

Embedding Equity Considerations in Literature Review



KANSAS HEALTH INSTITUTE

Informing Policy. Improving Health.

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 Literature Review

Definition of Literature Review

A literature review is a comprehensive examination of scholarly sources (such as books, journal articles and theses) related to a specific topic or research question.

It is designed to provide an overview of current knowledge, including substantive findings as well as theoretical and methodological contributions, on a particular topic. This process involves collecting information from a range of sources, evaluating it critically and presenting it in a well-structured manner to understand the landscape of the area of study.



Why Embed Equity in Literature Review

Incorporating equity in literature review is crucial for ensuring inclusivity, reducing biases and enhancing the ethical and scientific integrity of research. Equitable practices encompass expanding beyond traditional scholarly resources like books, journal articles and theses to incorporate materials such as reports from nonprofit or community-based organizations, publications from governmental entities and more. By embracing diverse perspectives through such inclusive reviews, researchers can confront historical and structural inequities, enhancing the credibility and applicability of their findings. This approach fosters equitable policies and interventions, ensuring that the voices of community members are considered, and bolsters the importance and relevance of the research across diverse demographic groups.

A set of general and specific principles important for embedding equity in literature review follows. Note that the strategies suggested 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.

LITERATURE REVIEW	
4. Strategies for Developing Inclusive Conceptual Frameworks	
	4.1. Begin by identifying the conceptual frameworks employed related to your topic. Consider whether these frameworks adequately address and incorporate current equity practices. Clearly identify what aspects of equity are relevant to your topic. A conceptual framework is a structure that guides research by providing a clear understanding of the concepts, theories and relationships relevant to a particular topic.
	4.2. Develop research questions that help in selecting or developing a conceptual framework that aligns with the equity goals of the review. These questions should focus on identifying gaps in the existing frameworks and exploring new perspectives that enhance inclusivity.
	4.3. Based on the gaps identified and the research questions formulated, either select a suitable existing framework or adapt one to better meet contemporary equity standards. If necessary, develop a new framework that explicitly incorporates equity considerations.
	4.4. Apply the chosen or adapted framework consistently across your literature review. Use it as a lens for analyzing the data, ensuring that equity considerations are central to your analysis.
	4.5. Engage peers or experts in the equity field to review the chosen frameworks and the application thereof in your analysis.
	4.6. Document the choice or development of the conceptual framework in your literature review. Provide a clear justification for its selection, highlighting how it addresses both the topic at hand and integrates equity principles effectively.
	4.7 Partner with academic institutions and other organizations to allow researchers full access to databases.
5. Strategies for Developing Inclusive Research Questions	
	5.1 Familiarize yourself with the literature in your area of interest to identify what has been studied, gaps in the literature and potential biases or limitations.
	5.2 Build relationships with community members by listening and setting aside your own agenda. Focus on listening to the community’s priorities and needs before engaging stakeholders in your work. Identify if there is alignment rather than expecting the community to align with your priorities. This approach helps prevent tokenism, where connections are made only when “we need them.” Over time, reassess to confirm continued alignment.
	5.3 Engage community members and stakeholders from diverse backgrounds in informing the development of questions to be addressed through literature review. This approach ensures the inclusion of concerns from various groups, particularly those often underrepresented and historically excluded. Share with the stakeholders how this information informed your work. When finalizing questions:
	5.3.a. Determine the number of questions to focus on, considering resources, timing, the opportunity to make an impact and which questions most align with the community members’ stated priorities and needs.
	5.3.b. Ensure that the research questions are centered on understanding the impact of the issues on the social determinants of health and populations who have been historically excluded.

5. Strategies for Developing Inclusive Research Questions (continued)

	5.3.c. Recognize, define and address biases:
	5.3.c.1. Acknowledge biases in theoretical frameworks by engaging in discussions with a diverse group, including meetings or listening sessions with community stakeholders, and seeking frameworks created by researchers to respond to the need for more equity in research suitable for your research question and setting. For example, one option is to consider frameworks created by researchers in non-Western cultures or by Black, Latino and female researchers. Examine how your research frameworks could potentially reinforce existing power dynamics and marginalization and adjust accordingly.
	5.3.c.2. Acknowledge that the biases in research are often shaped by those allowed to pose questions and undertake the work and use inclusive wording or terms in the questions. Recognize the historical contexts, assumptions and dominant cultural narratives that the questions may reinforce or challenge. Priority questions for the community members involved may differ from the research questions most of interest to the research team. Ensuring diverse inclusion and preventing repetitive exclusions can mitigate the recurrence of the same biases. Additionally, consider the impact of funding sources on which questions are asked, by whom and the partnerships that are created as a result. With this information, work to modify the questions to limit the potential impact of these biases.
	5.3.c.3 Conduct a systematic review to ensure a comprehensive, unbiased and transparent synthesis of existing research.
	5.3.d. Consult with communities on how to best to incorporate asset-based framing for questions, as appropriate for the community’s context and need. Asset-based framing focuses on recognizing and identifying community strengths and resources instead of leading with gaps and challenges (deficit-based framing).
	5.3.e. Recognize the value of addressing a small number of questions thoroughly as opposed to taking on numerous questions and diluting resources.
	5.3.f. Before beginning the study, analyze the questions developed through an equity lens and the historical context of the community with whom you are researching.

LITERATURE REVIEW

6. Strategies for Determining Inclusive Search Terms

- | | |
|--|---|
| | 6.1. Use terms that are inclusive and reflect the diversity of populations involved in your topic. This might mean using specific demographic identifiers, such as “African American,” “LGBTQ+,” “low-income,” “rural communities,” etc. Engage community members to ensure appropriate terms are used. |
| | 6.2. Include synonyms and related terms that capture a wide range of how equity-related issues might be discussed in the literature. For example, terms like “health disparities,” “health inequities” and “access to health care” might all be relevant. |
| | 6.3. Conduct initial searches to see what kind of results your equity-centered terms yield. Be prepared to refine and expand your terms based on the breadth and depth of the literature you find. |
| | 6.4. Be transparent about the literature review process. Keep detailed records of the search terms used, databases searched and the rationale for choosing specific terms, especially those related to equity. |

7. Strategies for Setting Inclusive Inclusion and Exclusion Criteria

- | | |
|--|---|
| | 7.1. Consider multiple research designs and methodologies, such as qualitative studies, mixed-methods research and community-based participatory research. |
| | 7.2. Be cautious about quality thresholds that might disproportionately exclude studies from lower-resource settings or non-traditional research environments. |
| | 7.3. Conduct a pilot test of your inclusion and exclusion criteria on a small set of articles to see how they work in practice. Adjust as necessary based on whether relevant research is being appropriately included or excluded. |
| | 7.4. Document decisions and rationale for the inclusion and exclusion criteria, providing transparency and allowing for adjustments if biases are identified later in the review process. |

8. Strategies for Identifying Databases and Other Sources

- | | |
|--|---|
| | 8.1. Actively seek out literature from a wide range of sources. Utilize insights from various disciplines to gain a multifaceted understanding of the topics, acknowledging different perspectives. |
| | 8.2. Consider the diversity policies of the journals and publishers from which you are sourcing articles. Some may have specific initiatives or track records for promoting works by a diverse range of authors. |
| | 8.3. Actively seek out works by authors from underrepresented groups. |
| | 8.4. Beyond academic journals, consider sources like books, conference papers, government reports and publications from nonprofit organizations. |
| | 8.5. Identify and include unpublished work in your literature review to mitigate publication bias. Researchers should solicit unpublished studies from the scientific community and community partners to ensure a more comprehensive review. Be transparent about your approach. |
| | 8.6. Engage with scholars or practitioners who focus on equity and diversity to identify studies and authors who might be overlooked otherwise. |

LITERATURE REVIEW

9. Strategies for Developing Inclusive Evidence Tables

An evidence table is a structured way to organize and summarize the findings from various studies on a specific topic. It helps in comparing and synthesizing the results across different studies, thereby providing a clear overview of the evidence available. To center equity considerations in the evidence table, include a description of how equity considerations were centered in the methodology and community engagement, among other aspects. To address the length of the table, create sub-tables that focus on specific aspects. For example, one table could focus on study characteristics and another on outcomes or equity considerations. Suggestions for items to include in the evidence table are presented below:

	9.1. Number (Sequential Number): For easy reference.
	9.2. Title: The study/report title.
	9.3. Author(s): The authors' names.
	9.4. Publication Year: Year of publication.
	9.5. Source/Journal: Where it was published or which organization published it.
	9.6. Study Design: Type of study (e.g., randomized controlled trial, cohort study).
	9.7. Population Studied: Focus group of the study (e.g., veterans, pregnant women).
	9.8. Geographic Area: Study location, noting geographic variations.
	9.9. Key Findings: Brief summary of critical findings, including demographic factors (age, gender, race, ethnicity, socioeconomic status), geographic variations, health care access, social determinants of health, etc.
	9.10. Equity Focus: Specific focus on how the study addresses equity issues. This can include the representation of underrepresented groups, analysis of disparities or focus on equity-driven outcomes.
	9.11. Methodological Approach to Equity: How the study incorporates equity in its methodology. For example, does it use inclusive sampling strategies or analysis methods that highlight disparities?
	9.12. Community Engagement: Information on whether and how the study involved community members, especially from marginalized groups, in the research process.
	9.13. Cultural Context: Understanding of the cultural context within which the study was conducted, especially if it impacts the interpretation of results. Acknowledge the complexity of cultural-specific factors influencing individuals' experiences in a neutral, non-generalizing way.
	9.14. Limitations Regarding Equity: Any limitations the study has in addressing or representing equity issues.
	9.15. Implications for Policy and Practice: Insights on how the findings can inform equitable policies and practices.
	9.16. Recommendations for Future Research: Suggestions for further research, particularly in areas that address gaps in equity.
	9.17. Funding Source: Include information about the funding source for articles and any relevant information about the funder.

LITERATURE REVIEW

10. Strategies from Analyzing Information Included in the Evidence Table and Developing Summaries

	10.1. Review the literature to ensure that study samples are inclusive of diverse populations. This includes checking for the representation of different demographics such as race, gender, socioeconomic status and geography in the studies. Highlight any gaps in representation and discuss their potential impact on the applicability of the findings.
	10.2. When synthesizing findings, prioritize studies that address equity issues or those conducted in underrepresented communities. Focus on insights that reveal systemic inequities or interventions that effectively reduce disparities.
	10.3. Engage with stakeholders from diverse backgrounds during the review process.
	10.4. Based on feedback, make iterative revisions to the summaries. This step ensures that the final product authentically represents the findings and maintains an equity-focused lens.
	10.5. Clearly report the demographic characteristics and socioeconomic contexts of the populations studied in the literature. This transparency helps readers understand the applicability of the findings to different groups and can guide future research to address any underserved or underrepresented populations.
	10.6. Document the analysis process, including how decisions were made about key findings and recommendations. Transparency in the process (e.g., including positionality of the research team) can aid in accountability and provide a roadmap for addressing biases.

11. Strategies for Developing Inclusive Recommendations

	11.1. Focus on developing clear, actionable recommendations that stakeholders can realistically implement. These should aim to address the issues and opportunities identified through the research. Work closely with technical experts to ensure that the information and insights from individuals with lived experiences are given due weight and are integrated into the findings in a meaningful way.
	11.2. Be open to adapting the analysis and presentation style based on the nature of the data and the preferences of the community being engaged. This flexible approach can lead to more meaningful and impactful findings.

REFLECTION QUESTIONS:

1. Does the literature adequately represent diverse populations, especially those who are underrepresented or marginalized in research? How can the review be adjusted to include a broader spectrum of perspectives?
2. How do the studies reviewed address systemic inequities? Are equity issues central to research questions and methodologies, or are they peripheral?
3. What biases (institutional, researcher, publication) might be influencing the studies included in the review? How can these biases be identified and mitigated in your synthesis and conclusions?
4. How do historical contexts and power dynamics shape the issues being researched? Are these factors considered in the studies you are reviewing?
5. How could the findings from this literature review influence policy and practice?

RESOURCES:

- Centers for Disease Control and Prevention. (2023). *What is Health Equity?* Retrieved from <https://www.cdc.gov/healthequity/index.html>
- Fallon, L., Grapin, S., Noltemeyer, A., et al. (2022). Promoting equity and social justice in the peer review process: *Tips for Reviewers*. Volume 43(1). Retrieved from <https://doi.org/10.1177/01430343211070165>
- 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>
- Kelly, C., Kasperavicius, D., Duncan, D., Etherington, C., Giangregorio, L., Pesseau, J., et al. (2021). 'Doing' or 'using' intersectionality? Opportunities and challenges in incorporating intersectionality into knowledge translation theory and practice. *International Journal of Equity in Health*, 20(1), Article 187. Retrieved from <https://doi.org/10.1186/s12939-021-01509-z>
- Office of Minority Health. (n.d.). *National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care*. U.S. Department of Health & Human Services. Retrieved from <https://thinkculturalhealth.hhs.gov/clas>
- Regulations.gov. (n.d.). *Accessibility*. Retrieved from <https://www.regulations.gov/accessibility>
- Ueffing, E., Tugwell, P., Welch, V., Petticrew, M., & Kristjansson, E. (2012). *Equity Checklist for Systematic Review Authors, Version 2012-10-04*. London: Campbell and Cochrane Equity Methods Group. Retrieved from <https://methods.cochrane.org/sites/methods.cochrane.org/equity/files/uploads/EquityChecklist2012.pdf>
- Venkateswaran, N. M., Feldman, J. E., Anderson, S. H., Lewis, M. A., Armstrong-Brown, J. M., Comfort, M. L., Lowe, A. N., & Pineda, D. (2023). *Bringing an Equity-Centered Framework to Research: Transforming the Researcher, Research Content, and Practice of Research*. RTI Press. Retrieved from <https://doi.org/10.3768/rtipress.2023.op.0085.2301>
- Welch, V. A., Petkovic, J., Jull, J., Hartling, L., Klassen, T., Kristjansson, E., et al. (2019). Equity and specific populations. In *Cochrane Handbook for Systematic Reviews of Interventions* (pp. 433-449). Hoboken, NJ: Wiley Online Books.