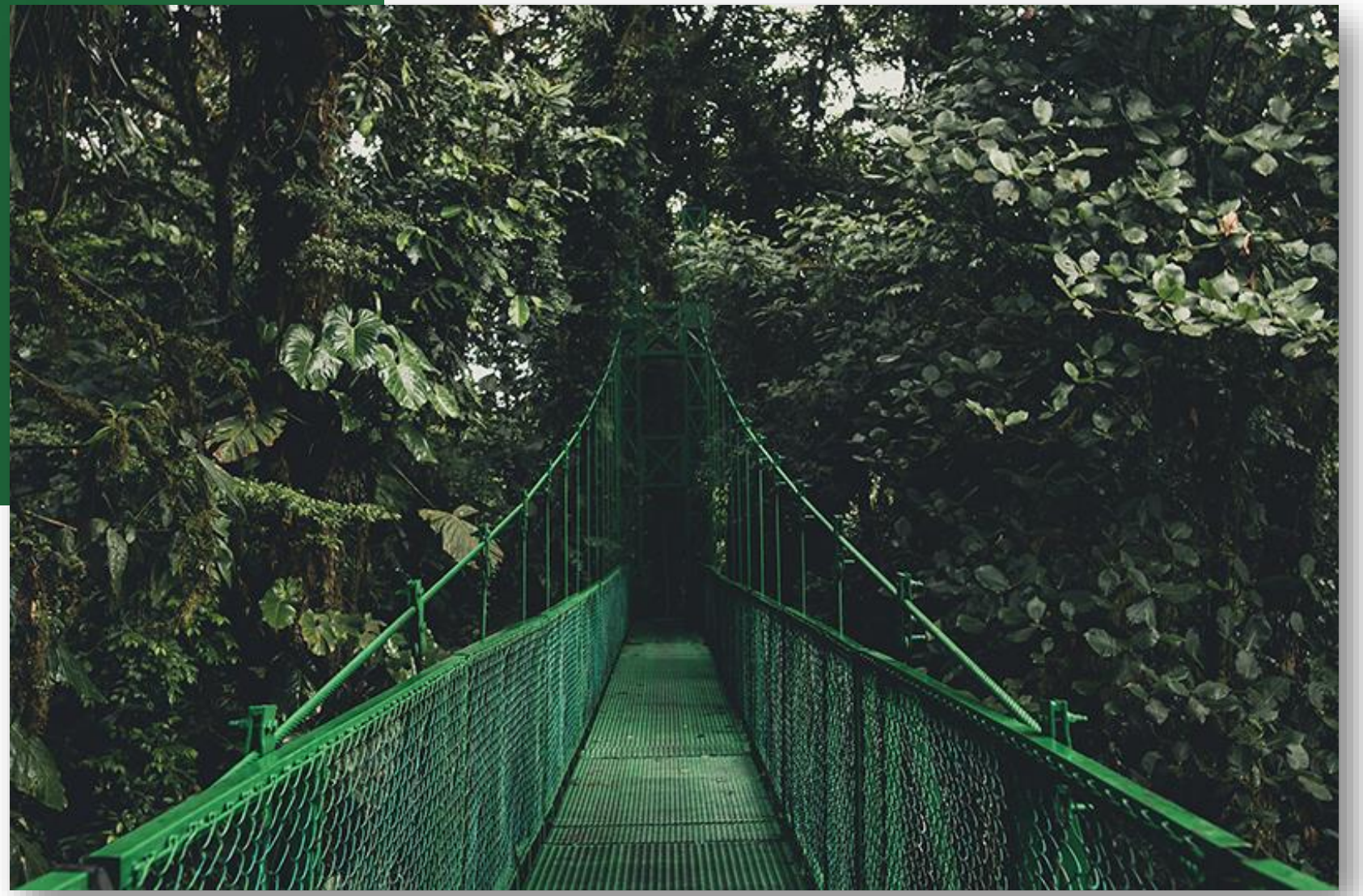
The Equity Index Pilot Project Overview & Methodology

28 June 2021

THE EQUITY INDEX



ACKNOWLEDGEMENTS

This pilot project has been made possible because of the efforts of many people. The core team (Lorriann Robinson, Alex Martins and Saagarika Dadu-Brown) would like to thank our Advisory Council members for your advice, support and guidance prior to and throughout the pilot project.

We would also like to thank Areeshya Thevamanohar and Sarah Quinn, our brilliant Research Analysts, for all of their work to bring the public equity data mapping exercise to life.

The Advocacy Team's Zahra Beg and Reem Berrada provided diligent work on our social media content, launch event, and other behind-the-scenes work.

We are grateful to Nikita Shah and Motunrayo Fagbayi for their co-authorship on our comparator mapping and definitions briefing note.

We thank our peer reviewers, Andrea Ordóñez, the Director of Southern Voice, and Hannah Ryder, CEO of Development Reimagined, for pioneering our blind peer review process.

And last but not least, we would like to thank Alex Jacobs and the rest of the Joffe Charitable Trust team for providing the start-up grant that made this work possible.

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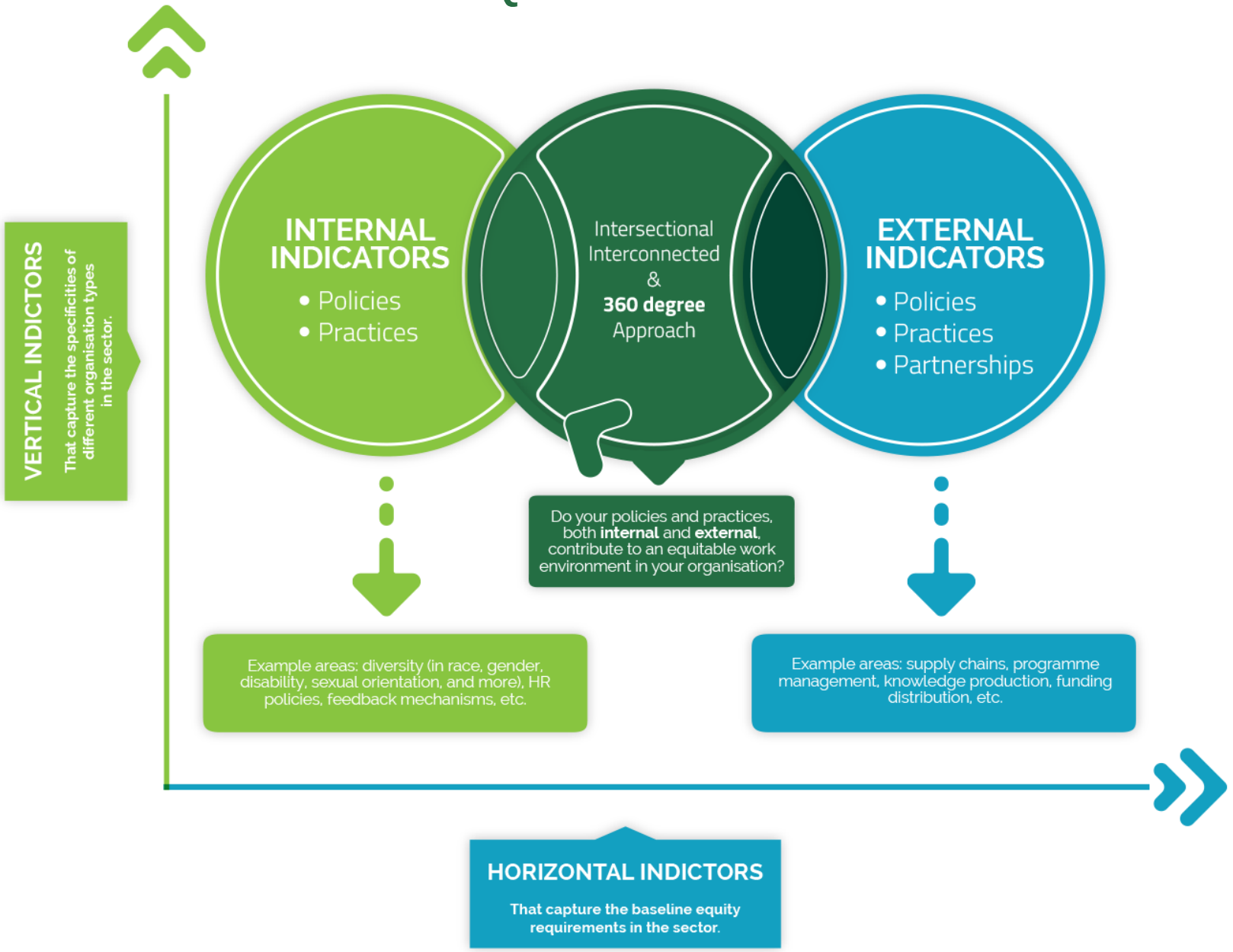
INTRODUCTION TO THE EQUITY INDEX

The Equity Index is a UK-based social enterprise (registered as a Community Interest Company limited by guarantee) advocating for greater equity across the international development sector. Our mission is to measure and track the multiple dimensions of equity in the internal and external workings of UK development organisations to influence meaningful change in their policies, practices, and partnerships. This includes racial and gender equity, equity in knowledge production, in funding, in collaborations and more.

We believe that measuring equity at the organisational level in an open and transparent way will raise awareness about the negative consequences of inequity, including the fact that development interventions are less likely to be effective and sustainable over the medium and long-term. The idea is not to name and shame – becoming more equitable is a long journey, and The Equity Index aims to foster a race to the top, rather than a race to stay away from the bottom.

Our core model is comprised of four key dimensions: **internal** and **external indicators**, and **horizontal** and **vertical indicators**. See the next slide for more information about our model.

THE EQUITY INDEX MODEL



OBJECTIVES AND APPROACH TO THE PILOT PROJECT

In May 2020 we received a grant of £20,000 from the Joffe Charitable Trust to conduct a **pilot project** with a focus on the **UK development consultancy sector**, ranging from small consultancies to larger corporate companies. The pilot project ran from July 2020 to June 2021.

Our overarching goal was to demonstrate a new and impactful way of measuring equitable practice within and across development organisations. The pilot was comprised of three central pillars:

- Conducting background research on equity in the sector, with a focus on entry-points for reform;
- Developing indicators to measure equity in the organisational practices of consultancies and assess a sample of pilot organisations again them;
- Crafting an advocacy strategy and publicly launching the pilot results via a specialised website and a virtual event.

This pilot provided an opportunity for The Equity Index to test a core part of our **Theory of Change**: *that creating and measuring a sample of organisations against internal and external equity indicators, when combined with advocacy efforts across the sector, will lead to organisational shifts and broader cultural change in the development sector.*

You can find more background on this here.

STAGES OF THE PILOT

THE EQUITY INDEX

Continuous background research

- A review of resources and stocktaking of existing indices, policy, practices, and learning on equity

Indicator development & pilot organisation sampling

- Development of a longlist of 39 indicators based on a series of consultations
- Selection of UK-registered consulting companies as pilot organisations

Pilot assessments & public equity data mapping

- Assessing pilot organisations against an indicator assessment framework comprised of 6 internal and 6 external indicators that measure equity at an organisational level
- Development of a public equity data mapping based on 6 areas of data transparency

Advocacy & outreach

- Advocacy activities including events, consultations and targeted outreach
- Work to be part of the movement towards creating a sector that is more equitable

PILLAR 1 | RESEARCH

We adopted an iterative, qualitative approach to the pilot research approach, driven by new questions and needs that arose throughout the project.

Comparator mapping exercise: We began with a comparator mapping exercise and research report, which outlined a range of sources we have learned from and intend to build on. The purpose of the mapping was to conduct background research enabling us to fill existing gaps in an additive and complementary way. The sources were presented in two main sections:

a) Comparator organisational indices: Indices that have components or indicators that are relevant to different aspects of equity;

b) Comparator indicators/datasets: Other data sources that have measures or indicators relevant to different aspects of equity.

Definitions exercise: We produced a definitions briefing note entitled ‘So what do you mean by equity?’ that summarises commonly used definitions of equity, including overarching definitions and definitions of internal equity (within a diversity and inclusion context) and external equity (within a global development context). Equity is in many ways a misunderstood term, often conflated with the term ‘equality’ despite being very distinct. The aim of the briefing note was therefore to present a survey of prominent definitions to both demystify and contextualise the term within a global development setting.

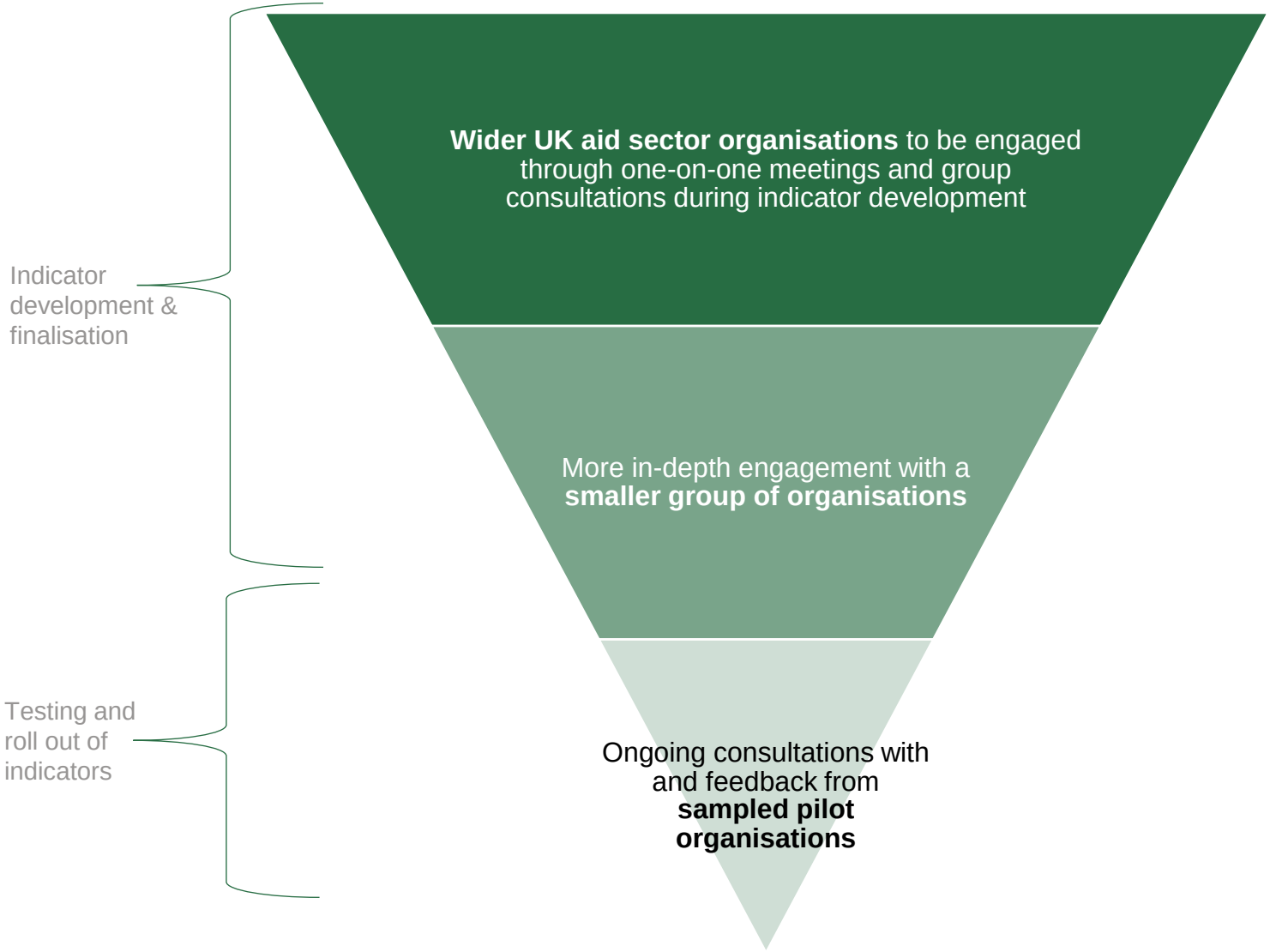
PILLAR 1 | RESEARCH – PUBLIC EQUITY MAPPING

To complement the data collected directly from 4 sampled pilot organisations, this mapping provides a summary of publicly-available equity data from 36 consultancies operating in the UK development sector. In cases where an organisation has international presence, we have focused primarily on data from the UK branch/part of the company. We collected data across six areas:

1. Public statements on equity
2. Transparency and breakdown of Board and senior leadership composition
3. Recruitment targets for under-represented groups
4. Pay gap reporting (gender and ethnicity)
5. Inclusion in other indices or initiatives related to equity
6. Publishing of IATI disbursement data to subcontractors/ partner organisations

The purpose of the mapping was to assess how much equity-related data currently exists in the public domain to feed into the development of the wider index post pilot. You can view the final Google Data studio tables on our website: https://theequityindex.org/pilot-index.

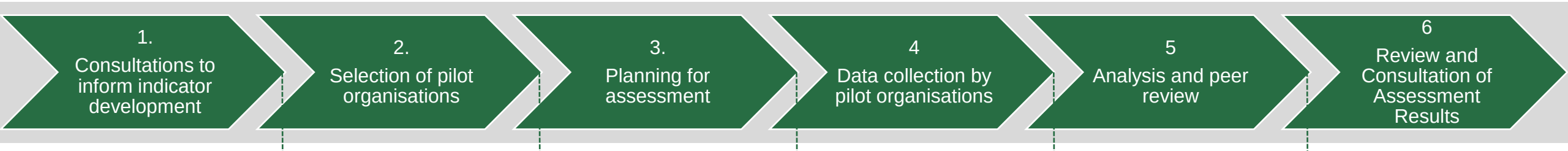
PILLAR 2 | INDICATOR DEVELOPMENT - A) APPROACH



Sampling dimensions for the pilot organisations:

1. Size of the organisation (ranging from small to large, based on number of employees);
2. Primary focus of the organisation (international development, corporate services or construction/engineering);
3. Amount of UK Official Development Assistance received over the last 5 years (ranging from small to large allocations);
4. Extent of global footprint (ranging from no offices abroad to large number of international branches).

B. INDICATOR DEVELOPMENT AND PILOT ASSESSMENT PROCESS



Introductory webinar and consultation with British Expertise International in Sept 2020 with 18 participants

A wider consultation with stakeholders from across the UK development sector in Oct 2020 with 12 participants.

Inputs via an online consultation form.

Deep dive review from our 12-member Advisory Council

Series of one-on-one consultations through individual stakeholder meetings (38 in total) with a wide range of actors

Total organisations contacted

22

Accepted participation

4

Declined participation

12

No response

6

A **planning call** was held with each organisation to go through the pilot indicator framework and establish a timeline for next steps.

A **data gathering** phase during which the pilot organisations completed the indicator framework and provided supporting documentation as evidence.

An **assessment and peer review** phase during which The Equity Index team and external peer reviewers analysed the data provided and scored each indicator.

A **review and consultation** phase during which The Equity Index team presented the findings of the assessment to each organisation and undertook consultations to discuss how further progress can be made – the scores and results from the assessment were shared confidentially with each pilot organisation.

C. INDICATOR PRINCIPLES & ASSESSMENT FRAMEWORK

The 12 indicators used in the pilot assessment framework were drawn from a longer list of 39 indicators. Those selected represent some of the minimum standards we would expect from the sector in terms of internal and external equity (which we refer to as horizontal indicators). We have also tested some consultancy-specific indicators (vertical indicators). The indicators selected for testing were guided by several general principles. The indicators aim to be:

- Intersectional in nature
- Capturing a combination of policy and practice
- More qualitative than the quantitative
- Realistic but also ambitious
- Presenting a reasonable reporting burden for organisations
- Avoiding a tick box approach to equity and identifying entry points that can lead to meaningful change by kick-starting a process

	Internal equity	External equity
Summary of indicators	• **I-1.1, I-1.2, I-1.3:** Number/percentage of staff by category (women, People of Colour, people with disabilities, people identifying as LGBTQIA, people from the Global South) • **I-2.1:** Measurable public commitment to promoting intersectional equity • **I-2.2:** Opportunities to provide anonymous feedback on the culture of the organisation • **I-2.3:** Resources dedicated to promoting internal equity	• **E-1.1:** Number of Global South partners • **E-1.2a:** Meaningful engagement of partners in design, co-creation, management, decision-making and implementation of a project • **E-1.2b:** Mechanisms to regularly collect data from partner organisations • **E-1.3:** % of total project(s) value given to Global South partners in last 12 months • **E-1.4:** Country registration and payment of taxes • **E-1.5:** Representation of Global South partners in donor meetings

The full framework can be accessed here.

D. OVERVIEW OF PILOT ORGANISATIONS

As noted above, we worked with four organisations as part of the pilot. The following table provides an overview of their operations.

Organisation	Business size	Time in operation	Focus areas	Extent of global footprint
Agulhas Applied Knowledge	Small	18 years	Research and strategy	No international offices
Brink	Small	3 years	Innovation and adaptive & agile working	No international offices
Nathan Associates	Small	16 years	Economic and analytics consulting	Main office in the U.S.
The Global Strategy Network (TGSN)	Small	6 years	Conflict and social cohesion	Office in Turkey

Conflict of interest policy

In cases where a team member had a direct or indirect connection with a pilot organisation, they were completely ‘firewalled’ from the assessment process. This means they did not attend any calls with said pilot organisation, nor will they review or have access to their assessment framework and documentation. Each set of assessments conducted by The Equity Index were then blind peer-reviewed to provide an added layer of assurance.

In our online public commitment, we have outlined future steps towards maintaining The Equity Index’s organisational independence post-pilot.

D. SCORING SCALE AND CRITERIA

We applied the following traffic-light scoring scale to each indicator and component.

INDICATOR SCALE	**4**	**3**	**2**	**1**
COMPONENT SCALE *Where the average score across indicators is*	**above 3.2.**	**between 2.6-3.2.**	**between 1.5-2.5.**	**below 1.5.**
SCORE ASSESSMENT	**MET**	**MET** *with some improvements needed*	**PARTIALLY MET** *with substantial improvements needed*	**UNMET**

PILLAR 3 | ADVOCACY AND OUTREACH

As part of our advocacy and outreach, we participated in a number of events over the last year including:

- The Equity Index, represented by Saagarika Dadu-Brown, was part of a panel on racial equity and justice at the 2020 Healing Solidarity Welcoming Change conference, held on 8 October 2020.
- The Index conducted a paid training workshop organised by Results for Development as part of the International Development Innovation Alliance (IDIA) strategy week, held on 10 November 2020. There were 20 attendees, including representatives from the FCDO, USAID, SIDA, and the Bill and Melinda Gates Foundation.
- Lorriann Robinson and Alex Martins were invited to deliver a talk as part of University College London's Policy & Practice seminar series, held on 19 November 2020, a recording of which can be found here.
- Lorriann Robinson gave oral evidence to the UK's International Development Committee in Parliament as part of their inquiry on the Philosophy and culture of aid: racism in the aid sector. We also submitted written evidence to the inquiry, which you can access here.
- The Equity Index was featured at RightsCon 2021 on 7 June 2021 in a session addressing the question: International civil society organisations' future: is there one?

We have also developed a series of recommendations for UK development organisations and for government actors and other donors, which you can access here in our findings report.

PILOT BUDGET DISBURSEMENTS

Budget item	Total cost
Fees for research (core team member time)	£5,000
Fees for public equity data mapping (research analyst time)	£1,300
Fees for indicator development (core team member time)	£5,000
Fees for peer review (peer reviewer time)	£600
Fees for advocacy and communications (core team member time)	£5,600
Expenses (software, subscriptions, graphic design, web design)	£2,500
Total	**£20,000**