Equitable Research Partnerships Toolkit

Tool 17: Partnership Equity Check

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The Partnership Equity Check is a questionnaire that asks about equity in ten aspects of a partnership. It is designed to be completed by individual members of a research partnership, so that the results recorded can be compared. The results for different individuals or groups (e.g. Northern versus Southern partners) are then plotted on a Spidergram, so that any discrepancies in equity assessments, and/or areas where equity needs to be addressed, are visualised.

Why use the Partnership Equity Check tool?

The Partnership Equity Tool is designed to create a space and time for explicitly thinking about equity in different aspects of a partnership. This tool addresses equity by:

1. Assessing how equitable a partnership is, from different members' perspectives.
2. Developing mutual understanding of how various members perceive equity within the partnership, and awareness of divergent perspectives.
3. Creating awareness of where equity within the partnership could be improved.

When to use the Partnership Equity Check tool?

Phase	Rating	Descriptions
Planning	•••	Use the tool in the partnership and research **planning** phase to assess equity of the planned research partnership.
Implementing	••	During the **designing and implementing** phases the tool might be used to collect equity assessment data from individuals periodically, or to assess specific criterion, such as Criterion 8- Process.
Disseminating	•	In the **impact and dissemination** stage, assess criterion 10 and/or add other impact and dissemination criteria to the assessment form.
Sustaining	••	The Partnership Equity Check can also be used for **evaluating** how equitable a partnership has been.

Ratings
••• Designed for this stage | •• Can be used as is in this stage | •Can be adapted for use in this stage

How long does it take to use the Partnership Equity Check tool?

Rapid approach

- The questionnaire component of the tool can be used independently by any member of the partnership. They can perform a quick assessment of which aspects of the partnership are working well, and which could be improved.
- If time is short, a subset of the criteria in the Partnership Equity Check can be examined and discussed. For example, examining a single criterion might take just 30 minutes.

Intensive approach

- When resources are available, the Partnership Equity Check Tool is ideally used in a group setting and a spidergram is created. Partners then come together to discuss the results of the independent assessments, and any differences in assessments of equity between partners. This might take two to four hours, depending on the depth of discussion and extent of divergent perspectives.

What other resources do you need to use the Partnership Equity Check tool?

- Partnership Equity Assessment Questionnaire and Spidergram template.
- Face-to-face or virtual meeting space
- A facilitator who may be one of the research partners

How to use the Partnership Equity Check tool?

Preparation for group session

1. Agree on the criteria that will be used to assess partnership equity. To ensure completing the tool is feasible, agree on no more than 10 criteria to be assessed. You could use:
    a. The 10 criteria suggested below and included in the Partnership Equity Check Questionnaire template.
    b. A subset of these criteria that is most relevant to your partnership.
    c. Criteria that partners develop based on relevance to their partnership.

2. Modify the Partnership Equity Assessment Questionnaire template by modifying the criteria, if desired (optional).

3. Distribute the questionnaire to members of the partnership via email or a shared drive. If email is used the facilitator will need to transfer all answers into the same template as they are returned.

4. Ask each partner involved in the assessment to independently score each question, for each criterion, and make comments explaining their score.
   a. As the scores are entered, they will be used to automatically create the spidergram.

Group session

5. The group session can occur face-to-face or virtually.

6. Display the completed spidergram so that participants can see the scores provided by different members of the partnership.

7. Discuss any discrepant results, e.g. those criteria in which individual partners, or Globally Northern and Southern partners gave significantly different scores.

8. Discuss any results that indicate low levels of equity in an aspect of the partnership.
   a. Why this ranking?
   b. What can be done to improve equity in the future?

9. Divide into small groups to brainstorm actions that might be taken to improve equity in various criteria.
   a. Other smaller groups could focus on different criteria.
   b. Focus on criteria which received low or discrepant equity scores.
   c. Ask each small group to detail their action ideas:
      i. Use poster paper or electronic posters depending on the meeting format.
      ii. Groups could create a list, mind map or any other representation of their ideas.

10. Reconvene the entire group:
   a. Ask someone from each small group to briefly present the action ideas the group developed.
   b. The facilitator could document these to compile a single list.

c. After the presentations, the group should discuss the ideas, including whether they are feasible to implement.
d. Document any actions that would be feasible and acceptable to take, and/or include in the research grant proposal.
e. Nominate people to act on these ideas.

Suggested questions to explore when using the Partnership Equity Check tool

The primary questions for this tool are embedded in the Partnership Equity Check Questionnaire template.

Tips for using the Partnership Equity Check tool

- In the early stages of a partnership, partners with limited power may not be comfortable to identify issues with equity. Creating a way that partners can submit responses anonymously might be useful.
- Submit the results of your assessments to support claims about equity within the partnership with funding applications.
- Do not add or delete row from the Partnership Equity Check Questionnaire template, as this may interfere with the Spidergram data table.

Expected outputs and outcomes from using the Partnership Equity Check tool

Outputs

Using the Partnership Equity Assessment Questionnaire will produce:

- A set of data that captures assessments of equity at one or multiple points in time.
- A spidergram visualising the equity assessment scores.

Outcomes

- Improved awareness of equity, in different aspects of the research, and different perspectives regarding what constitutes equity and how equitable a partnership is.

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Completed example of the Partnership Equity Check tool

Download the Partnership Equity Check Questionnaire Completed Example.

The completed example details a partnership in which a Globally Northern partner assesses equity to be higher than the Globally Southern partner. These differences are visualised on the spidergram. Reading the comments provided by each partner provides insights into the reasons for the different assessments (select the sheets labelled 'Northern Partner' and 'Southern Partner' to see these comments). At least some of the differences are explained by different perceptions of what constitutes equity, which would be fruitful to discuss in group session.

References and further reading for the Partnership Equity Check tool

- This tool has been adapted from the Partnership Health Check tool in Woodhill, J., H. Brouwer, and H. ten Hove. 2021. IFAD Partnering Toolkit: Practical Tools for Strengthening IFAD's Partnerships. Available from: https://research.wur.nl/en/publications/partnering-toolkit-practical-tools-for-strengthening-ifads-partne