

A Practical Guide to Inclusive Research

Equity, Diversity, Inclusion and
Accessibility (EDI-A) Principles



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Introduction

Research is built through the collective contributions of many people over time. Meaningful discoveries and advancements are not the result of a single perspective, but of diverse experiences, expertise, and ways of knowing.

At Can-SOLVE CKD, we recognize that when more people can contribute meaningfully to research, the work becomes more relevant, inclusive, and impactful. This is why the principles of **Equity, Diversity, Inclusion, and Accessibility** (EDI-A) are foundational to our approach.

To strengthen EDI-A across our network, we engaged patient partners, researchers, and staff to identify opportunities for growth. This included a network-wide audit conducted between June 2023 and January 2024, where members reflected on EDI-A strengths and areas for improvement.

From this process, we identified **10 key recommendations** and developed a series of practical “How-to” checklists to support their implementation. These resources were reviewed by a diverse group of EDI-A Advisory Council members, whose insights helped ensure the guidance is relevant, practical, and grounded in lived and professional experience.

We encourage research networks and other organizations to adapt and use these resources in ways that reflect their own contexts and communities. By sharing and building on these approaches, we can continue to strengthen inclusive and equitable research practices.



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How To Foster Diverse Representation

- Identify Under-Represented Groups**
Ask 'whose perspective is missing?' and 'how will the absence of their perspective impact our work?'
- Engage Relevant Community Partners**
Engage community partners early in the process to ensure relevance and inclusivity. For example, collaboration could include co-hosting events, cross-promotion on social media, and review of materials to ensure they align with community needs.
- Recognize Biases**
Many people hold unconscious biases. For example, we may be more likely to view people with similar traits as us favourably (affinity bias) or believe people of a certain gender are better at a given job (gender bias). Training the people responsible for hiring/recruitment to recognize and address these biases can support more diverse representation.
- Tailor Recruitment Materials**
Develop materials that resonate with diverse audiences, considering language, visuals, and messaging. Try posting engagement opportunities on diverse platforms, including platforms specifically for audiences you would like to attract (e.g., www.bipocjobs.ca or www.ableandavailable.ca).
- Provide Mentorship, Development, and Training Opportunities**
Recruit people with different levels of experience, including those who would benefit from mentorship and training. Focus less on education and more on skills and aptitude when recruiting.
- Use Inclusive Language**
Choose wording that respects diversity in gender, culture, ability, and lived experience. In health research, this includes using person-first language (e.g., "people living with kidney disease" rather than "kidney patients") and gender-inclusive terms (e.g., "chair" instead of "chairman"). Inclusive language helps reduce stigma, signals respect, and makes research opportunities more welcoming to diverse communities.
- Make It Easy To Participate**
Provide flexible options for participation that fit different needs, such as varied meeting times, scheduling that accounts for diverse cultural celebrations, virtual or in-person participation, and accessible accommodations.
- Foster a Welcoming Environment**
Equip all network members with training in cultural competency and inclusive language to help create a safe environment that encourages sustained engagement and retention of diverse participants.
- Set Clear Diversity Goals and Accountability Metrics**
Use demographic data and feedback surveys to measure and track progress on your diversity efforts.



How To Address Workload Balance and Other Concerns

- Plan Ahead**
Before engaging new team members in a project, discuss feasible workload, timelines, and expectations, including anticipated peak periods of activity.
- Distribute Tasks**
Ensure tasks are shared appropriately across the team, recognizing different roles, capacity, skills, and lived experience.
- Provide Resources**
Offer practical supports for task management where appropriate, such as project management tools, administrative assistance, and clear documentation.
- Assess Workload Regularly**
Check in routinely using informal conversations, email, or surveys to understand workload pressures and emerging challenges.
- Adjust as Needed**
Be prepared to adapt meeting frequency, duration, communication approaches, or timelines in response to workload feedback.
- Allocate Enough Time**
Ensure patient partners and team members are given sufficient time to review materials, reflect, and provide meaningful feedback.
- Ensure Flexibility**
Offer alternative ways to gather feedback if patient partners cannot attend a scheduled meeting or would like to provide feedback privately.
- Prioritize Wellbeing**
Encourage breaks, flexibility, and respect for work-life balance, recognizing that health, caregiving, and work demands may fluctuate.
- Encourage Openness**
Foster a culture where team members feel safe raising workload concerns without fear of judgment, dismissal, or negative consequences.
- Plan for Disruptions**
Develop strategies to manage workloads, sick leave, or unfilled roles (e.g., engaging more than one patient partner per project to ensure continuity of the patient voice).



How To Improve Onboarding for New Members

- Use an Onboarding Checklist**
Develop an onboarding checklist that includes essential resources, introductions, and training supports.
- Provide a Welcome Package**
Share a comprehensive welcome package outlining the network or project's purpose, goals, expectations, timelines, and available supports.
- Offer Orientation Sessions**
Schedule a team-wide orientation to walk new members through key processes, structures, governance, and expectations.
- Facilitate Team Introductions**
Arrange a team-wide introduction to help new members understand who is involved, how roles connect, and how work is coordinated.
- Provide Context on Past Activities**
Ensure new team members joining mid- or late-stage projects receive a clear summary of relevant past activities, decisions, and progress.
- Clarify Roles and Responsibilities**
Clearly outline expectations, including responsibilities, anticipated time commitment, duration of engagement, and decision-making roles.
- Identify Accommodation Needs Early**
Proactively ask about and plan for individual accommodation needs related to health, caregiving, technology access, communication preferences, and scheduling. Check in to see how accommodation needs may change over time.
- Establish a Mentor or Buddy System**
Assign a mentor or buddy during the initial onboarding period to provide guidance, answer questions, and offer informal support.
- Provide Accessible Training Materials**
Ensure all training materials are easy to access, use plain language, and are available in multiple formats to suit learner needs whenever possible.
- Gather and Use Feedback**
Build in opportunities to regularly gather feedback and refine the onboarding process based on new member experiences.
- Discuss Compensation and Recognition**
Clearly explain honoraria, reimbursement processes, authorship opportunities, and recognition practices early in the onboarding process.
- Plan for Transitions**
Ensure all training materials are easy to access, use plain language, and are available in multiple formats to suit learner needs whenever possible.



Expand Safety and Cultural Safety Training

- Identify Key Areas**

Identify physical, psychological, bias-related, and organizational safety risks in your research context (e.g., lab safety, privacy/confidentiality). This includes cultural safety needs, which involve awareness of cultural histories, power dynamics, and inclusive practices that foster respect and belonging for Indigenous partners and other equity-seeking groups.
- Implement a Training Program**

Create and/or adopt a cohesive curriculum covering risk management, emergency response, psychological safety, respectful partnerships (including cultural safety), and equitable engagement practices.
- Integrate Cultural Safety Concepts**

Include accessible training on cultural safety and cultural humility as core elements of your program. Offer modules that address the historical and ongoing impacts of colonization (e.g., San'yas training), unconscious bias, and respectful engagement practices (e.g., OCAP® principles). Ensure materials reflect Two-Eyed Seeing—valuing multiple ways of knowing and doing in research and partnership work.
- Offer Refresher Courses and Ongoing Learning**

Plan periodic refreshers at regular intervals (e.g., annually or semi-annually). Rotate topics to include updates in safety practices, cultural safety insights, and new research methods.
- Provide Clear Guidelines**

Ensure all training materials, rules of conduct, and safety guidelines are easy to find, use plain language, and are available in multiple formats (e.g., print, digital, video).
- Integrate Safety Discussions Into Routine Practice**

Embed conversations about safety and cultural respect into regular team meetings, project kick-offs, and debriefs.
- Encourage Continuous Feedback**

Create accessible feedback channels that allow team members to raise safety concerns, suggest improvements, and share lived experiences without fear of judgment, dismissal, or negative consequences.
- Support Cultural Safety in Practice**

Promote land acknowledgments at meetings and events as a practice of respect and recognition. Invite Indigenous Knowledge Keepers or cultural safety facilitators, where appropriate, to support learning and reflection.
- Track and Monitor Training Impact**

Where possible, evaluate training effectiveness through surveys, reflections, and team discussions as needed. Use results to refine the content and delivery of safety and cultural safety training.



How To Make Meetings Accessible

General Meeting Tips

- Personalize Accommodations:** Ask attendees ahead of the meeting if they require accommodations.
- Prepare in Advance:** Provide meeting materials in advance, with sufficient time for attendees to prepare for participation (e.g., pre-reading).
- Use Clear Communication:** Introduce terms before using acronyms, and avoid jargon where possible.
- Provide Translation and Interpretation:** Offer live captioning, sign language interpretation, or translation into other languages when appropriate.

In-Person Meetings

- Select an Accessible Venue:** Ensure the venue is accessible to people with disabilities (e.g., wheelchair ramps, accessible bathrooms). Consider accessible parking, elevators, and seating, as well as clear signage with high-contrast text and Braille.
- Provide Assistive Listening Systems:** Offer devices that amplify sound for attendees with hearing impairments, ensuring clear communication during presentations.
- Plan for Emergencies:** Develop and communicate emergency procedures that consider the needs of attendees with disabilities, including accessible evacuation routes and assistance.
- Support Caregiving Needs:** Consider accommodations for childcare and caregivers accompanying participants.

Virtual Meetings

- Consider Time Zones:** Schedule meetings at times that accommodate multiple time zones, especially for international participants.
- Ensure Technology Accessibility:** Test technology (e.g., video conferencing tools) ahead of time and offer support for those unfamiliar with it. Select platforms that comply with accessibility standards, supporting screen readers and other assistive technologies.
- Make Content Accessible:** Use high-contrast visuals, provide captions for videos, and ensure all multimedia content is accessible to individuals with visual/hearing impairments.
- Design User-Friendly Registration:** Create registration forms that are easy to navigate and compatible with screen readers, allowing all participants to register without barriers.
- Provide Technical Support:** Offer pre-event and real-time technical assistance to help attendees navigate the virtual meeting environment.
- Gather Feedback:** Provide opportunities for attendees to share feedback on accessibility features and report any issues encountered.

Post-Meeting Follow-Up

- Share Clear Summaries:** Provide concise, easy-to-read notes using bullet points, plain language, and visual elements where possible.



How To Maintain Regular Communication

- Establish Communication Norms**
Set clear expectations for how and how often teams will communicate (e.g., weekly updates, biweekly meetings, newsletters, and/or ad hoc check-ins).
- Use Collaborative Tools**
Leverage tools like Slack, Microsoft Teams, shared email lists, or newsletters to support timely, transparent, and accessible communication.
- Support Engagement and Connection**
Incorporate light engagement strategies (e.g., brief icebreakers, check-ins, or informal conversation time) to build relationships and trust.
- Offer Flexible Options**
Provide multiple ways for people to engage (e.g., written, verbal, virtual, one-on-one), including options for confidential or private conversations.
- Enable Quick Exchanges**
Encourage the use of informal channels (e.g., Slack, Teams chat, WhatsApp) for quick questions, clarifications, and team connection where appropriate. Confirm whether team members are comfortable using personal accounts or prefer to use only organizational channels.
- Provide Scheduling Support**
Maintain a shared calendar to track meetings, deadlines, and key milestones, and share agendas and materials in advance.
- Promote Two-Way Communication**
Ensure communication flows in both directions by inviting questions, providing contact information (e.g., in newsletters), and creating space for participation during meetings.
- Gather Feedback on Communication**
Regularly seek feedback on communication approaches and adjust frequency, format, or tools based on what works best for the group.
- Communicate Accessibly**
Use plain language, clear formatting, and visual supports where possible, and ensure communication methods are accessible to team members with diverse needs.
- Right-Size Communication**
Be mindful of message volume and frequency to reduce information overload, especially during busy periods.
- Clarify Timelines**
Be clear on if you need a response or task completed by a certain time, allowing team members sufficient time to accommodate.



How To Facilitate Knowledge Sharing

- Create Regular Cross-Project Opportunities**
Schedule intentional, recurring opportunities for team members to share updates, lessons learned, and emerging challenges.
- Use a Centralized Platform**
Leverage a shared platform (e.g., Slack, SharePoint, newsletters, network repositories) to house research outputs, tools, templates, and best practices.
- Document and Curate Learning**
Ensure key learnings, findings, adaptations, and methods are documented, organized, and easy to locate—both during and after projects.
- Communicate Clearly and Accessibly**
Present information in ways that are appropriate for the intended audience, using plain language, visuals, and summaries where helpful.
- Identify Knowledge-Sharing Champions**
Clarify who is responsible for sharing what information, when, and in what format, to keep knowledge exchange consistent and on track.
- Leverage Communication Expertise**
Keep communications teams informed of milestones, publications, and events, and seek their support when appropriate. Consider external communications expertise for large or high-impact initiatives.
- Foster Trust and Safety**
Encourage open dialogue and frame challenges and mistakes as learning opportunities rather than failures.
- Focus on What Is Useful**
Be intentional about what is shared. Prioritize key messages, practical insights, and lessons learned—including what did not work—to avoid information overload.
- Measure and Adapt**
Track engagement and participation (e.g., attendance, downloads, contributions) and adjust knowledge-sharing approaches based on what is most effective.
- Value Multiple Forms of Knowledge**
Ensure patient partners' insights, lived experience, and reflections are intentionally included in cross-project learning.



How To Debrief and Gather Feedback Regularly

- Hold Timely Debriefs**
After key meetings, project milestones, or events, schedule a debrief or share meeting summaries with actionable items as soon as possible, while experiences are fresh.
- Summarize Key Takeaways Clearly**
Capture and share key insights using plain language, bullet points, and visual summaries where helpful.
- Identify Clear Next Steps**
Translate feedback into action by outlining next steps, assigning responsibility, and setting realistic timelines.
- Use Multiple Feedback Methods**
Offer diverse ways for people to share feedback (e.g., anonymous surveys, written forms, one-on-one conversations, group discussions).
- Ask the Right Types of Questions**
Use closed-ended questions when quick, comparable input is needed, and open-ended questions when deeper reflection, nuance, or context is important.
- Create Safe and Respectful Spaces**
Foster an environment where individuals feel comfortable sharing honest feedback without fear of judgment, dismissal, or negative consequences.
- Confirm Understanding**
When feedback is shared verbally or interactively, reflect back what you hear to confirm understanding and demonstrate active listening.
- Close the Feedback Loop**
Communicate how feedback has been used, what changes were made, or why certain suggestions could not be acted upon.
- Frame Feedback as Learning**
Position feedback and debriefing as opportunities for learning and improvement, not evaluation or performance judgment.
- Make Feedback Accessible**
Ensure feedback and debrief formats are accessible (plain language, flexible timing, multiple formats) and inclusive of patient partners and diverse contributors.



How To Strengthen Patient Partnership in Research

- Identify Patient Partners**
Identify and engage individuals who can represent patient voices, ensuring diverse representation.
- Define Roles**
Clearly define the roles and expectations for patient partners.
- Provide Support**
Offer mentorship, guidance, training, and regular check-ins for patient partners.
- Facilitate Understanding**
When needed, glossaries and other informational materials that convey complex medical and research concepts in plain language should be provided.
- Create Safe Spaces**
Build an environment where patient partners feel comfortable sharing opinions and experiences. Demonstrate humility and willingness to acknowledge biases.
- Involve Patient Partners**
Ensure individuals are included in planning meetings and decision-making processes when relevant.
- Ensure Flexibility**
Offer alternative ways to gather feedback if patient partners cannot attend a scheduled meeting or would like to provide feedback privately.
- Share Outcomes**
Ensure patient partners are involved in reviewing and sharing research outcomes.
- Gather Feedback**
Set up regular feedback sessions where patient partners can discuss their experiences and share insights.
- Recognize Contributions**
Acknowledge patient partners' impact through appropriate credit, appreciation, and fair compensation.



How To Build and Strengthen External Partnerships

- Engage in Networking Opportunities**
Participate in conferences, webinars, forums, and community events to build relationships and increase awareness of your work.
- Identify Strategic Partners**
Identify organizations, networks, communities, or research groups with shared goals, complementary strengths, aligned values, or overlapping audiences.
- Initiate Contact Thoughtfully**
Reach out to potential collaborators with a clear description of mutual interests, potential benefits, and opportunities for collaboration.
- Clarify Shared Goals**
Ensure all partners clearly articulate their objectives, expectations, and desired outcomes at the outset of the relationship.
- Recognize and Leverage Strengths**
Identify each partner's strengths, expertise, and capacity, and align roles accordingly to maximize collective impact.
- Define Roles and Responsibilities**
Clearly outline who is responsible for what, including decision-making authority, timelines, and communication expectations.
- Maintain and Assess the Relationship**
Regularly reflect on how the partnership is functioning by considering indicators such as engagement, responsiveness, trust, and progress toward shared goals.
- Seek External Funding Opportunities**
Explore and pursue funding opportunities that expand your project's reach and support partnership development, sustainability, and shared impact.
- Leverage Communications and Networks**
Work with internal communications teams to amplify joint initiatives and share outcomes broadly. Use existing networks to extend reach.
- Practice Reciprocity and Respect**
Approach partnerships with humility, respect, and a commitment to reciprocity—recognizing power dynamics, histories, and different ways of working.
- Pilot the Partnership**
Begin with small, time-limited collaborations (e.g., joint events, co-authored outputs) to build trust before expanding scope.
- Assess Capacity and Readiness**
Be realistic about available time, resources, and competing priorities before entering new partnerships or projects.
- Share Outcomes and Credit**
Communicate partnership outcomes clearly and acknowledge all contributors appropriately in presentations, publications, and communications.