



USAID
FROM THE AMERICAN PEOPLE

GUIDANCE FOR PROMOTING DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY IN EDUCATIONAL MATERIALS

INTRODUCTION

USAID promotes the rights and inclusion of marginalized and underrepresented populations in the development process and leads the U.S. Government's response to addressing the needs of children in adversity and youth. Inclusive development is the concept that every person, regardless of their identity, is instrumental in transforming their society and their inclusion throughout the development process leads to better outcomes.

Equity and inclusion are key principles of USAID's [Education Policy](#). USAID believes that education systems must benefit all learners. Incorporating diverse knowledge and perspectives in the design, revision, and selection process for educational materials leads to more inclusive and better-quality education for all. USAID understands that extending services to reach the most marginalized often requires additional resources and specialized expertise, especially in crisis and conflict contexts.

The *Guidance for Promoting Diversity, Equity, Inclusion, and Accessibility in Educational Materials* equips development workers to identify and create educational materials that promote equity and inclusion across the education continuum, from pre-primary through higher education, and within the populations they seek to serve.

What is promotion of equity and inclusion in educational materials, and why is it important?

Responsible and effective promotion of equity and inclusion in educational materials means:

- Understanding the context in which the materials will be received, particularly demographic composition and intergroup relations;
- Understanding the interactions between interventions within a given context and how such interactions are affected by group relations; and
- Acting upon the understanding of these interactions to minimize negative impacts and maximize positive impacts of educational materials, to empower marginalized groups.

Educational materials that do not promote equity and inclusion can worsen marginalization. For example, if children or youth from one group have less access to requisite technology for distance learning materials, or if materials use derogatory slang terms to describe a marginalized group, those materials will reinforce systemic exclusion.

Key Definitions

Diversity. Presence of people of different backgrounds, abilities, and identities in a group ([2020 GEM Report](#)).

Educational Materials. Any information or content that is used to support the process of imparting or gaining particular knowledge or skill (e.g., curricular or training materials or supplementary learning resources). The content may be delivered through any modality, including text, images, audio, video, etc.

Equality. A state of affairs or result whereby all members of a group enjoy the same inputs, outputs, or outcomes in terms of status, rights, and responsibilities (2020 GEM Report).

Equity. A process or actions aimed at ensuring equality (2020 GEM Report).

Ethnic Minority. A group of people of a particular ethnicity, race, or nationality living in a country or area where most people are from a different ethnicity, race, or nationality. Ethnic minorities may be subject to stigma and discrimination ([USAID Education Policy](#)).

Inclusion. A process consisting of actions and practices that embrace diversity and build a sense of belonging, rooted in the belief that every person has value and potential and should be respected (2020 GEM Report).

Inclusive Education. An education that promotes mutual respect and value for all persons and builds educational environments in which the approach to learning, the institutional culture, and the curriculum reflect the value of diversity (2020 GEM Report).

Marginalized Group. A group within any given culture, context, or history that is at risk of being excluded and discriminated against because of the interplay of differing personal characteristics or grounds (2020 GEM Report).

Specific groups who fall within this definition vary by context. Individuals and groups may be marginalized because of their: disability; sex; sexual orientation, gender identity and expression, and sex characteristics (SOGIESC, which includes LGBTQI+ people); ethnic minority, racial, indigenous, language, or religious group; socioeconomic status or caste; residency in a rural or high-density area (e.g., poor access to basic needs and resources); residency in a crisis or conflict area (e.g., child affected by war, internally and externally displaced learners); health status (e.g., people living with HIV or terminal diseases); age (e.g., overaged students); and/or lack of social, economic, and/or political protections (e.g., child laborers, victims of trafficking, youth unwillingly married, migrant workers, people of diverse political opinions).

Marginalized populations can represent intersectional identities and be marginalized in multiple ways. These groups often experience discrimination in the application of laws and policy and/or access to resources, services, and social protection, and may be subject to harassment, violence, and/or persecution.

Disability. Includes but is not limited to persons with physical, mental, intellectual, or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others. Major categories include developmental, sensory, physical, and psychosocial.

Identity. A set of attributes that uniquely describes an individual or entity.

LGBTQI+ (Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex). This acronym is commonly used to refer to gender and sexual minorities. Variations exist that add, omit, or reorder letters (i.e., LGBT, LGB, GLBT, LGBTIQA—in which Q typically stands for “queer” or “questioning” and A typically stands for “ally” or “asexual”). Other related acronyms include MSM (men who have sex with men), and SOGIESC (sexual orientation, gender identity/expression, sex characteristics).

Lesbian: A woman who is emotionally, romantically, and/or sexually attracted to other women.

Gay: Emotional, romantic, and/or sexual attraction to the same gender. The term “gay” is used most often for homosexual men, though sometimes is used to refer to lesbians and bisexuals.

Bisexual: Emotional, romantic, and/or sexual attraction to men and women.

Transgender: An umbrella term that refers to an individual whose gender identity is different from their sex assigned at birth.

Intersex: An umbrella term that refers to a variety of chromosomal, hormonal, and anatomical conditions in which a person does not seem to fit the typical definitions of female or male (USAID Education Policy).

Religious Minorities. People who belong to or practice a religion held by a minority of the population of a country, state, or region. Religious minorities may be subject to stigma, discrimination, and prejudice, especially when the religious differences correlate with ethnic differences (USAID Education Policy).

Who is the Guidance for?

The Guidance is primarily intended for use by USAID Missions and Operating Units, to foster dialogue among relevant stakeholders¹ and provide direction during the process of identifying, revising, or creating materials for teaching and learning in education systems. However, it can be applied broadly to educational materials across sectors and in a range of resource contexts.

What is the Guidance for?

This Guidance is applicable to fiction and non-fiction educational materials across all modalities of delivery, including print, audio and radio, video and television, mobile phone, and online/digital. It is applicable across the learning continuum, pre-primary through higher education, and training programs.

This Guidance may be applied to a stand-alone educational material, or to a collection of educational materials taken as a whole (e.g., one singular radio segment, or a radio mini-series that comprises multiple segments).

How is the Guidance structured?

This Guidance has four sections: Design Team, Technology/Connectivity, Content, and Reflection and Growth. Each section includes at least one guiding question to facilitate individual reflection and/or group discussion. When the answer to all of the guiding questions is “yes,” the educational materials can be considered *exemplary* in terms of promoting diversity, equity, inclusion, and accessibility.

Section	Definition	Guiding Question(s)
I. Design Team	Direct contributors and supervisors who are creating/have created the educational material.	Is the design team committed to and equipped with the knowledge and skills to create materials that reflect the needs of marginalized populations?
II. Technology and Connectivity	Resources such as hardware/software/Internet required for use of the educational material.	If the material requires technology and/or connectivity (Internet), do all groups, including learners with disabilities, have equal access to the resources required?
III. Content	Subjects/characters/guests, images, dialogue/narration, and design and structural elements present in the educational material.	Does the content feature marginalized populations in an inclusive, conflict-sensitive manner, with at least proportional frequency of representation, and in a way that contributes to a culture of belonging?
IV. Reflection and Growth	Process by which learners expand their awareness and appreciation of diversity, equity, and inclusion issues within a given context.	Are there learning opportunities that provide multiple perspectives present in a context in a balanced, positive manner?

¹ Relevant stakeholders may include: 1) Key decision-makers involved in making decisions around the design, revision, selection, and/or application of educational materials (e.g., Ministry of Education officials, implementing partners, donors); 2) Specialists working in equity and inclusion, including organizations led by and for different marginalized populations; and 3) Other partners, such as social service providers and community leaders.

To inform answers to the guiding questions, each section of the Guidance includes enumerated criteria (optional). Each criterion has its own line with a definition/explanation, scoring scale, and notes column. Figure 1 provides an example.

Figure 1. Example of the Guidance structure for criterion I.A.

Guiding Question: Is the design team committed to and equipped with the knowledge, skills, and resources to create materials that reflect the needs of marginalized populations? A design team can be considered exemplary, in terms of promoting equality and inclusion, if it fully meets the following criteria.					
Criteria The design team is...	Target	Not Met	Partially Met	Fully Met	Notes
A. Proportionally representative of marginalized populations within the context of intended use.	At least 15% of design team members are persons with disabilities, at least 50% are women, at least 3% identify as LGBTQI+, and minority language groups, ethnic groups, religious groups, etc., are proportionally represented. If, despite intentional recruitment efforts, the core team cannot be proportionally representative of marginalized populations, external stakeholders representing marginalized populations are consulted for input and review.	0	1	2	

When is the Guidance used?

Design:

- When assembling the materials design team, reference Section I of the Guidance. If the design team has already been assembled, reference Section I to engage the design team in collective self-assessment of commitment, knowledge, skills, and attitudes pertaining to the promotion of equity and inclusion.
- Before creating materials, familiarize all members of the design team with the targets and criteria in the Guidance.
- Throughout the design process, refer to the Guidance to remind team members of the parameters of exemplary materials.

Revision: When using existing educational materials, apply the Guidance to identify gaps and guide revisions for improvement.

Selection: When using existing educational materials, apply the Guidance to compare options to identify the *most*² equitable and *most* inclusive educational materials for use in a particular context.³

² The vast majority of available materials will fall short of fully meeting *all* criteria.

³ Please keep track of the most equitable and inclusive material for future sharing purposes.

How is the Guidance used?

1. Research the context → 2. Tailor the Guidance to the context and modality → 3. Fill out the Guidance → 4. Reach consensus → 5. Score → 6. Take action

Step 1: Research the context.

Analyze relevant social, political, and historical factors to inform the creation of educational materials that promote equity and inclusion across the education continuum. Conduct formal discussions of your contextual analysis with key stakeholders to ensure that the intended beneficiaries are correctly identified, and that your plans are designed accordingly.

Find data about which modalities will most effectively reach the intended beneficiaries. Access to requisite technology and connectivity vary greatly between and within contexts. Choose a modality that is accessible to the most marginalized learners within the intended user population.

Step 2: Tailor the Guidance to the context and modality.

[Download the Guidance as an Excel Spreadsheet.](#)

Delete or adapt criteria to tailor the Guidance to the linguistic, political, cultural, or practical context. For example, in Swahili, pronouns are not gendered, so reviewers of Swahili material should delete criteria III.C.3.: *When referring to an unnamed subject/character/guest, if using gendered pronouns, at least 50% of pronouns used are feminine....*

Include additional criteria that arise as relevant to the context in the designated “Other” space provided at the end of each section. Save the newly tailored version of the Guidance. All relevant criteria should be referenced during formative and final assessments of the materials.

If applying the Guidance to material presented in a modality other than print, use these pre-adapted versions for material delivered by Audio/Radio, TV/Video, Online/Digital and Mobile Phone, as appropriate. The Excel Spreadsheet contains a tab for each modality.

Step 3: Fill out the Guidance.⁴ Individual reviewers consider the educational material against each line of criteria, highlight or circle the number in the corresponding box and write a short justification of analysis in the “Notes” column. If the criterion is not met at all (score of 0) or only partially met (score of 1), include a note about who is/will be marginalized by this material.

Step 4: Reach consensus. After filling out the Guidance, individual reviewers meet in small groups and/or one whole group to discuss their rationales for their scores on each line of criteria and address any disagreements.

Step 5: Score. After consensus is achieved, add the scores in the spaces provided. The total number of points possible in each section is provided for reference. However, if a section has been modified (if reviewers have adapted the Guidance by adding or deleting specific criteria), the total number of points possible will need to be adjusted.

Step 6: Take action. If designing new materials or revising existing materials, identify the most pressing gaps and formulate a plan to advance the materials closer to exemplary in terms of promoting diversity, equity, inclusion, and accessibility.

If selecting educational material from existing options, use the option with the highest score. Keep track of high-scoring material for future use and sharing purposes.

⁴ If assessing a collection of educational material, a separate Guidance form can be used for each stand-alone component, or one Guidance form can be used for the collection as a whole.

Figure 2. Example of a completed rubric for criterion I.A.

Guiding Question: Is the design team committed to and equipped with the knowledge, skills, and resources to create materials that reflect the needs of marginalized populations?

A design team can be considered *exemplary*, in terms of promoting equality and inclusion, if it fully meets the following criteria.

Criteria The design team is...	Target	Not Met	Partially Met	Fully Met	Notes
A. Proportionally representative of marginalized populations within the context of intended use.	<p>At least 15% 30% of design team members are persons with disabilities, at least 50% are women, at least 3% identify as LGBTQI+, and minority language groups, ethnic groups, religious groups, etc., are proportionally represented.</p> <p>If, despite intentional recruitment efforts, the core team cannot be proportionally representative of marginalized populations, external stakeholders representing marginalized populations are consulted for input and review.</p>	0	1	2	<p><i>Our data show that approx 30% of people in our context have a disability, so we adapted this criterion accordingly.</i></p> <p><i>Our design team has 5 members. Of our 5 members:</i></p> <p><i>2 (40%) have a disability.</i></p> <p><i>3 (60%) are women.</i></p> <p><i>1 (20%) identifies as LGBTI.</i></p> <p><i>4 (80%) are from minority language groups.</i></p> <p><i>1 (20%) is from a minority ethnic group.</i></p> <p><i>3 (60%) are from minority religious groups.</i></p>

What important points should be considered throughout the process?

Respect the context-specific legal and/or social limitations for promoting certain aspects of this work.

Promotion of equity and inclusion can be controversial. Material is more likely to be well-received and used if it reflects broad dialogue and buy-in from a wide range of stakeholders.

It is important to recognize the diverse experiences and views of all material creators and stakeholders. Ensure that communication and collaboration are led by a skilled facilitator who is familiar with the specific sensitivities of the context where this work is taking place.

ADDITIONAL RESOURCES

- [USAID Education Policy \(2018\)](#)
- [USAID Higher Education Program Framework \(2021\)](#)
- [USAID ADS 201 Suggested Approaches for Integrating Inclusive Development Across the Program Cycle and in Mission Operations \(2018\)](#)
- [U.S. National Strategy on Gender Equity and Equality \(2021\)](#)
- [USAID's Integrating LGBTQI+ Considerations Into Education Programming \(2021\)](#)
- [Returning to Learning during Crises Toolkit \(Tool 1.1 and 1.2\)](#)
- [ECCN's Conflict Sensitive Education Indicators \(CSE-10, CSE-11, CSE-12, CSE-15, CSE-23, CSE-24, CSE-40\) \(2019\)](#)
- [USAID's Checklist for Conflict Sensitivity in Education Programs \(2013\)](#)
- [UNICEF's ABCs of Digital Accessibility](#)
- [Universal Design for Learning Framework](#)
- [USAID Universal Design for Learning to Help All Children Read \(2019\)](#)
- [Using ICT to Implement UDL \(2020\)](#)
- [USAID Disability Policy Paper \(1997\)](#)
- [USAID Disability Communication Tips \(2016\)](#)
- [USAID Advancing LGBTQI + Inclusive Development](#)
- [USAID Policy on Promoting the Rights of Indigenous Peoples \(2020\)](#)
- [USAID-INEE Checklist for ICT Interventions to Support Education in Crises and Conflict Settings \(2018\)](#)
- [USAID Toolkit for Designing a Comprehensive Distance Learning Strategy \(2021\)](#)
- [USAID's A Roadmap for Measuring Distance Learning \(2021\)](#)
- [Principles on Identification for Sustainable Development: Toward the Digital Age](#)
- [Identity In A Digital Age: Infrastructure for Inclusive Development](#)