve knowledge uptake.

Resources during this phase

- Guide for overcoming digital barriers to inclusion in online learning
- Consolidated Framework for Implementation Research Guide
- Youth Excel Research-to-Change Toolkit (See Module 2: Who should we engage in our Research-to-Change journey? and the Quick Start Guide for Research-to-Change), which includes tools for stakeholder engagement planning, research ethics, and a research planning tool
- Gender and Protection Analysis Toolkit
- Inclusive Budgeting or Participatory Budgeting tool

GUIDANCE	NOTES / REFLECTIONS

Recommendation A:

Conduct your **literature review** to identify and consider a diversity of perspectives. There is a role for well-established literature, but it is not the only standard and may provide less relevant information because it may be colored by historical power imbalances and racism.

Strategies:

- Use terms in English and local languages (if different) to find relevant literature.
- Ensure that you have a combination of established literature (e.g., peer-reviewed) and white papers.
- Consider focusing on more recent knowledge products because they may better reflect current conditions or knowledge.

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Recommendation B:

Conduct an **assessment of intersectional power dynamics** to understand how knowledge systems operate within the local context.

Strategies:

- Engage local stakeholders to learn what social factors impact power dynamics within context.
- Consult a Gender and Protection Analysis Toolkit.

Recommendation C:

With stakeholders, develop a shared understanding of the **problem and the learning goals.**

Strategies:

- Work with a team of stakeholders to define the problem that the knowledge-gathering process will address.
- Through transparent conversations, share priorities with stakeholders and allow them to share their priorities with you. Work to align and complement your priorities toward a shared understanding of what you hope to learn.

Recommendation D:

Conduct a **stakeholder mapping and engagement planning** activity to help you understand the various actors engaged with or affected by your knowledge gathering project. Co-create a stakeholder engagement plan that accounts for power dynamics and that meaningfully and strategically engages different actors throughout your knowledge gathering.

Stakeholder engagement plans should include components such as motivations and hesitations to address a shared problem, relationships, and power dynamics among stakeholders, and specific timepoints for engaging each stakeholder. It is important to ask stakeholders what inclusion means to them and use these insights to build your plan.

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Strategies:

- Creating a community or international advisory board is one way to conduct stakeholder-driven mapping.
- Consult the Youth Excel Research-to-Change Toolkit (See Module 2: Who should we engage in our Research-to-Change journey?), which has guidance on stakeholder engagement planning and a practical stakeholder power analysis and planning tool.

Recommendation E:

Organize a meeting with a team with diverse perspectives to **name the different assumptions** that your knowledge-production project is relying on.

Strategies:

- Consult the Consolidated Framework for Implementation Research (CFIR) Guide to organize assumptions into domains.
- If you decide to convene a community advisory board, naming assumptions would be a good activity for that group.

Recommendation F:

Co-create an **knowledge-gathering plan** with a diverse range of stakeholders and community members. Information gathering should be centered around specific decisions that local partners would like to make or assumptions they would like to test.

Knowledge-gathering plans should include components such as mutual learning goals, data-collection tools, and sampling plans.

Strategies:

- Consult the Youth Excel Research-to-Change Toolkit (See Quick Start Guide for Research-to-Change), which contains a Planning for Ethical and Effective Research (PEER) Workbook, a practical knowledge-gathering planning tool.
- Consider participatory research activities that center participant voice, such as photovoice.

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Recommendation G:

Proactively **work to broaden participation** in the knowledge gathering.

Strategies:

- Work with key stakeholders to identify factors that serve as facilitators and barriers to participation.
- Monitor these factors throughout implementation. (e.g., what is needed in order for rural women in Kenya to be able to participate?).

Recommendation H:

Choose your **data-collection methods** and plan your **data-collection activities** in ways that ensure the rights and protection of participants; and ensure that you will get useable data. Always consider how power dynamics may shape your data collection.

Strategies:

- Prioritize participatory data collection, include informed consent, organize data collection so that everyone feels free and comfortable to speak, adapt your data-collection tools based on what you learned from the pilot tests (in planning), and be intentional about who from your research team will collect the data.
- Build in reflection points to reconsider how power dynamics may influence data collection.

Recommendation I:

Ensure that **data-collection tools** are comprehensive, and language, concepts, and approaches are understandable.

Strategies:

- Pilot-test all data-collection tools within local communities.
- Use insights from communities to strengthen tools before implementation.

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Recommendation J:

Consider how knowledge-gathering methods might influence **knowledge quality**.

Strategy:

- In choosing data collectors, be aware of their situational relationship with participants—empowering data collectors who look like and share common experiences with participants may gather more accurate information.

Recommendation K:

Establish an **ethical accountability system** for knowledge production. There are key ethical requirements for which all knowledge production efforts should be held to account: maximizing benefits and minimizing harms, ensuring privacy and confidentiality, considering compensation, and establishing informed consent.

Strategies:

- Consult the Youth Excel Research-to-Change Toolkit (See Quick Start Guide for Research-to-Change), which includes an ethics accountability self-assessment guide, to learn more about ethics accountability systems and how to identify the right system for your project.
- Consult the Youth Excel Research-to-Change Toolkit (See Quick Start Guide for Research-to-Change), which has a Planning for Ethical and Effective Research (PEER) Workbook for templates and prompts to consider privacy, compensation, and informed consent.

Recommendation L:

Budget time and resources for co-creation, inclusion, and feedback solicitation. Budgets are value statements, and if participatory processes are to be valued within a project, budgets should reflect this.

Strategy:

- Consult an Inclusive Budgeting or Participatory Budgeting tool.

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Knowledge-Gathering Phase

In this phase you'll be collecting and analyzing data and providing insights on data for decision making. As you carry out this implementation phase, the following guidance is meant to help you bring the inclusive principles to life in your knowledge gathering project. Pick and choose what is right for your project.

It's important to learn and facilitate learning throughout implementation. The continued leadership and involvement of front-line practitioners should be championed throughout implementation, blurring lines between researcher and research participant. Encouraging ongoing opportunities for vulnerability and reflection, such as Reflective Practice, and bringing empathy to your work will strengthen trust and increase learning. Empathy is a skill that you can build for yourself and your team; see IREX's Power Learning Tool. Throughout implementation, ask yourself and your team to what extent you are being power sharers and power holders.

Resources during this phase

- Power Learning Tool
- Youth Excel Research-to-Change Toolkit
- Do No (More) Harm Approach
- What is Reflective Practice?
- Protection and Safeguarding
- Prevention of Sexual Exploitation and Abuse (PSEA)
- Ethical Research with Children (also relevant for others)
- Collaborating, Learning, and Adapting: USAID resources

GUIDANCE	NOTES / REFLECTIONS

Recommendation A:

Create **protection and safeguarding guidance** to ensure the privacy and security of all participants and the data collected.

Strategies:

- Reflect on how to employ the concept of Do No (More) Harm.
- Put measures in place for Protection and Safeguarding.
- Design the initiative to ensure the Prevention of Sexual Exploitation and Abuse (PSEA).

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Recommendation B:

Evaluate and utilize data throughout the knowledge-gathering process. Facilitate regular working sessions to review, analyze, and interpret the most recent data; make collective decisions around program adaptations; and facilitate continued learning with key stakeholders and participants in your information gathering.

This reflection will also help verify that local knowledge is centered in decision making and that we work toward a model of information gathering that is more inclusive.

These practices will help to advance not only inclusion but also continuous collaborating, learning, and adaptation (CLA) priorities.

Strategies:

- Consult the Youth Excel Research-to-Change Toolkit (See Module 6: How can we share findings and gather feedback), which contains a practical approach to sharing data with stakeholders and receiving feedback.
- Incorporate other reflection opportunities.
- Consult USAID CLA resources.

Recommendation C:

Gather knowledge and insight from all stakeholders in the process. Facilitate regular sessions where team members reflect on significant moments they have experienced during the implementation process. Sharing these personal reflections can help to establish learning and build trust within teams.

Strategy:

- See What is reflective practice? for guidance.

Recommendation D:

Schedule time to share findings with those you engaged as participants of your knowledge gathering and those who did not participate in the program, but who share similar experiences.

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When we dedicate time to communicate our understanding of the knowledge-gathering exercise and ensure opportunities for others to contribute to interpreting the data, we work toward a model of information gathering that is less extractive and more accurate and insightful.

Strategy:

- Convene groups of participants at regular intervals throughout the knowledge-gathering process. This can be done online, if necessary.

Knowledge Sharing Phase

In this phase you'll be creating knowledge products that incorporate your knowledge gathering results and planning for continued learning. As you carry out this post-implementation phase, the following guidance is meant to help you bring the inclusive principles to life in your knowledge gathering project. Pick and choose what is right for your project.

It's important to maintain the goal of open access and open data for knowledge products. Think broadly: from the perspective of languages, education, and cost. When compromises in openness are made, be transparent about them.

Resources during this phase

- Creative Commons Guidelines
- Open Data Principles
- Web Content Accessibility Guidelines

GUIDANCE | NOTES / REFLECTIONS

Recommendation A:

Create knowledge products in **format(s) appropriate to the communities** they are serving and individual accessibility such as visual or auditory limitations.

Strategies:

- Analyze what is needed, drawing on community expertise.
- Check the Web Content Accessibility Guidelines.
- Consult the Knowledge Products box on page 1 of this guide.
- Follow Creative Commons Guidelines.
- Adhere to Open Data Principles.

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Recommendation B:

In your copyediting, check that your products employ **friendly, rather than technical language** to share findings.

Strategy:

- Tap someone with "fresh eyes" to do a final copyedit; for example, someone from a different sector or from the group of local participants.

Recommendation C:

Be transparent about how the knowledge gathering choices made due to access, budget, time, and so forth had an impact on which perspectives were and were not included.

Strategy:

- In addition to a discussion of methodology and data limitations, include a section on inclusion limitations that defines those limitations and acknowledge those who were not included.

Recommendation D:

Create a **dissemination plan** that ensures reaching the audience most impacted by the findings through the channels most accessible to them.

Strategy:

- In terms of accessibility, your community partners will often have the most insight into the language, internet access, preferred platforms, and so on, of the community of participants. Request that they lead the dissemination planning.

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Recommendation E:

Monitor the uptake and the impact of your information-gathering process and products.

Strategy:

- Create opportunities for sharing, feedback, and learning, such as community listening events and sharing "sandbox" documents where all can play.

V. Additional Resources

- [Decolonising International Development](#)
- [The Dignity Project](#)
- [The Equitable Evaluation Framework](#)
- [Participatory Evaluation](#)
- [Principles for digital development](#)
- [The Three Rs: How Community-Based Participatory Research Strengthens the Rigor, Relevance, and Reach of Science](#)
- [White supremacy culture](#)
- [Why Am I Always Being Researched?](#)

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