

Embedding Equity Considerations in Technical Assistance



KANSAS HEALTH INSTITUTE

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Development of the Guides

Many organizations may encounter challenges in embedding equity in their research, literature review, technical assistance, facilitation and policy analysis due to uncertainty about effective approaches and strategies. Although numerous valuable resources exist to guide these efforts, they are not necessarily structured by topic, phase of the project or as checklists.

To address this, the Kansas Health Institute (KHI) has developed a set of practical guides to integrate equity considerations at every stage of these processes. Development of the guides was informed by current literature and KHI's experiences.

Feedback on the set of guides was gathered during a convening hosted by KHI on May 14, 2024, titled "*Centering Equity in Research: Developing Practical Strategies and Identifying Considerations*," as well as through a post-event survey. The convening included about 50 stakeholders from across Kansas who reviewed these strategies and provided valuable feedback, which later was incorporated into the guides. The event featured speakers Eusebio Díaz, M.A., Vice President of Strategy, Learning and Communications at the Health Forward Foundation, Shannon Portillo, Ph.D., from Arizona State University and Bridgette L. Jones, M.D., M.S.C.R., from the University of Missouri-Kansas City. The speakers discussed the current state of equity in research, addressing challenges and exploring future opportunities.

These guides are organized by process stage and in checklist format. They are designed to be a practical tool for easy application. The strategies suggested are not intended to be a complete list of all possible strategies that could be used. Additionally, it may not be appropriate or feasible to implement all of the strategies listed in a single project. The purpose of this set of checklists is for researchers to consider opportunities to center equity more intentionally and build capacity over time to experiment with and build upon these strategies. Also, while the checklists are presented linearly, we suggest using an iterative and flexible approach in your research as necessary.

The guides are intended for a wide range of audiences, including those engaging in research activities and members of the community who are engaged in or affected by research.

Health equity – The state in which everyone has a fair and just opportunity to attain their highest level of health. Achieving this requires focused and ongoing societal efforts to address historical and contemporary injustices, overcome economic, social, and other obstacles to health and health care, and eliminate preventable health disparities.

We Value Your Feedback!

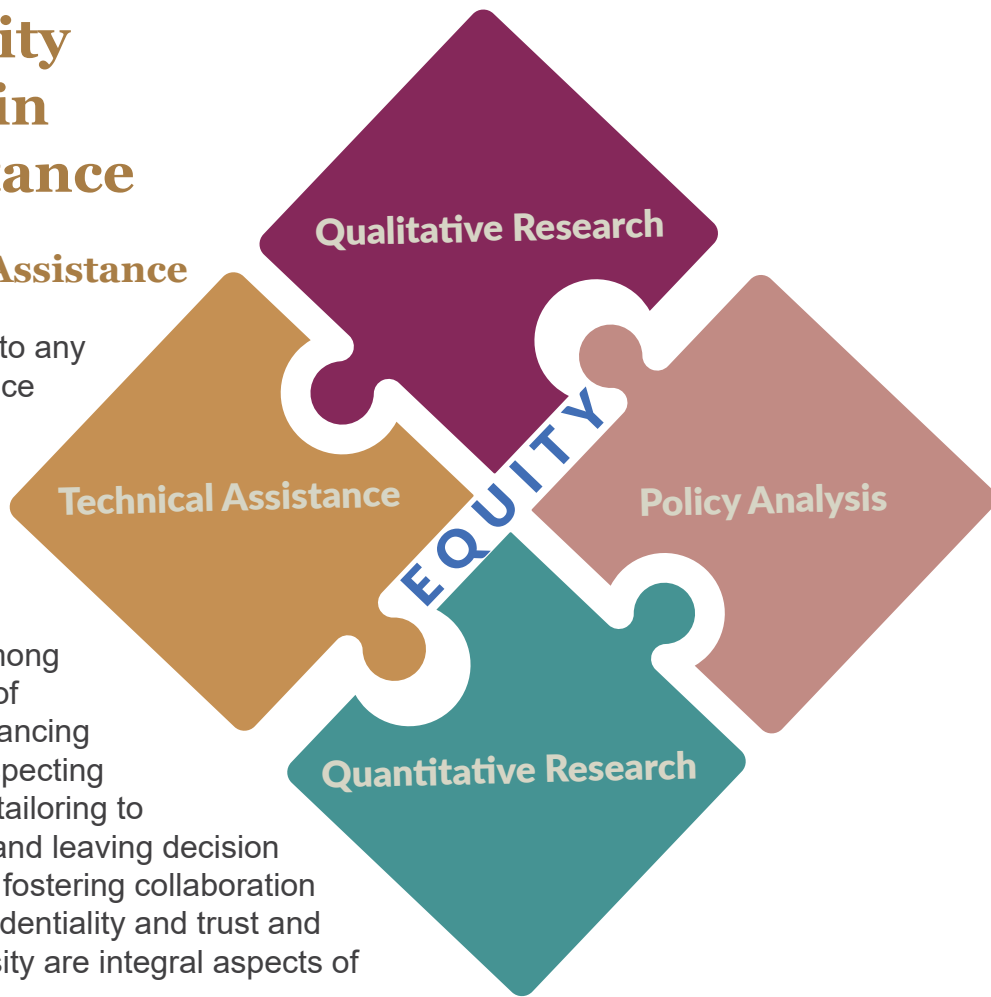
To ensure we hear from as many voices as possible, we are launching an open comment period from July 1, 2024, to Dec. 31, 2024. This period is an opportunity for you to share your thoughts and help us refine these resources further. Together, we can make meaningful progress toward equity in our work. Scan the QR Code to [provide your feedback](#).



Embedding Equity Considerations in Technical Assistance

Definition of Technical Assistance

Technical assistance (TA) refers to any form of professional help, guidance and support designed to build capacity, enabling individuals or organizations to enhance their performance and achieve their desired outcomes (e.g., grantees, government agencies and associations and groups, among others). The essential elements of technical assistance include enhancing capacity and performance by respecting individual capabilities and pace, tailoring to specific needs, offering choices and leaving decision making to individuals. Moreover, fostering collaboration and partnership, prioritizing confidentiality and trust and focusing on inclusivity and diversity are integral aspects of effective support.



Why Embed Equity in Technical Assistance

Incorporating equity considerations in technical assistance is crucial to meet the unique needs of communities, provide support to those who need it most and ensure that offerings are accessible and culturally sensitive.

A set of general and specific principles important for embedding equity in technical assistance follows. Note that the suggested strategies are not intended to be a complete list of all possible strategies that could be used.

About This Series

The series of guides that include strategies for embedding equity in research was developed by the Kansas Health Institute. This work is supported by the Equity, Inclusion, and Anti-Racism Capacity Building Grant funded by the Health Forward Foundation (HFF). The guides should not be construed as the official position or policy, nor should any endorsement be inferred by HFF.

GENERAL PRINCIPLES	
1. Strategies Before You Begin	
	1.1. Recognize that incorporating equity across every stage in your research requires substantial time and effort. Incorporate this time and the resources required into your research project’s budget at the beginning of the project. If a project has already begun, examine how strategies might be intentionally imbedded into the existing project.
	1.2. Identify the sources of funding for your research and discuss with the funder the strategies you plan to use to incorporate equity and why these are important to the research and for building trust with the community you are researching. Additionally, inform your partners and participants about the source of your funding and why they are funding your work.
	1.3. Determine how you will assess implementation and gather community feedback on the strategies selected to ensure your approach is having the desired effect of incorporating equity in research. Outline action steps to address this feedback and build capacity in any areas in which a deficit is discovered, through training, reflection and expansion of the project team.
	1.4. Assess the historical context related to your topic, community of focus or research questions. Assessing the historical context can help the research team navigate existing dynamics and understand what is already known related to the topic. During this stage, it is important to also identify what research or work is already being done related to this topic. Consider what dominant cultural narratives exist related to the topic and how varying research approaches could contribute to or challenge these narratives.
2. Strategies for Building an Inclusive Project Team	
	2.1 Assemble a project team with diverse backgrounds, experiences and perspectives to reflect different:
	2.1.a. Race, ethnicity, national origin, etc.
	2.1.b. Gender, sexual orientation, etc.
	2.1.c. Population density, such as rural areas, urban areas, suburban areas, if applicable.
	2.1.d. Socioeconomic status.
	2.1.e. Other considerations pertinent to the research and or event.
	2.2. Evaluate the need to collaborate with external agencies or community members with lived experience to enhance team diversity and representation. If need is identified, select community representatives to serve as a close partner throughout the project.
	2.3 Ensure that policies and practices are in place to create an environment conducive to the success and well-being of diverse team members.
	2.4. Promote self-awareness among team members of their identities, biases, assumptions, preconceptions and positionality. Using regular self-assessments and subjectivity statements can make the worldviews of the team more transparent. Discussing the types of biases that exist and using tools such as a critical appraisal checklist can help the research team assess for biases in a research study.
	2.5. Foster a culture of continuous learning and reflexivity within project teams, encouraging ongoing discussions and training on topics such as unconscious bias, cultural competence and the ethical implications of data analysis in diverse contexts.
	2.6. Establish transparent and inclusive decision-making processes that value input from all team members, ensuring that diverse perspectives are considered in project planning and implementation.

GENERAL PRINCIPLES	
2. Strategies for Building an Inclusive Project Team (continued)	
	2.7. Regularly assess and reflect on the team’s approach to equity, including how decisions are made and how team dynamics impact collaboration and communication.
	2.8. Foster an environment where team members feel comfortable discussing issues related to equity and diversity openly and constructively.
	2.9. Create mechanisms for soliciting feedback from team members on the equity and inclusivity of project processes and outcomes.
	2.10. Be open to receiving feedback and willing to adjust project strategies and practices to ensure a more equitable approach.
3. Strategies to Ensure Inclusive Terminology	
	3.1. Select and validate terminology and variables that are culturally competent and reflect the diversity of populations. Consider the use of culturally and linguistically appropriate services (CLAS) standards.
	3.2. Consult with stakeholders, experts and community members familiar with the issues discussed to identify and validate the relevance and sensitivity of terms used in the narrative and variables used in the data.
	3.3. Use terms that encompass a wide range of races, ethnicities, gender identities, geographies, socioeconomic statuses and other identity markers.
	3.4. Incorporate terms that allow for the exploration of intersectional identities and experiences. Understanding how overlapping identities impact people's experiences can provide deeper insights into equity issues.
	3.5. Include terms specifically related to groups that are historically excluded. This helps ensure that the data and analysis consider the needs and challenges of these populations.
	3.6. Use geographic-specific terms when relevant to capture regional disparities and local contexts. This approach can uncover inequities that occur at local or regional levels.
	3.7. Use a combination of broad and narrow terms to capture both general and specific aspects of issues. This can help in identifying both widespread and niche concerns related to equity.
	3.8. Include terms that reflect historical injustices and contexts. Recognizing the historical background of inequities can inform a more nuanced analysis. Facilitators can conduct research on this background before a project begins.
	3.9. Pilot test materials with audience members to learn how they understand the terminology used and how to incorporate their terminology.

TECHNICAL ASSISTANCE	
4. Strategies for Planning Inclusive Technical Assistance	
	4.1. Actively involve individuals who will receive technical assistance in the planning process, particularly those from historically excluded communities, to ensure their perspectives and needs are adequately represented.
	4.2. Provide fair compensation for their time and input, acknowledging the value of their contributions and encouraging their continued engagement.
	4.3. Engage deeply with technical assistance recipients to understand their vision, mission, past initiatives, successes and barriers they've faced. This understanding also should encompass the community's specific context.
	4.4. Consider the distances participants must travel and the costs of travel and lodging (if needed) when setting meeting start and end times.
	4.5. Use this comprehensive understanding to identify the unique needs, preferences and challenges of those receiving technical assistance. Adapt the training accordingly, considering:
	4.5.a. Necessary accommodations (e.g., American Sign Language [ASL] interpreters, wheelchair accessibility).
	4.5.b. Presentation of information in various formats to cater to different learning styles.
	4.5.c. Location accessibility.
	4.6. Ensure that the objectives for technical assistance align with the aspirations of the recipients. This alignment should be evident in the practical goals set for the assistance.
	4.7. Develop a goal-setting process that involves input from technical assistance recipients. This helps ensure that the set goals authentically represent and support the needs and ambitions of the recipients.
5. Strategies for Developing Inclusive Technical Assistance Curriculum	
5.1 Inclusive Content Design	
	5.1.a. Adapt curriculum content to be relevant, engaging and accessible for a diverse audience. This approach promotes a learning environment where every member of the audience feels represented and valued. To achieve this:
	5.1.a.1. Employ inclusive language, visuals and case studies that reflect a broad spectrum of experiences and identities. This ensures that all audience members can see themselves in the material and feel that their perspectives are respected. Regular training for all team members on culturally sensitive communication could be implemented to ensure consistency across all interactions and materials.
	5.1.a.2. Use terminology that is clear, avoids jargon and is culturally sensitive. This makes the content more accessible to audience members from various backgrounds and proficiency levels.

TECHNICAL ASSISTANCE	
5. Strategies for Developing Inclusive Technical Assistance Curriculum (continued)	
5.1 Inclusive Content Design (continued)	
	5.1.b. Implement accessibility features for all content, including:
	5.1.b.1. Alternative text for images to support audience members who use screen readers, enhancing the experience for those with visual impairments.
	5.1.b.2. Selection of font colors and sizes that enhance readability for audience members with visual impairments, including those who are color blind or have low vision. It's important to ensure that text contrasts well with background colors for ease of reading.
	5.1.b.3. When sharing data and graphs, ensure they are presented in an accessible and comprehensible manner. Avoid overly complex visualizations and ensure the data narrative is clear and meaningful to your audience.
	5.1.b.4. Recognize and accommodate different learning styles and needs by offering content in various formats (e.g., visual, auditory, kinesthetic). Consider the accessibility of digital platforms and tools used in delivering technical assistance.
	5.1.c. Allocate sufficient time for participants to understand and absorb information. Break down complex topics into manageable segments and schedule sessions with enough time for reflection and questions.
	5.1.d. Recognize the unique contexts and needs of different groups or individuals and tailor the assistance accordingly.
5.2 Technical Assistance Providers and Speakers	
	5.2.a. Aim to select technical assistance providers and speakers from various races, ethnicities, genders, ages, abilities, geographies (including urban/rural) and socioeconomic backgrounds. This diversity can provide a richer, more comprehensive discussion on the workshop's topics. Avoid determining individuals' identities based on the information you have encountered. Instead, invite them to share their experiences and perspectives directly, ensuring their voices are heard and respected without making assumptions
	5.2.b. Prioritize individuals who have personal experience with the workshop's focus areas. Lived experience offers invaluable insights that theoretical knowledge cannot fully capture, making the workshop more relatable and impactful for attendees.
	5.2.c. Include speakers who represent different levels of expertise, from seasoned professionals to emerging voices in the field. This variety ensures a broader range of insights and fosters an environment where different perspectives are valued and explored.
	5.2.d. Recognize the importance of intersectionality — how different aspects of identity (like race, gender, class) intersect and shape individuals' experiences. Select presenters who can speak to these complexities, offering a more nuanced and inclusive conversation.
	5.2.e. Offer fair compensation to attract a diverse range of speakers. Consider additional incentives such as travel allowances, lodging or coverage of other expenses. Develop a standardized yet flexible compensation model that can be adapted based on the level of engagement and expertise, ensuring it is equitable and competitive.

TECHNICAL ASSISTANCE

5. Strategies for Developing Inclusive Technical Assistance Curriculum (continued)

5.3 Location

	5.3.a. When planning the timing and location of events, consider the convenience for both speakers and attendees. For virtual events, think about different time zones. For physical events, consider accessibility and commuting options.
	5.3.b. Verify that entrances, exits, restrooms and seating arrangements are fully accessible, including ramps and 508-compliant facilities.
	5.3.c. Select a location accessible by public transport and provide reserved parking spots near the entrance for those with disabilities.
	5.3.d. Include sign language interpreters, assistive listening devices, high-contrast visuals and subtitles for videos to accommodate those with hearing and visual impairments.
	5.3.e. Establish clear, accessible evacuation plans and ensure easy access for emergency services.
	5.3.f. Create quiet zones for sensory breaks and cater to all dietary restrictions during refreshments and meals.
	5.3.g. Provide detailed pre-event accessibility information and actively seek participant feedback to continuously improve accessibility.

5.4 Strategies for Inclusive Evaluation of Technical Assistance Activities

	5.4.a. Involve recipients of technical assistance in the design of the evaluation framework. This ensures that the evaluation considers diverse perspectives and values different types of impact.
	5.4.b. Include specific metrics that assess the effectiveness of technical assistance in making technical assistance inclusive and accessible.
	5.4.c. Offer various ways for participants to provide feedback (online survey, paper survey).
	5.4.d. Share evaluation findings openly with technical assistance recipients, including areas for improvement and plans for addressing any identified inequities. This transparency builds trust and accountability.

REFLECTION QUESTIONS:

1. How well do our current technical assistance practices meet the unique needs of the communities we serve?
2. What steps are we taking to ensure our technical assistance offerings are accessible to all, including
3. those from historically excluded or underserved groups?
4. In what ways do we engage with and learn from the communities we aim to support?
5. How are we addressing the need for cultural sensitivity within our technical assistance offerings?
6. What mechanisms do we have in place to continually assess and refine our approach to equity?
7. How do we ensure that our project team and stakeholders are aligned in their understanding of equity considerations?

RESOURCES:

- Centers for Medicare & Medicaid Services. (n.d.). *Virtual Meetings and Webinars Accessibility Checklist*. Retrieved from <https://planetoit.cms.gov/one-pager/virtual-meetings-and-webinars-accessibility-checklist>
- College of Arts & Sciences, University of Tennessee Knoxville. (n.d.). *Best Practices for Accessibility in Planning Conferences and Meetings*. Retrieved from <https://www.utk.edu>
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- Jamieson, M. K., Govaart, G. H., & Pownall, M. (2023). Reflexivity in quantitative research: A rationale and beginner's guide. In *Social and Personality Psychology Compass* 17(4). John Wiley and Sons Inc. Retrieved from <https://doi.org/10.1111/spc3.12735>
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- National Implementation Research Network. (2023). *Equitable Implementation Guide*. Retrieved from <https://implementationpractice.org/wp-content/uploads/2023/01/Equitable-Implementation-Guide-final-1.pdf>
- Regulations.gov. (n.d.). *Accessibility*. Retrieved from <https://www.regulations.gov/accessibility>
- Trohanis T. A. Projects. (2022). *Effective Technical Assistance Practices. Legacy 50th Anniversary*. Retrieved from <https://trohanis.fpg.unc.edu/effective.asp>