



Checklists to  
help implement  
improvements in  
training for reviewers  
and evaluators

These checklists are intended to help as you plan how to improve diversity, inclusion, and equality in pre-award funding processes through improvements in training for reviewers and evaluators. The first checklist is a high-level list of general actions and questions to consider within your organisation before you start planning any specific interventions. The second checklist provides a more focused set of questions that can be used to inform your plan to improve your training for reviewers and evaluators. Neither list is intended to be either exhaustive or prescriptive; rather, they are meant to provide a useful starting point for discussions within your organisation, in order to give your planned intervention the best chance of success.

# 1. General actions and questions

Remember that changing your application processes to reduce the likelihood of bias in outcomes is a long-term objective. Culture change can only occur if it happens at a pace at which you can bring your community with you, so planning for and managing this change carefully is absolutely essential. Engaging with your stakeholders – applicants, reviewers and evaluators, staff, and others – throughout the change process is critical to success. This will enable you to understand and take into account any real or imagined barriers to making progress, while an iterative approach, with check-in points, and opportunities to adapt to changing circumstances or new evidence, will help you build trust and achieve the desired outcomes. It is equally important to evaluate the changes being made: understanding where your organisation is starting from, where you want to get to, and how and when to measure your progress – including making adjustments, as needed.

We recommend that you consider the following questions and actions before starting to plan any specific interventions within your organisation.

Clarify the challenge; what exactly are you trying to solve?

How will solving this challenge improve the workings, mission, or culture of your organisation? Identify an internal stakeholder or team to be responsible and accountable, and to drive the project. A champion at the leadership level will be especially helpful

Is the challenge specific to your organisation, or is it part of a wider problem within your sector? If the latter, consider communicating with another organisation or a group to gain a sense of where the general thinking is and increase the likelihood of success/acceptance within your sector.

Benchmark the current situation (collect data, conduct surveys or focus groups)

What internal resources are available? (e.g. people, technology, financial)

Are any other internal resources available? For example, are there existing initiatives or groups within your organisation that you could engage with to expedite the initiative?

What external resources are available? For example, toolkits on the [DORA](#) or Research on Research Institute (RoRI), or other websites, examples of other organisations working in this area, who could be approached for advice?

What intervention options are available and feasible? Examples could include introducing an inclusion component in proposals, extending deadlines to increase participation from carers, auditing your data collection workflows for redundancy that can be removed, updating training, etc.

Decide how to measure the impact of intervention(s) – would quantitative, qualitative, or both methods work best?

Are there any potential downsides to implementing changes?

Decide how to follow through the process, including checking workflows

Is additional training required – for applicants and/or other stakeholders (e.g. reviewers)? What form should this take – online, in-person, via interactive sessions or asynchronously?

Do you have examples of best practices and case studies?

Will other changes be needed, e.g. to deadlines, to grant applications or other systems, to templates?

What follow up actions will be needed, and what is the time frame for review?

How will you address any issues that arise?

What opportunities will there be for users to provide feedback outside of the consultation processes? (e.g. feedback forms on websites, regular surveys, etc.)

Develop a strong communications plan, which includes listening as well as disseminating

## 2. Checklist: Improvements in training for reviewers and evaluators

Once you've worked through the general actions and questions above, you're ready to consider the questions in the checklist below, which are specifically related to your planned intervention.

Does your current training specifically address EDI issues, e.g., unconscious bias, use of appropriate language, etc?

Who is responsible for training your reviewers and evaluators (staff, peer-to-peer, external partners, etc.)?

Do you have the appropriate level of expertise internally to deliver training to ensure that your review/evaluation process is diverse, inclusive, equitable, and accessible? If not, do you know other funding organisations or external partners that could help?

Is training required for all reviewers and evaluators? Does it include refresher training and, if so, is this required or not?

How is your training delivered, e.g., in person, online, both?

How flexible are or could you be in terms of delivering this training, e.g., could reviewers and evaluators opt to be trained in small, bite-sized chunks over a period of time?

How do you communicate to your reviewers and evaluators about changes to the training? Are people who have already been trained encouraged or required to take the training again if there are significant changes?

How, and how often, do you formally evaluate your overall training for reviewers and evaluators?

How, and how often, do you evaluate your reviewers and evaluators?

Do your evaluations specifically address EDI issues? If so, what have you learned?

Is there a process for trainers and for reviewers/evaluators to provide you with feedback?

How do you recognise your reviewers and evaluators? Are there opportunities to recognise those who demonstrate good practice around EDI in their reviews?

How, and how often, will you evaluate the impact and effectiveness of the changes you make to your training?

Do you have a process in place to continually reflect on and improve the changes if needed?

How and when will you communicate to your wider community the changes that you make, to those both within and external to your organisation?

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