



UNITÉ DE **SOUTIEN**
SSA | QUÉBEC

Ensemble pour un système de santé qui apprend

Applying an Equity, Diversity, and Inclusion (EDI) Approach with Sensitivity

A Comparative Analysis Based on Sex and Gender-Based Analysis (SBGA)

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Axe 1 - Valuation of data

Equity, Diversity and Inclusion Subcommittee

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Stratégie de recherche axée sur le patient
SRAP
Le patient d'abord

IRSC CIHR
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The **mission and values of the Unité de soutien SSA Quebec** stem from a patient-oriented strategy (PARS). This strategy engages the people who use the health-system and their loved ones, care and service providers, and managers as partners in the research process. One of the challenges of the **learning-based, inclusive, and effective** health systems is to understand the varied experiences of the people who use them.

To this end, many academic, governmental, and community bodies have adopted mandated focussed on **equity, diversity, and inclusion (EDI), and sex and gender-based analysis (SGBA)**. These require research teams to meet specific criteria when submitting a grant application.

At the same time, many granting agencies now incorporate EDI and SGBA consideration into their instructions for research teams seeking to submit project proposals. For example, when submitting a proposal to the Canadian Institutes of Health Research (CIHR), it is required to:

1. Answer identification questions: [Equity, Diversity, and Inclusion Self-Identification Questionnaire](#)
2. Answer the following questions:
 - a. Please describe **how sex and/or gender considerations** will be included in your research proposal, or explain why sex and/or gender considerations do not apply to your research proposal;
 - b. How will you ensure that **equity, diversity, and inclusion are incorporated into the program design?**

Following this premise, this document aims to help research teams approach EDI and SGBA considerations with sensitivity.

For the purposes of this document, EDI refers to three distinct but closely interrelated concepts—equity, diversity, and inclusion—thus contributing to consideration of the intersecting and ethical issues of diverse experiences of populations within the context of care- and outreach-service trajectories.

A sensitive approach to EDI aims to raise awareness of the complexity of the intersecting dynamics of determinants rooted in a historical, social, economic, and cultural context that manifest in the construction of multiple identities, each with their own diversity.

In conjunction with EDI considerations, sex- and gender-based analysis (SGBA) is “an analytical process used to assess how diverse groups of women, men, girls, boys and gender-diverse people may be impacted by Government of Canada initiatives” (CIHR).

Such sensitivity to EDI and SGBA is thus contingent on the adoption of concrete strategies for generating new knowledge and developing innovative interventions that directly address clinical, population, organizational, and structural challenges with and for the populations involved.

This document complements those available online in Quebec, Canada, and internationally.

It was developed as the result of a review of the guidelines and best practices that support research teams in applying for EDI- and SGBA-responsive funding.

The added value of this document lies in the **alignment of best practices with Unité de soutien SSA Québec guidelines**.

This document offers **EDI and SGBA** considerations at the intersection of social determinants of health embedded in the differentiated trajectories of study populations.

A list of resources related to EDI and SGBA considerations in research (scientific articles, action plans, guidelines, among others) is available at the end of the document.

Here are some suggested EDI and SGBA considerations to incorporate throughout a project proposal:

Description of the Team in its Ecosystem

- Identify and justify **the added value brought by the expertise of each member** of the research team, including patient partners¹, based on the diversity of expertise;
- Illustrate the **strategies that were used to form the research team** based on the diversity of expertise and the research / intervention / knowledge-sharing / data-enhancement objectives / hypotheses in a real understanding of partnership within the team;
- Propose **mitigation strategies** to ensure a diversity of expertise in the research team;
- Identify the **strategies implemented** (and those to be implemented) to inform the team members of the issues of sex, gender, diversity, equity, and inclusion.

- Many funding bodies require researchers to complete one of the [three online training modules](#) designed by the **CIHR Institute of Gender and Health**, depending on the relevance to the research area.

Certificate(s) of completion of the training modules must be attached to the grant application:

- *Sex and Gender in Biomedical Research*;
- *Sex and Gender in Primary Data Collection with Human Participants*;
- *Sex and gender in the Analysis of Secondary Data from Human Participants*.
- Sex- and gender-inclusive initiatives for research projects have been developed and backed by the Unité de soutien SSA Québec:
 - [Creation guide for a composite gender score](#) to indirectly measure gender in human research (in French);
 - [Questionnaire for measuring gender in human research](#) to measure self-reported gender identity, gender roles, and sexual orientation in research.
- *EDUlib* offers a short training session on the issue of gender identity:
[Trans•diversité 2 : santé et services sociaux](#) (in French);
- The Faculty of Business Administration at Université Laval offers a [training session on equity, diversity, and inclusion in research and grant applications](#) (in French).

¹ A person who has experienced or is living with a health condition who participates as a mutual researcher in all research activities intended to improve care in and accessibility to social services ([Unité de soutien SSA Québec - Are you a patient?](#))

Adoption of Epicene and Inclusive Writing

Based on an **inclusive approach that is sensitive** to the ethical complexities and **differentiated** trajectories of the people in the research or intervention population.

Word choice:

- **Define** the term to be used in order to refer to a “patient partner”;
- **Propose** definitions of “sex,” “gender,” “equity,” “diversity,” and “inclusion” that are tailored to the concern, the population of interest for the research or intervention, and the research or intervention objectives/hypotheses/research questions²;
- **Identify and define** the population of interest for the research or intervention with the patient partners whenever possible;
- **Insert, according to the case figures, a statement** that:
 - different terms exist and can be used to refer to a population concerned by the research or intervention;
 - some of these terms may not reflect how some people in this population define themselves.
- **Report** the actual contribution of patient partners to mitigate the risk of stigmatization and generalization in word choice.

Background / Research Concern

- Justify and illustrate the involvement of a patient partner(s) in the steps related to the research context / concern;
- Explain how the research context / concern reflects the **diversity of challenges within the same** research or intervention **population**;
- Explain the links to the **social determinants of health**³ to contextualize, to the extent possible, the realities and trajectories of the target population;
- Identify elements of the research context / concern that could induce the risk of **stereotypes or assumptions** related to:
 - the population itself;
 - how the population is / could be exposed to the research concern.
- Explain how these stereotypes or assumptions will be circumvented in the steps of the study;

² On this subject, see the presentation series [Developing and applying Methods of Sex/Gender Analysis in Research for SDGs](#).

³ See <https://www.inspq.qc.ca/exercer-la-responsabilite-populationnelle/determinants-de-la-sante>, and S. Haering et al. [Higher risk – less data: Challenges to sex and gender considerations in trauma research](#).

- When writing the research paper, be sensitive to:
 - **biases induced** by the data collection instruments⁴;
 - the **risks of generalizing** the perceptions and needs reported by the population concerned by the research or intervention;
 - the fact that the **realities and experiences** in accessing and providing health care and services are **unique**;
 - the fact that the **realities and experiences** in accessing and providing care may be **perceived differently** by the various people involved in the research project.
- **Propose mitigation strategies** to ensure diversity sensitivity based on the research objectives / hypotheses / intervention / research questions;
- Illustrate the extent to which the evidence supports differences in the trajectories and experiences of those involved in the research or intervention;
- Specify whether and how the research concern was shaped by **policies** or **best practice guides** for integrating an **EDI/SGBA** perspective.

Research or intervention objectives, hypotheses, and/or research questions:

- Define **keywords** in the literature review to ensure **inclusiveness** in addressing the challenges of the population being researched or experiencing the intervention⁵;
- When selecting relevant literature, consider:
 - the diversity of challenges within the target population;
 - mitigation strategies from the perspective of **inclusiveness** when taking into account the challenges of the research or intervention focus population;
- Justify how the research objectives / hypotheses or intervention, and/or research questions will make it possible to create a **study that will benefit a specific population**;
- Specify, if applicable, whether there is a possibility that other populations may be affected/impacted by unintended consequences of this research.

⁴ P. N. Venkit et al., [A Study of Implicit Language Model Bias Against People with Disabilities](#) (work published in S. Wilson), [Measuring Sex, Gender and Sexual Orientation](#) as well as the [Guidelines for Using Race and Aboriginal Identity-Based Data Collection Standards and Aboriginal Identity for Health Reporting in Canada](#).

⁵ B. Vissandjee et al. (2017). [Searching for sex- and gender-sensitive tuberculosis research in public health: finding a needle in a haystack.](#)

Ethical Considerations

- Explain how **free and informed consent** has been respected, in a way that is tailored to the specifics of the population targetted by the research or intervention, including the following contexts:
 - language gap;
 - literacy level;
 - specificity according to cultural norms and values;
 - situation of physical or intellectual disability.
- Specify whether the people involved are experiencing **vulnerability**, particularly **structural vulnerability**⁶, to better situate the research team's position. Structural vulnerability may be the result of an interaction between certain demographic attributes such as the person's sex, gender (to be defined according to the context: sexual identity / social relations in a given group), socioeconomic status, membership/values associated with a cultural group, region of residence, and attributed statuses related to a person's position in certain social, cultural, and political hierarchies;
- Specify the strategies that will be used to ensure the protection of their interests in a way that is adapted to their specific realities and trajectories;
- If the **topic is sensitive or could be detrimental** to the participants' emotional or psychological well-being, provide a list of resources, adapted to the specific participants, which they can use as needed;
- Clarify the **balance between the harms and benefits** of participating in research aiming for **inclusiveness** in addressing the challenges of the population of interest for the research or intervention.

Recruitment Process for Participants / Patient Partners

- Justify and illustrate how the process of recruiting participants will ensure that the **sample is as representative and inclusive as possible in terms of the diversity of the population** to be studied by the research or intervention;
- Explain how the participant recruitment actions are **intersectional**;
- Specify the **anticipated** sample of participants, and justify how it is appropriate from the perspective of collecting data that **captures the diversity within a given population** (diversity in trajectories [context related to social determinants of health], as well as diversity based on sex and gender, depending on the research objectives / hypothesis / intervention / research questions);

⁶ Chung, R. (2021). [Structural health vulnerability: Health inequalities, structural and epistemic injustice.](#)

- Clarify the **limitations** and detail how the **recruitment** process will be **inclusive and sensitive to the different realities** in the target population. Some examples of deliberate exclusion or inclusion from an EDI and SGBA perspective:
 - people who do not have a good command of French or English;
 - people with limited digital or health literacy;
 - people who are not able to travel long distances or to take time off work to attend a research or intervention activity.
- Specify and justify whether **compensation** will be provided to **participating individuals** for their contribution to the research activities by answering the following questions:
 - What kind of compensation is offered?
 - How was the nature of the compensation determined given the diversity of the trajectories and life contexts of the participants?
 - To what extent will the type of compensation or stipend prevent any form of potential risk associated with participating in this research or intervention?
- Explain, justify, and illustrate the involvement of patient partner(s) in the steps related to the methodology and recruitment process of the research or intervention project;
- Specify and justify whether **patient partners** will be given **compensation or a stipend** for their contribution to the research activities, by answering the following questions:
 - Will you be offering compensation or reimbursement? Justify the choice.
 - What kind of compensation or stipend is being offered?
 - If compensation is provided, will it be commensurate with the level of involvement of the patient partner in the research activities? Or will it be a fixed amount for all patient partners?
 - How was the type of compensation or stipend determined given the diversity of the trajectories and life contexts of the patient partners?
- To what extent will the compensation or stipend prevent any form of potential risk associated with participating in this research or intervention?

Data Collection

- For each question, include an option for the person to decline to answer;
- Depending on the nature of the question, allow the participant to either check off more than one answer or to enter an answer that differs from the choices offered (i.e. insert an “other” option);
- For each data collection activity, provide a rationale for how the nature of the activity and the process will be tailored and sensitive to the particularities of the population being researched or experiencing the intervention;
- Specify and justify who will be conducting the data collection activities when applicable:
 - If the person is not part of the research team, indicate how the person will be recruited, what characteristics will be sought, how involving an external person in data collection will add value, and the strategies that will be used to sensitize the person to issues related to sex, gender, diversity, equity, and inclusion.

Mitigation strategies:

For each potential bias identified, elaborate, to the extent possible, on the following:

- Does this bias affect all participants? If not, which participants are the most likely to be affected by this bias (illustrating the connections to the characteristics of the research/intervention population)?
- What are the potential effects/impacts associated with this bias, both for the participants involved and for the study itself?
- What strategies will be used to watch for, mitigate, and document this bias?

Analysis and Interpretation of Data

- Develop and discuss a data analysis plan for an outcome beyond “descriptive” results;
- Conduct, if relevant to the research or intervention objectives / hypothesis / research questions, a cross-sectional analysis to illustrate the intersections between the sociodemographic data and the experiences of the individuals involved in the research or intervention⁷;
- Clarify strategies for mitigating the risk of bias in statistical, narrative, or modelling analyses;
- Discuss how the overall quality of the study is enhanced by taking a sensitive approach to EDI/SGBA issues.

⁷ A. Lacasse et al. [Conducting gender-based analysis of existing databases when self-reported gender data are unavailable: The GENDER Index in a working population.](#)

Sharing Knowledge / Research or Intervention Results

A collective effort to reach and include the population concerned by the research or intervention.

Diversified strategies to ensure awareness of EDI and SGBA: workshops, games, information/training sessions, capacity building of future generations with a sensitivity to include the diverse experiences of the Quebec population:

- For each knowledge sharing strategy / research or intervention results, specify how the challenges of linguistic diversity within the research or intervention's population of interest will be addressed;
- From the perspective of intersectoral collaboration, identify community resources that provide services to the populations targeted by the research or intervention in order to:
 - lead activities to share the results;
 - promote result-sharing activities;
 - reach people who would benefit from the results of the research or intervention.
- Involve authors to illustrate the diversity of expertise relevant to the research or intervention topic that is needed to write a scientific article;
- Explain how patient partners and/or individuals affiliated with community resources contributed to the research or intervention and/or the writing of the scientific article;
- Recognize the contributions of patient partners in one or more of the following ways:
 - list them as co-authors of the article;
 - add an acknowledgement with the names of patient partners who contributed to the research or intervention discussed in the scientific article.

Resources

- **Unité de soutien SSA Québec**
 - Unité de soutien SSA Québec - [Adoption de la rédaction inclusive et épiciène](#)
 - Unité de soutien SSA Québec - [Partenariat patient/public/organisationnel](#)
 - Unité de soutien SSA Québec - [Recherche Participative Organisationnelle \(RPO\)](#)
 - Unité de soutien SSA Québec - [Pratiques inclusives en recherche participative ou en partenariat avec des personnes en situation d'exclusion sociale](#)
- **Centre d'excellence sur le partenariat avec les patients et le public** - [Livre blanc sur le partenariat avec les patients et le public](#)
- **Alberta SPOR Support Unit** - [Patient Engagement in Health Research: A How-to Guide for Researchers](#)
- **Arthritis Research Canada** - [Workbook to guide the development of a Patient Engagement In Research \(PEIR\) Plan](#)
- **Bamberger, E. T. et Farrow, A. (2021).** [Langage for Sex and Gender Inclusiveness in Writing](#) (Proposition de termes pour un langage inclusif dans une perspective de sexe et de genre)
- **Can-SOLVE CKD Network** - <https://cansolveckd.ca/wp-content/uploads/2018/07/patient-engagement-toolkit.pdf>
- **Canadian Foundation for Healthcare Improvement** - [Diversity in Patient Engagement Learning Exchange: Linking Lessons Learned](#)
- **Chaire pour les femmes en sciences et en génie** - [Writing and Evaluating Letters of Recommendation](#)
- **Chung, R. (2021).** Structural health vulnerability: Health inequalities, structural and epistemic injustice. *Journal of Social Philosophy*, 52(2), 201-216. <https://doi.org/10.1111/josp.12393>
- **Conseil de recherches en sciences humaines** - [Guide pour l'intégration de considérations relatives à la diversité dans la conception de la recherche à l'intention des candidates et candidats aux bourses de doctorat et aux bourses postdoctorales](#)
- **Conseil de recherches en sciences naturelles et en génie du Canada** - [Considérations en matière d'équité, de diversité et d'inclusion à chaque étape du processus de recherche](#) (des exemples de questions à se poser lors de l'élaboration de la question de recherche et de la conception de la recherche selon une perspective EDI)
- **Conseil de recherches en sciences naturelles et en génie du Canada** - [Guide du candidat : Tenir compte de l'équité, de la diversité et de l'inclusion dans votre demande](#) (Q7 :Comment puis-je montrer que j'ai pris en compte le sexe, le genre et la diversité dans ma demande?)
- **EDUlib** - [Trans•diversité](#) (Formation sur l'identité de genre et la transidentité)
- **Eugène, F., Pulido, B., Brière, S. et Langelier, È. (2021)** - [Formation en Équité diversité et inclusion en recherche et pour les demandes de subvention.](#)
- **Femmes et Égalité des genres Canada** - [Cours d'introduction à l'analyse comparative entre les sexes plus](#)

- **Fonds de recherche du Québec** - [Principes guidant l'approche des Fonds: Diversité vaste et intersectionnelle](#)
- **Fonds de recherche du Québec** - [Stratégie en matière d'équité, de diversité et d'inclusion 2021-2026](#)
- **Fonds Nouvelles frontières en recherche** - [Pratiques exemplaires en matière d'équité, de diversité et d'inclusion en recherche](#) (Section Équité, diversité et inclusion dans les demandes présentées)
- **Gendered Innovations in Health & Medicine, Engineering and Environment** - Formulating Research Questions - <http://genderedinnovations.stanford.edu/methods/questions.html>
- **Groupe en éthique de la recherche** - [Chapitre 4 : Justice et équité dans la participation à la recherche](#) (Article 4.1 - Principe de justice dans l'implication ou l'exclusion de certaines personnes ou groupes de personnes dans la participation à la recherche)
- **Institut canadien d'information sur la santé (2022)** - Directives sur l'utilisation des normes de collecte de données fondées sur la race et l'identité autochtone pour la production de rapports sur la santé au Canada. Ottawa : ICIS. <https://www.cihi.ca/fr/donnees-fondees-sur-la-race-et-lidentite-autochtone>
- **Institut de la santé des femmes et des hommes - Instituts de la recherche en santé du Canada** - [Critères servant à l'évaluation de l'intégration du sexe et du genre](#)
- **Institut national de la recherche scientifique** - [Inclusivement vôtres! Guide de rédaction inclusive](#)
- **Institut national de santé publique** - [Exercer la responsabilité populationnelle](#)
- **Instituts de recherche en santé du Canada** - [Comment intégrer le sexe et le genre à la recherche.](#)
- **Instituts de recherche en santé du Canada** - [Les préjugés et le processus d'évaluation par les pairs](#) (Stratégies d'atténuation de préjugés inconscients)
- **Instituts de recherche en santé du Canada** - [Points à considérer lorsqu'une rétribution est accordée à des patients partenaires en recherche](#)
- **Instituts de recherche en santé du Canada** - [Strategy for Patient-Oriented Research Patient Engagement Framework](#)
- **Kitson, A., Powell, K., Hoon, E., Newbury, J., Wilson, A. et Beilby, J. (2013).** [Knowledge translation within a population health study: how do you do it?](#) *BMC Implementation Sc.*, 8(54), 1-9.
- **Lacasse, A., Pagé, M. G., Choinière, M., Dorais, M., Vissandjée, B., Nguena Nguéfack, H. L., Samb, O. M., Vanasse, A., on behalf of the TORSAGE Cohort Working Group (2020).** Conducting gender-based analysis of existing databases when self-reported gender data are unavailable: the GENDER Index in a working population. *Canadian Journal of Public Health*, 111(2), 155-168. <https://doi.org/10.17269/s41997-019-00277-2>.
- **Leclerc, B.-S.** - [Treize erreurs courantes de langue française à éviter lors de vos présentations orales](#)
- **Lundine, J., Bourgeault, I. L., Glonti, K., Hutchinson, E., & Balabanova, D. (2019).** "I don't see gender": Conceptualizing a gendered system of academic publishing. *Social Science & Medicine*, 235. <https://doi.org/10.1016/j.socscimed.2019.112388>.

- **National Academies of Sciences, Engineering, and Medicine** (2022). *Measuring Sex, Gender Identity, and Sexual Orientation*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/26424>
- **National Institute for Health Research** - [Diversity and inclusion: What's it about and why is it important for public involvement in research?](#)
- **Roche, P., Shimmin, C., Hickes, S., Khan, M., Sherzoi, O., Wicklund, E., Lavoit, J. G., Hardie, S., Wittmeier, K. D. M. et Sibley, K. M.** (2020). Valuing All Voices: refining a trauma-informed, intersectional and critical reflexive framework for patient engagement in health research using a qualitative descriptive approach. *Research Involvement and Engagement*, 6 (42),1-13. <https://doi.org/10.1186/s40900-020-00217-2>
- **Schrauder, M. et al.** (2019) - [Developing and Applying Methods of Sex/Gender Analysis in Research for SDGs.](#)
- **Simon Fraser University** - [Inclusive and antiracist writing overview](#)
- **Université de Montréal** - [Inclusivement - Guide d'écriture pour toutes et tous](#)
- **University of British Columbia** - [Inclusive Language Resources](#)
- **Vissandjée, B., Mourid, A., Greenaway, C., Short, W. E. et Proctor, J.** (2016). Searching for sex- and gender-sensitive tuberculosis research in public health: finding a needle in a haystack. *International J. of Women's Health*, 8(8), 731-742. <https://doi.org/10.2147/IJWH.S119757>.
- **Women and Gender Equality Canada.** (2022). [Canada's First Federal 2SLGBTQI+ Action Plan... Building our future, with pride.](#)

EDI / SBGA Action Plans

Université de Montréal

[Plan d'action Pour l'équité et l'inclusion 2020-2023 Place aux Premiers Peuples : Plan d'action 2020-2023](#)

Vice-rectorat à la recherche, à la découverte, à la création et à l'innovation

[Plan d'action : Recherche, découverte, création et innovation 2022-2027](#)

Université Laval

[Planification stratégique 2017-2022 : La différence Université Laval](#)
[Plan d'action : Équité, diversité et inclusion - Programme des Chaires de recherche du Canada](#)

Université de Sherbrooke

[Plan stratégique 2018-2022 : Oser transformer](#)

McGill University

[Equity, Diversity & Inclusion \(EDI\) Strategic Plan 2020-2025 Our Words Matter](#)

Concordia University

[Plan d' action en matière d'EDI](#)

Université Ottawa

[Equity, Diversity and Inclusion in Research: Continuing our Journey EDI Action Plan for Research](#)

Réseau interuniversitaire québécois pour l'équité, la diversité et l'inclusion (RIQEDI)

[Intégration et promotion des valeurs d'équité, de diversité et d'inclusion dans les organisations québécoises](#)

Université du Québec à Montréal

[Plan d'action de l'UQAM 2021-2026 : Poursuivre l'engagement avec les premiers peuples](#)

Université du Québec en Abitibi-Témiscamingue

<https://www.uqat.ca/uqat/edi/>

Université du Québec à Chicoutimi

[Plan d'action institutionnel en matière d'équité, de diversité et d'inclusion \(EDI\)](#)