

Checklist

FOR ASSESSING EQUITY
IN KNOWLEDGE MANAGEMENT
INITIATIVES

HOW-TO GUIDE

*A companion tool to the
Building Better Programs guide*



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This guide is part of The Knowledge Management Collection, a family of resources designed for the global health workforce to help them understand, use, and train others on knowledge management approaches, tools, and techniques.



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The Knowledge Management Pocket Guide for Global Health Programs

The Pocket Guide provides a basic overview of the Knowledge Management Road Map and serves as a quick reference on key steps for applying the Road Map to global health programs.



Building Better Programs: A Step-by-Step Guide to Using Knowledge Management in Global Health

Using the Knowledge Management Road Map as a foundational framework, this detailed guide demonstrates how to develop and implement a systematic and equitable knowledge management strategy to improve the efficiency and effectiveness of global health programs.



Equity in Knowledge Management Checklist

Designed to be used with the *Building Better Programs* guide, the Equity in Knowledge Management Checklist is a practical tool for the global health workforce to integrate equity as they design, implement, monitor, and evaluate knowledge management interventions.



Knowledge Management Training Package for Global Health Programs

Comprising trainer's guides, presentation slides, exercises, tools, and templates, the Knowledge Management Training Package is a comprehensive set of training materials to develop the skills and capacity of global health program staff in the systematic knowledge management process and in specific knowledge management approaches, such as share fairs and content management.

All resources are available for download at www.kmtraining.org



CHECKLIST FOR ASSESSING EQUITY IN KNOWLEDGE MANAGEMENT INITIATIVES

A companion tool to the [Building Better Programs](#) guide

HOW-TO GUIDE

This how-to guide provides additional context to help you answer the questions in the [Checklist for Assessing Equity in Knowledge Management Initiatives](#) and links to useful resources that can help you better understand how to move toward equity in knowledge management (KM).

Equity in KM for health programs is the absence of unfair, avoidable, and remediable differences in knowledge access, creation, sharing, and use among groups of health workforce members, whether those groups are defined socially, economically, or environmentally. Equity is achieved when all people in the health workforce have the information, opportunity, skills, and resources they need to define and participate in the process of knowledge access, creation, sharing, and use to improve health programs.

KM Systems

TEAM ROLES AND OPERATIONS

- 1. Diversity of team:** Meaningful diversity and inclusion contributes to program success through added richness of knowledge and perspectives. (For a brief overview on diversity, inclusion, and equity in the workplace, see a [short video](#) that references the UK Equality Act.) Even small KM teams can take steps to make progress on inclusion, diversity, and equity. For example, you can commit to elevating the power of historically marginalized groups in the KM initiative by recognizing and including them in the needs assessment and KM strategy design (Steps 1 and 2 of the KM process), keeping in mind that one or a few individuals cannot represent the diversity found within an entire group. Longer-term [actions](#) in recruiting, hiring, and succession planning should also be considered, especially in large teams, as well as in ensuring [competency](#) in and accountability for equity.
- 2. Feedback opportunities:** Creating space, whether openly or anonymously, for all team members to collectively identify and provide feedback on the KM goals, strategies, and activities is a practice of inclusion that can help make the KM initiative more successful. Team members should feel safe to provide comments without fear of repercussions.
- 3. Distribution of roles and responsibilities:** Inequitable roles and responsibilities may reflect and reinforce inequitable social norms, such as “volunteering” or assigning administrative roles to one group, such as young women, but not another. Equitable roles and responsibilities across the team flatten hierarchies, build trust, distribute power, and value the experiences and perspectives of each individual.

4. **Communication methods:** Understand what communication methods team members already use and can use going forward to ensure all team members can access and share knowledge. It may be helpful to delineate the methods to use for specific types of information (e.g., Slack or WhatsApp for the day-to-day or when you need a quick response, email for less urgent items, and meetings for complex issues). Reduce, as fully as possible, any language constraints.
5. **Experience and expertise of team:** One mechanism could be regular check-ins with team members on their ideas, skills, and goals. A tool could include a matrix or a database of skills, experience, or interests of each team member. This may include life experience, non-academic experience and expertise, and recognition of complementary skills that might fall outside of an individual's current/formal job description.
6. **Staff performance reviews:** Equity-related competencies for performance reviews could include items from this checklist, such as the inclusion of people with disabilities in KM events. Accountability encourages team members to hold each other to a standard for integrating equity throughout the project. Staff reviews and [bi-directional performance feedback](#) are examples of accountability processes and mechanisms.

TEAM, PROJECT, OR ORGANIZATIONAL CULTURE, NORMS, AND POLICIES

7. **Safeguarding measures:** Harassment, discrimination, and gender-based violence can affect everyone in varying ways. However, standard policies and procedures may not be responsive to the needs of historically marginalized populations who may disproportionately bear the weight of harassment and discrimination. Safeguarding policies and measures create options for people to report negative experiences and protect themselves or others. The policies and procedures must be clearly communicated to staff. Follow-up systems must remain active for safeguarding policies to be effective and for team members to feel secure and heard. For examples of safeguarding policies, see [FHI 360's policy](#) on protecting program participants and [CARE International's safeguarding policy](#). See also the [UK Research and Innovation's resource](#) for reflective questions on equity and fairness in safeguarding within research.
8. **Participation in KM activities:** Consider gender identity, sex, age, geographical location, seniority, race, ethnicity, position, ability, and other individual or group characteristics that affect attendance and participation at various KM activities, like conferences and workshops. Considering these characteristics can help expand the pool of people who attend these types of events.
9. **Equity guidance:** Equity guidance could include items from this checklist and other standards developed by the KM team. Guidance could be written into existing tools and resources or added as amendments. This is one way to enhance the capacity of staff in equity integration, as well as to ensure equitable design and implementation of KM tools and techniques throughout your KM initiative.
10. **Authorship policies:** Authorship norms and resources for working on peer-reviewed journal articles may exclude the contributions made by certain groups. For example, researchers in low- and middle-income countries, especially those who are women, are frequently the people collecting data, yet they may not be listed as authors and sometimes [cannot access the data they gathered](#). Consider ways to encourage [equity in authorship guidelines](#), such as listing all contributors who had a role in producing the research and article.

11. Dialogue: Consider how the team can create intentional and safe, respectful spaces where all individuals can share and discuss information freely. For example, gender homophily—the preference to interact with people of the same sex or gender identity—can act as a barrier to knowledge access if women are excluded from male-dominated partnerships and informal networks. Norms where knowledge and information are shared by all, as compared to norms where knowledge is held by one member or a few members of the team, reinforce equitable gender dynamics and power structures. You can work toward these equitable norms by having open conversations about identity and its relation to who holds power and what types of power on teams.

12. Team expectations and norms: When discussing expectations and norms, it is important to acknowledge and fairly share power between and among team members to ensure operations meet the needs of all team members. Suggested practices for inclusive meetings include:

- Making everyone feel welcome and encouraging diverse points of view and even disagreement
- Sending out agendas in advance
- Rotating roles every meeting
- Encouraging less-dominant participants to state their views by vocalizing or writing their thoughts
- Being transparent with the team about how decisions will be made
- Diversifying and sharing decision-making power fairly

Find more tips on how to run inclusive meetings [here](#).

RESOURCES

13. Time: If possible, make reflection on equity a consistent part of your work whether done individually or collectively through meetings, such as quarterly “pause and reflect” days or After Action Reviews (see the [Building Better Programs](#) guide for more details). Reflection and learning can also be tied to team accountability to strengthen equity in your work. Team accountability measures could include documentation of successes and challenges with equity integration, reporting, meetings with real-time feedback, or collected written feedback (open or anonymous). Accountability should be held toward both internal team KM processes and external KM activities developed by the team.

14. Budget: Translation/interpretation services, printing costs, and internet data credits are a few examples of equitable elements that you may need to include within your budget depending on the KM activities you conduct. Once you complete this checklist, review your areas of strength and actions you need to take to be more equitable to ensure you budget appropriately for these needs.

Step 1: Assess Needs

- 1. Defining audiences:** Understanding how intersecting identities shape people's lived experiences means not only looking at, surveying, or inquiring into one category of identity (such as gender) but reflecting on how different elements of an individual's or group's identities exist together to shape health knowledge needs. For example, knowledge needs and preferences may vary between women (gender identity), low-income (class) health workers (occupation) as compared to women, high-income health workers because of the relative levels of power held by each group, which may determine their access to and use of knowledge.
- 2. Needs assessment questions:** See page 5 of the [Building Better Programs](#) guide for specific questions to consider including. Assess the KM roles and responsibilities of each group of people.
- 3. Existing data:** Sources of existing data could include evaluation reports, management reports, training assessments, or community of practice meeting summaries or recordings. Using multiple varied sources may provide a more inclusive review of knowledge needs and barriers for various subgroups. Keep in mind that some data may be missing or will have limits in disaggregation. If certain subgroups are missing, consider taking time to collect new data to capture the knowledge needs and preferences of those missing subgroups.
- 4. Collecting new data:** Responsive ways of participation could include using language interpretation or translation and combining different methodologies, such as surveys and interviews.
- 5. Disaggregation of data:** The dimensions of your data disaggregation (e.g., gender identity, geographic location) will depend on the objectives of your KM initiative. Keep in mind any sensitivities of disaggregation. For example, if a community has tensions between ethnic groups, consider if more harm is caused by disaggregating the groups compared to aggregating groups.
- 6. Synthesis of findings:** Formats could include printed text, audio, video, or online. If resources are limited, define what the most accessible format(s) is for the most historically marginalized groups. Write and translate the synthesis of findings into appropriate languages and avoid jargon.

Step 2: Design Strategy

- 1. KM objectives:** Remember to align your KM objectives and strategy to the needs assessment findings and consider your objectives with equity in mind. For example, did you uncover different challenges or opportunities in knowledge access, creation, sharing, and use by subgroups of your audience? If so, you may need to create different KM objectives for particular subgroups.
- 2. Audience:** Because KM work is iterative and ongoing, the audience of your needs assessment may be different from the audience of your KM intervention, so you may have to define a different audience for your KM intervention. Consider the relative power and privilege these groups hold in the context you are working in and how power can be shared more equitably with historically marginalized groups.
- 3. KM tools and techniques:** KM is often associated with technology solutions, such as building websites or databases, but it also includes a range of tools and techniques that connect people together and to the information they need through, for example, peer assists, knowledge cafes, and share fairs. These interactive approaches that involve more human interaction may be more appropriate for your KM initiative to center the knowledge needs and preferences for historically marginalized groups. Find out more about the range of [KM approaches](#) on the KM Training Package for Global Health Programs website.
- 4. Information, Communication, and Technologies (ICT) access:** Include low- or no-tech options, such as in-person KM events, hybrid events, low-bandwidth websites or apps, SMS platforms, or printed materials, for people who may not have internet access needed for some ICTs. Remember that some low-tech or no-tech options may have other costs to consider, such as transportation and lodging for in-person events.

Step 3. Create and Iterate

ASKING AND TELLING APPROACHES

AVAILABILITY

- 1. Interactive KM approaches:** Effective KM initiatives often use multiple KM tools and techniques to share the ideas of all priority audiences across diverse and intersecting identities. Interactive KM techniques, such as share fairs, are helpful for establishing and nurturing connections between people and engaging them in conversations to facilitate knowledge exchange. Allocate more time for conversations to occur in multiple languages, including time for translation and interpretation.
- 2. Diversity of KM event leaders:** Avoid tokenism (i.e., including a small number of historically marginalized people, such as women or Indigenous people, to look “inclusive” without any structural changes for equality) when designing events. Budgeting for compensation for KM event speakers and panelists may reduce any financial barriers to the participation they face and may encourage participation of people from diverse backgrounds.

ACCESSIBILITY

- 3. Accommodation needs:** Include options at registration for confidentially sharing accommodation needs, such as interpretation services, lactation room, childcare services, availability of quiet/prayer spaces, live captioning or subtitling, elevator access, and wheelchair ramps, and contact information to inquire further about those needs.
- 4. Options to ask questions:** Illustrative virtual options for engagement include audio, chat function, social media, and virtual interactive meeting [tools](#). Some of the virtual options can be used in person with personal electronic devices. Other in-person options include writing down a question on paper with or without names for anonymity.
- 5. Accessible locations:** Accessible locations may include wheelchair accessible and low-vision accessible spaces. Availability of transport options and public safety for women, girls, and people of other gender identities may also be a determinant of where events are held. Accessibility may also mean providing compensation or care arrangements for people with disabilities to bring an assistant to the event.
- 6. Time zones:** For global events, it can be challenging to find a convenient time when people around the world can participate equally. Recording the event and making the recording and a written summary available after the event for those who could not attend the live session or hosting country and regional sessions in addition to global sessions can help ensure equity in access and participation.
- 7. Languages:** Sharing knowledge in the language an audience is most comfortable using may enhance and ease the discussion. Ask in advance what languages people feel most comfortable using and use interpretation services as needed. Keep in mind that more time may be needed to interpret between languages.

8. **Subtitling/captioning:** [Captions](#) are a text version of the speech and non-speech audio information needed to understand the content and are usually shown within a media player (e.g., within the teleconferencing platform like Zoom or in the video recording). Captions are used by people who are Deaf, hard of hearing, have difficulty processing auditory information, and others. Subtitles generally refer to the spoken audio translated into another language. If the event is in-person, reserve appropriate seating and allocate space for people who use sign language and interpreters.
9. **Transcripts:** [Transcripts](#) are a text version of the speech and non-speech audio information needed to understand the content and are usually provided in HTML format on a web page (unlike captions that are generally written to be viewed along with the visual video). Transcripts should therefore include important visual information for those not seeing the video (e.g., a description of key visuals occurring in the video). Transcripts are used by people who are Deaf, hard of hearing, have difficulty processing auditory information, and others.

ACCEPTABILITY

10. **Freedom from harassment:** An environment of enhanced safety means a space, whether online or in-person, that encourages active participation by everyone without fear of harm, harassment, discrimination, abuse, or violence. (Learn more about the rise in [online gender-based violence](#).) You can achieve an environment of enhanced safety and freedom from harassment by creating a code of conduct—a document stating expectations for all participants at an event to enhance safety and freedom from harassment or discrimination—and training event staff on how to deal with any issues that may arise. Codes of conduct typically require selection of a Safety Officer that participants can approach if they feel unsafe or witness a breach of the code. All participants should uphold and honor the code of conduct.
11. **Holiday schedules:** You can find lists of national/religious holidays by country online (e.g., [timeanddate.com](#)). Event planners should also consider preferences around or during certain times of the year (e.g., during periods of religious fasting).
12. **Photo and video consent:** If you are planning to take photographs or record video during your KM event or activity, consider guidelines for the [ethical use of photography in global health](#).
13. **Dietary requirements:** For example, you may need to consider providing vegetarian, vegan, dairy-free, gluten-free, Halal, Kosher, or other options.
14. **Gender identities:** Using the [correct pronouns](#) recognizes the person as they are and want to be known. Normalize the practice of indicating everyone's pronouns (such as on name tags or Zoom profile names) for those who want their pronouns publicly known.
15. **Pronunciation of names:** When inviting panelists, ask them to share the correct pronunciation of their names during dry runs of the event or through voice recordings. There are also online pronunciation tools, such as [Voice of America's Pro-nounce tool](#).

QUALITY

- 16. Briefing notes:** Briefing notes could include prompts for hosts/facilitators to call on the participants or panelists with the least power and privilege first in their responses or presentations. [Research](#) on gender dynamics show that when women are called on first, other women in the space are more encouraged to participate.
- 17. Representation:** Since topics could have multiple angles, consider the audience that may be present at the event and how the topic could relate to them. Consider having multiple speakers that may better represent different perspectives of the topic, including people with direct or lived experience with the topic being addressed, to ensure the knowledge being shared is more relatable. Keep in mind that one or a few individuals cannot represent the diversity found within an entire population.

PUBLISHING AND SEARCHING APPROACHES

AVAILABILITY

- 1. Diversity in publishing:** Note that women are less likely than men to be cited or published in peer-reviewed literature and to present at conferences. Consider whether your KM initiative can promote diversity in publishing by strengthening the capacity of women and historically marginalized voices through writing workshops and mentorship opportunities. See, for example, [AuthorAid](#), the Global Health eLearning Center course on [Journal Manuscript Development for Global Health](#), and the [EASE Guidelines for Authors and Translators of Scientific Articles](#). In addition, a call for publications from historically marginalized members of the health workforce could be one way to encourage more publications from populations with traditionally less power and privilege who have historically been excluded from major publishing platforms to recognize their expertise.
- 2. Range of formats:** Formats include videos, infographics, and audio podcasts, in addition to written reports and articles.

ACCESSIBILITY

- 3. Actionable information:** Global health workforce members in countries of implementation have indicated the information they need to improve their programs is not always readily available, including best practices with details on the “how” and the context, as well as on failures in health programs. [Guidelines and templates](#) for documenting transparent, detailed, and actionable information, in contrast to traditional publication styles, can help capture and share the type of knowledge that the health workforce wants and needs.

4. **Cost:** For journal articles, traditional journals typically charge authors a fee to make their articles open access. Most open access journals also charge authors a publishing fee. For journal articles published as part of the KM initiative, consider paying these article processing charges to make the articles open access. Alternatively, most journals allow authors to post a free copy of the article, usually in pre-print format, to their institution's repository (called self-archiving), with some journals imposing an "embargo" period of 6–12 months or longer after the date of publication on self-archiving. Finally, you can consider publishing in non-commercial "diamond" open access journals, such as [Global Health: Science and Practice](#), that are free to both authors and readers.
5. **Diversity in readership:** Collect data on who is and is not accessing and using the content resources and decide if you need to make any adjustments to your content dissemination and use strategy.
6. **Print options:** In low- or limited-technology contexts, if printing is not within the budget, consider printing only an executive summary or a certain language translation of the material. Another option is to collaborate with intermediary audiences who do have internet access to convey key points in meetings with audiences who do not have access.
7. **Translation:** Content in an audience's primary language may reduce the burden of the audience to translate resources in secondary or unknown languages on their own. Creating original content in the language of preference for audience members signifies attention and responsiveness to the needs of the audiences, which may also build a sense of ownership of the content.
8. **Web accessibility:** See the Web Accessibility Initiative for [tips](#) on getting started. An example of writing for web accessibility is to use headings to convey meaning and structure, and an example of designing for web accessibility is to not use [color](#) alone to convey information.

ACCEPTABILITY

9. **Feedback:** You can use free online readability calculators (e.g., [Online Utility](#)) to measure the number of years of education needed to understand a given text. Feedback can be collected through several different mechanisms, such as surveys, interviews, live chats, or even one-on-one conversations.
10. **Jargon:** Technical jargon can create barriers to understanding the content, especially if the content is not in the primary language of some audience members. Consider replacing technical jargon with more commonly used phrases and words.
11. **Representation of people and places:** A common mistake in communication materials, including visual content, is to portray people in victimizing ways. Good practice would be to portray people in dignified ways as part of their daily routine. Refer to the UNDP's [10 principles](#) of gender-responsive communications for development for further information.
12. **Representation of people in diverse roles:** Strive for fair visibility of audience members by presenting them in diverse roles (e.g., not just of men in leadership roles and women in support roles). Refer to the UNDP's [10 principles](#) of gender-responsive communications for development for further information.
13. **Images and consent:** When using photographs in your publications, be sure to consider guidelines for the [ethical use of photography in global health](#).

QUALITY

- 14. Diverse editorial boards:** Diverse and inclusive editorial teams and editorial boards may be more likely to curate content that reflect the diversity of the audience.
- 15. Diverse reviewers:** Peer reviewers with diverse identities may bring perspectives to the review process that challenge dominant knowledge paradigms and may have relevant experience necessary for review. Enabling and supporting less experienced colleagues to engage with peer review can also support efforts to create more inclusive KM strategies.
- 16. Knowledge production by historically marginalized groups:** Youth, female community health workers, and LGBTQ health workforce members are illustrative examples of health workforce groups that are historically marginalized in content piece production.
- 17. Language and power dynamics:** This [blog post by PATH](#) provides examples of terms used in the global health field that some consider to be problematic.

Step 4. Mobilize and Monitor

- 1. Disaggregation of data:** The dimensions of your data disaggregation (e.g., gender identity, geographic location) will depend on the objectives of your KM initiative. Keep in mind any sensitivities of disaggregation. For example, if a community has tensions between ethnic groups, consider if more harm is caused by disaggregating the groups compared to aggregating groups.
- 2. Options to self-identify:** Identity categories that are not part of mainstream data reporting structures may exclude certain audience members, so having an open-ended option for people to write in how they self-identify is important as is including an option for people to indicate that they prefer not to answer the question.
- 3. Documenting equity integration:** Documentation, to monitor progress, is one way to ensure accountability for integrating equity into KM. It can also enhance capacity of project staff in equity integration and help others make sound, informed decisions in the future. Documentation systems could include open, peer, or anonymous feedback forms (from both audience and KM team members) and discussions on how well the KM initiative is meeting equity considerations.
- 4. Reflection and adaptation:** Documentation of progress toward equity integration into KM should be paired with reflection on what has been documented along with identification of any adaptive actions.
- 5. Equity in progress reports:** Including an equity section capturing the subgroups in your audience within your progress reports is important to hold the team accountable throughout the KM initiative and assess successes and challenges over time.

Step 5. Evaluate and Evolve

- 1. Evaluation questions:** Consider if the evaluation questions include the interests of the audience members and not only the interests of the donor, government, international NGO, or other organization that may hold more power. Who the evaluation questions are relevant to may determine if the findings and actions following evaluation sustain or challenge inequitable gender and power dynamics.
- 2. Methodologies:** [Complexity-aware monitoring and evaluation methods](#) are methods that assess change as an incremental process instead of an endpoint and final product, are participatory in nature, and situated in local contexts. [Most Significant Change](#) or [Outcome Mapping](#) are examples of complexity-aware methods. Using these methods can capture equity-related incremental and transformational changes in your KM initiative.
- 3. Successful and unsuccessful approaches:** Documenting unsuccessful approaches is equally as important as documenting successful approaches to avoid repeating past mistakes or ineffective strategies. Examine if the unintended consequences are improving or harming equity in your KM initiative.
- 4. Sharing lessons:** It is important to reach all subgroups of the audience who may typically be excluded from dissemination approaches, including the groups from whom the data were collected.
- 5. Dissemination participants:** Avoid tokenism (which means including a small number of historically marginalized people to look “inclusive” without any structural changes for equality). Compensate the people who give time to share their experiences. Keep in mind that one or a few individuals cannot represent the diversity found within an entire population. Identifying “champions” is a way of enhancing and grounding communications efforts by sharing concrete examples of their distinct experience.
- 6. Broader dissemination efforts:** Because equity integration in KM is a relatively new field, it is especially important to share findings and lessons with as broad of an audience as possible to support further integration efforts.

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In addition to the *Building Better Programs* guide, the checklist draws on guidance from the [Gender Strategy for the Knowledge SUCCESS Project](#), [Gender](#), think-tanks and international affairs, USAID's [Suggested Approaches for Integrating Inclusive Development Across the Program Cycle and in Mission Operations](#), and the Health Communication Capacity Collaborative's "[Integrating Gender into Social and Behavior Change Communication](#)" checklist.

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