

EVALUATION RUBRIC

# Equity, Diversity, Inclusion and Accessibility (EDIA)

Considerations in Research

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MSSU · USSM

Maritime SPOR SUPPORT Unit • Unité de soutien SRAP des Maritimes

# Equity, Diversity, Inclusion and Accessibility (EDIA) Considerations in Research: Evaluation Rubric

## How to use this EDIA rubric

### What this rubric is designed to do

This document outlines equity, diversity, inclusion, and accessibility (EDIA) considerations when developing research proposals, grant applications, and ultimately in conducting research. Please see the [EDIA flowchart](#) for links to relevant resources. This guide itself is not meant to serve as an exclusive resource to guide considerations around EDIA. Much more comprehensive resources exist (EDIA flowchart) which should be consulted.

### Why EDIA matters across the research process

It is important to consider how EDIA (either one or all) are relevant to your research question. These factors have been overlooked in many studies which have negatively impacted study outcomes. For examples, see: CIHR's "[Impacts of integrating sex and gender in research](#)" and the [Stanford University Gendered Innovations](#) project. EDIA should be considered in each stage of the research process, and is further outlined in this [NSERC guide](#).

### Considering team composition, disclosure and best practices

Although it is important to consider whether your team is suited to carry out the proposed research, it is not necessary to disclose or self-identify if people belong to particular population groups. An individual may choose to disclose or declare their lived experience if they would like. Regardless, concrete examples should be provided around how the team has and will develop trusting relationships, address power imbalances, form ongoing research partnerships, as appropriate to the research.

Your proposal should consider use of best practices to address identified barriers and challenges around EDIA. These practices help to ensure that these factors are deliberately and proactively considered. Many relevant examples of best practices can be found in this [SSHRC guide](#).

### Considering relevance, scope and feasibility



EDIA is always an important consideration in health research. In some cases, there may be limited opportunities to meaningfully integrate EDIA principles (e.g., due to lack of data or project constraints, context, project scope). Applicants must clearly justify the extent to which EDIA principles can be addressed.

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## How this rubric can be used

This rubric is meant to be used as a guide – either partial or in its entirety depending on the needs you have. For example, the scoring criteria could be collapsed to a smaller scale (e.g., pass, fail), or the components evaluated could be averaged to a smaller proportion of the total score (e.g., averaged to 5-points in total of a 50-point total score for the entire grant).



## Avoiding performative or tokenistic EDIA

EDIA considerations should not be included in your research solely as a means of performativity or tokenism (i.e., making your application 'look good' or including people as a symbol of diversity) without taking steps to address underlying inequities. You should ensure EDIA is discussed, and rationale is provided as to why this is not relevant, or why this is not possible to examine in your research.

## Important note for reviewers

Reviewers should assign a score based on the quality and depth of EDIA integration throughout the proposal, or strength and clarity of justification when full integration of EDIA in the proposal is not possible.

## Guiding questions to support EDIA reflection

The [SSHRC](#) guide, alongside guidance from the [National Institute for Health and Care Research](#), have identified guiding questions which may help you consider EDIA in your proposal.

- Are identity (e.g., sex, gender, race, ethnicity, disability) considerations taken into account in the research design, methods, analysis and interpretation and/or dissemination of research findings?
- Who benefits from the research findings? Have you considered which population groups might experience significant unintended impacts (positive or negative) because of the planned research?
- Are your outcomes validated and relevant to a broad range of patients in the populations that your research seeks to serve?

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## Additional resources

### Recommended training for those reviewing EDIA in grant proposals and award applications

- [CIHR Bias in Peer Review e-learning module](#)
- [Government of Canada's New Frontiers in Research Fund Best Practices Guide in EDI](#)
- [Tri-Council Policy Statement on Research Involving the First Nations, Inuit and Métis Peoples of Canada](#)
- [CIHR webinar/e-learning module on Research Involving the First Nations, Inuit and Métis Peoples of Canada](#)
- [CIHR Sex and Gender Training Modules](#)

### Recommended training, resources around EDIA and patient-oriented research

- [Alberta SPOR: Equity, Diversity, Inclusion and Accessibility in Patient-Oriented Research](#)
- [Readiness to Engage Workbook](#)

### References

1. [Government of Canada's New Frontiers in Research Fund Best Practices Guide in EDI](#)
2. [Impacts of integrating sex and gender in research – CIHR](#)
3. [Gendered Innovations | Stanford University](#)
4. [National Institute for Health and Care Research](#)
5. [NSERC guide on integrating equity, diversity and inclusion considerations in research](#)

### Acknowledgements

This resource was developed by Dr. Amy Grant, MSSU Director of Research with support from the EDIA Science Team who shared their expertise in the development of this resource. The template for this resource was adapted from the MSSU Sex and Gender team's Gender and Sex Considerations: Justification criteria for gender/ sex considerations in research and Flowchart (2023). Additionally, material to develop the EDIA rubric was guided by rubrics shared by our colleagues at the George & Fay Yee Centre for Healthcare Innovation and AbSPOR.

#### EDIA Science Team Members:

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## CRITERION: TEAM

*Demonstration of knowledge and best practices in relation to consideration of EDIA on the research team, in relationships with partners, communities, and organizations.*

Criteria Level	Description
<p><b>1</b></p> <p>No evidence of EDIA considerations</p>	<ul style="list-style-type: none"> <li>No mention of/demonstrated understanding of EDIA principles and systemic barriers in relation to the research team.</li> <li>No mention of team composition, relationships with partners, or inclusivity.</li> <li>No indication of accessibility or relational practices, even at a general level.</li> </ul>
<p><b>2</b></p> <p>Brief acknowledgment without details</p>	<ul style="list-style-type: none"> <li>Team composition or partnerships are mentioned, but without clear roles or rationale.</li> <li>No meaningful consideration of power dynamics, accessibility, or inclusion.</li> <li>No concrete strategies provided.</li> </ul>
<p><b>3</b></p> <p>Some recognition of EDIA but limited integration</p>	<ul style="list-style-type: none"> <li>Provides a general rationale for team composition.</li> <li>References inclusive practices (e.g., shared decision-making, accessibility) but details are minimal.</li> <li>Partnerships are mentioned but there is little description of how the team will work with partners.</li> <li>Full integration of EDIA considerations in team composition is limited due to scope or data constraints, with some justification provided.</li> </ul>
<p><b>4</b></p> <p>Clear evidence of EDIA awareness and action</p>	<ul style="list-style-type: none"> <li>Strong rationale for team composition and describes related processes.</li> <li>Mentions specific strategies for inclusion and equity around communication and decision-making.</li> <li>Addresses methods for readiness to engage (e.g., reflexivity, addressing power imbalances, safety).</li> <li>Describes plans for building and sustaining equitable partnerships.</li> <li>EDIA integration is meaningful and well thought out, even if full integration is not possible. The team clearly explains constraints and demonstrates concrete, inclusive practices within what is feasible.</li> </ul>
<p><b>5</b></p> <p>EDIA is thoroughly and intentionally integrated</p>	<ul style="list-style-type: none"> <li>EDIA principles are woven throughout discussion of team composition and there are established relationships with potential partners.</li> </ul> <p>Detailed, concrete strategies for:</p> <ul style="list-style-type: none"> <li>Developing trusting, respectful, two-way relationships and ongoing partnerships.</li> <li>Addressing accessibility and systemic barriers.</li> <li>Responding to power imbalances.</li> <li>Transparent, shared decision-making.</li> <li>Strong justification for why this team is well-suited to lead the research.</li> <li>When EDIA cannot be fully integrated, the team provides a well-reasoned and justified explanation of why these constraints are in place.</li> </ul> <p>The team still demonstrates strong inclusive practices, including:</p> <ul style="list-style-type: none"> <li>Clearly articulated roles</li> <li>Reflexive or power-aware practices (e.g., rotating leadership, open decision-making)</li> <li>Thoughtful engagement or communication strategies that reflect a commitment to transparency, accessibility, and respect even when EDIA is not central to the research topic.</li> </ul>

## CRITERION: OVERALL

*There is consideration of EDIA concepts appropriate to the project and research design.*

Criteria Level	Description
<b>1</b> No evidence of EDIA considerations	<ul style="list-style-type: none"><li>• No mention of EDIA relevance or concepts to proposed research.</li><li>• Applicant dismisses EDIA without rationale.</li><li>• No discussion of how dissemination strategies will consider EDIA.</li></ul>
<b>2</b> Brief acknowledgment without details	<ul style="list-style-type: none"><li>• Applicant mentions EDIA concepts but does not connect them to the research.</li><li>• Dissemination strategies do not consider EDIA.</li><li>• If EDIA cannot be fully integrated, there is no explanation of why or acknowledgment of impacts.</li></ul>
<b>3</b> Some recognition of EDIA but limited integration	<ul style="list-style-type: none"><li>• EDIA concepts are noted as relevant but lack clear rationale or application.</li><li>• Dissemination plans mention EDIA but are vague with no description of implementation.</li><li>• If full integration of EDIA is not possible, applicant provides some explanation, but it is incomplete and does not fully consider potential impacts or excluded groups.</li></ul>
<b>4</b> Clear evidence of EDIA awareness and action	<ul style="list-style-type: none"><li>• Applicant clearly explains constraints and demonstrates thoughtful strategies to promote equity, accessibility, and inclusion within what is feasible.</li><li>• Dissemination plans include specific actions to support equitable knowledge sharing (e.g., accessible formats, co-developed outputs).</li><li>• Integration is meaningful and well-developed but not comprehensive or fully consistent across all areas.</li></ul>
<b>5</b> EDIA is thoroughly and intentionally integrated	<ul style="list-style-type: none"><li>• Applicant shows a good understanding of EDIA concepts and principles in relation to their research, using appropriate terminology.</li><li>• Clear explanation of how EDIA will be considered in the study.</li><li>• Dissemination strategies are clear, detailed, and developed collaboratively to ensure accessibility and equity.</li><li>• The research has the potential to advance EDIA practices in patient-oriented research more broadly.</li><li>• If full integration is not feasible, applicant provides a compelling, well-justified explanation and demonstrates outstanding inclusive practices within what is possible.</li></ul>

Score:

## CRITERION: METHODS

*Inclusion of perspectives less heard in health research; recruitment/study sample; outcomes.*

Criteria Level	Description
<p><b>1</b></p> <p>No evidence of EDIA considerations</p>	<ul style="list-style-type: none"> <li>No mention of inclusion criteria, recruitment strategies, or sample characteristics in relation to EDIA.</li> <li>No plan to consider diverse perspectives or accommodate different participant needs.</li> <li>Outcomes selected may not be appropriate, feasible, or relevant for all participants, with no acknowledgment of this risk.</li> </ul>
<p><b>2</b></p> <p>Brief acknowledgment without details</p>	<ul style="list-style-type: none"> <li>Applicant briefly mentions the importance of diverse perspectives but provides no clear plan to support this.</li> <li>Recruitment strategies are described in general terms but not tailored to reach underrepresented groups.</li> <li>Limited attention to appropriateness of measures or outcomes.</li> </ul>
<p><b>3</b></p> <p>Some recognition of EDIA but limited integration</p>	<ul style="list-style-type: none"> <li>Applicant shows commitment to including diverse perspectives and voices less heard but does not clearly describe methods to ensure it.</li> <li>Recruitment strategies are outlined but limited in scope or not fully adapted to reach diverse populations.</li> <li>Outcomes are chosen with some consideration of cultural relevance, accessibility, or appropriateness, but justification is weak.</li> <li>Limitations related to EDIA are acknowledged (e.g., if EDIA cannot be fully integrated, or there are feasibility constraints) but implications are not well explored.</li> </ul>
<p><b>4</b></p> <p>Clear evidence of EDIA awareness and action</p>	<ul style="list-style-type: none"> <li>Applicant demonstrates thoughtful planning to ensure diverse perspectives are included, even if not all voices can be directly involved.</li> <li>Recruitment strategies are detailed, proactive, and feasible, showing clear efforts to reach underrepresented or marginalized groups.</li> <li>Outcome measures are inclusive and relevant, with rationale for choices and, where appropriate, adaptations or accommodations (e.g., modified tasks, alternative measures).</li> <li>If some EDIA elements cannot be addressed, the limitations and implications are clearly described.</li> </ul>
<p><b>5</b></p> <p>EDIA is thoroughly and intentionally integrated</p>	<ul style="list-style-type: none"> <li>Applicant describes explicit plans to engage and include voices of those who experience health issues differently, have been historically underrepresented, or face systemic barriers.</li> <li>Recruitment strategies are highly tailored and co-developed, with clear processes to build trust and ensure equitable participation.</li> <li>Outcome measures are collaboratively selected, culturally safe, and adapted as needed to be meaningful and accessible (e.g., alternative measures, modified scoring).</li> <li>Limitations are addressed critically and transparently, with plans to mitigate inequities and inform future inclusive research practices.</li> <li>When EDIA cannot be fully integrated, the applicant provides clear justification for this, and demonstrates an awareness of EDIA implications.</li> <li>Applicant describes steps taken to mitigate inequities to ensure transparency, such as reflexive analysis, sensitivity checks, or plans for future more inclusive research.</li> </ul>

## CRITERION: ANALYSIS

Considerations of how EDIA will be analyzed.

Criteria Level	Description
<p><b>1</b> No evidence of EDIA considerations</p>	<ul style="list-style-type: none"> <li>No mention of diversity factors, disaggregation, or intersectional assessment.</li> <li>No acknowledgement of potential biases or inequities in results.</li> </ul>
<p><b>2</b> Brief acknowledgment without details</p>	<ul style="list-style-type: none"> <li>Applicant mentions EDIA in analysis but provides no clear plan to incorporate it.</li> <li>No plan to disaggregate data or examine intersections of diversity factors.</li> </ul>
<p><b>3</b> Some recognition of EDIA but limited integration</p>	<ul style="list-style-type: none"> <li>Plans to disaggregate data by some diversity factors.</li> <li>Recognizes importance of assessing intersections, but statistical tests or methods are limited or absent.</li> <li>If EDIA data are not available or cannot be captured, implications are not fully discussed.</li> </ul>
<p><b>4</b> Clear evidence of EDIA awareness and action</p>	<ul style="list-style-type: none"> <li>Data will be disaggregated by multiple diversity factors where possible.</li> <li>Intersections are acknowledged and evaluated where appropriate.</li> <li>Limitations due to unavailable or incomplete EDIA data are explicitly described, and mitigation strategies (e.g., sensitivity analysis, reflexive interpretation) are provided.</li> <li>Appropriate individuals or partners in the project are engaged to guide analysis and interpretation of EDIA data.</li> </ul>
<p><b>5</b> EDIA is thoroughly and intentionally integrated</p>	<p>When full integration is possible:</p> <ul style="list-style-type: none"> <li>Data are disaggregated by all relevant diversity factors, including intersections.</li> <li>Statistical tests assess differences in outcomes across factors and intersections.</li> <li>Partners and collaborators guide the analysis to ensure culturally safe, equitable interpretation.</li> <li>Appropriate community members, or individuals with lived experience are actively involved in guiding methods, analysis, or interpretation.</li> </ul> <p>When full integration is not possible (e.g., data unavailable):</p> <ul style="list-style-type: none"> <li>Applicant provides a clear, compelling explanation for limitations.</li> <li>Demonstrates critical reflection on potential impacts of missing data and how results may be biased.</li> <li>Describes strategies to mitigate inequities in interpretation, including transparency and future research plans.</li> </ul> <p>In all cases:</p> <ul style="list-style-type: none"> <li>The approach demonstrates leadership in integrating EDIA principles and can inform best practices in inclusive research analysis.</li> </ul>

Score: