Climate KIC

JUNE 2025

Inclusive Design for Climate Innovation:
A Practitioner's Guide

Contacts

Contact and organisational details

Bopinc
A. van Schendelstraat 500
3511 MH Utrecht
The Netherlands

Climate KIC
Plantage Middenlaan 45
1018 DC Amsterdam
The Netherlands

Contact person
Doris Clemenz
clemenz@bopinc.org

Contact person
Wallis van Oorschot Grant
inclusivity@climate-kic.org

Contents

Introduction

An introduction to this guidebook

Guidebook introduction

Why this guidebook?

Inclusive design for climate innovation: a practitioner's guide is your go-to resource for creating programmes that embrace inclusivity from the start. Inclusivity means creating space for diverse people, perspectives, and ideas, ensuring each receives respect and equity. This extends beyond gender equality to promoting diversity, equity, and inclusion (DEI) across various underrepresented groups. Starting with inclusion not only strengthens engagement but also leads to more innovative and diverse outcomes.

When to use this guidebook?

The guidebook is designed for the process of establishing a new programme, especially for innovation projects. You can also use it to evaluate ongoing programmes or capture lessons when closing a project.

Each section combines research on the importance of inclusivity with practical exercises to apply it. Use it as a roadmap to ensure every step is intentional, inclusive, and impactful.

This guidebook is for you if…

You are planning a programme that will **support start-ups and SMEs** and want to ensure that the participants and their solutions are inclusive.

You want to **design a programme with inclusivity in mind** from the get-go and look for step-by-step support to ensure you are on track during the design, implementation and monitoring and evaluation process.

You want to **go beyond simply tracking and reporting numbers** to create a programme that makes a difference.

What will you learn?

What inclusivity is and why it matters in programme design.

How inclusive design for climate innovation stands out from other core M&E approaches - and why it is worth it.

How to meaningfully involve your target group - from planning to execution to reporting.

How to measure the impact by following the inclusive impact pathway and building inclusive metrics.

Inclusive programme design

What is inclusive programme design?

In this guidebook, programme design covers all activities in the 5-step programme lifecycle: initiation, planning, execution, monitoring and evaluation, and closure.

True inclusivity goes beyond just focusing on implementation—it requires examining your organisation, processes, and value chains from the start.

Yes, it means putting in more effort upfront, but the payoff is a more impactful and intentional programme where inclusivity is built

"Inclusive design doesn't mean you're designing one thing for all people. You're designing a diversity of ways to participate so that everyone has a sense of belonging."

Holmes, Kat. (2018) Mismatch: How inclusion shapes design

Inclusive programme design

Project initiation

- Defines project vision, goals, and objectives
- Outlines clear milestones and project timeline
- Identifies potential risks and roadblocks throughout the project

Project planning

- Outlines an estimated budget and plan for resource management
- Answers the "what", "how", and "when" of the project scope
- Clarifies project scope

Project execution

- Monitors project status as actions are taken
- Engages stakeholder and team members in open communication
- Relies on predetermined systems to keep execution moving forward smoothly

Project monitoring & control

- Tracks team performance against KPIs and goals
- Compares projected budget and scope outlines against project progress in the status quo
- Monitors quality of deliverables

Project closure

- Reflects on major wins and losses throughout the project lifecycle
- Delivers final deliverables and project outcomes
- Provides an opportunity for team reflection and discussion

Inclusive programme design

Why?

Embedding inclusivity in innovation allows for a broader market reach for new customers or adopters, enhances problem solving with help from diverse perspectives, and has the potential to create products or services that more positively impact people's lives.

Watch this short explainer by King's College London on Why Inclusive Innovation Can Change the World (2023).

Reactive vs proactive programme design

When it comes to programme design, you typically face two options: responding to a tender or partnership call (a reactive opportunity) or collaborating with a funder/partner to create a programme from scratch (a proactive opportunity). Both present unique challenges and opportunities for inclusivity, and this guide will help you navigate either path:

Proactive design

Proactive design is ideal when time and resources are available for research, stakeholder engagement, and feedback. The upcoming chapters will guide you on being inclusive in programme planning, execution, and monitoring & evaluation (M&E).

→ Offers creative freedom with feedback loops from stakeholders to ensure impact.

→ Provides flexibility with timelines and budgets to allocate resources for inclusion throughout

→ Co-creation can be time-consuming, straining internal resources.

Reactive design

While this guidebook focuses on proactive design, we've included shortcuts to key resources for applying inclusive design under tight constraints. After approval, revisit this guidebook to apply proactive design.

→ Focuses less on the high-level 'what' and more on the 'how'

→ Quick turnaround to determine implementation, but with less creative freedom, adhering to funder guidelines and timelines.

→ Limited time to draft proposals, but resources like the guiding principles and the design checklist can help incorporate inclusivity at a surface level.

Design guiding principles

Be intentional

Make inclusivity a deliberate part of your programme design by setting specific goals, dedicating resources, and seeking diverse perspectives.

E.g. Ensure that advisory boards or planning teams include members from underrepresented groups.

Inclusion from the get-go

Integrate inclusion into the foundation of your programme, so every decision, whether in planning or execution, reflects diversity and equity.

E.g. When drafting your programme's goals, include diversity metrics to guide all stages of development.

Nothing about us without us

Ensure that affected communities are given a voice and are involved in the programme design.

E.g. If you are creating a programme for marginalised groups, include them in decision-making roles to reflect their needs and priorities.

Be accountable and learn

Continuously evaluate your inclusivity efforts and remain open to feedback, using it to improve your approach.

E.g. Set up periodic reviews to assess progress on your programme's inclusion targets and adapt based on input from stakeholders.

1.
Defining inclusivity

How to ensure that everyone is aligned towards the same goal

Defining inclusivity

Introduction to inclusive programme planning

Learning objectives

In order to undertake inclusive programme design, it's important to understand what inclusivity means and how to define marginalised or 'at-risk' groups you aim to target. Key learning objectives are:

→ Understanding why inclusivity is important and techniques for defining 'at-risk' groups.

→ Understanding and trying out your own approach to power mapping with the stakeholders you have in your project.

→ Understanding the importance of intersectionality and how you can embed this into your work.

Watch this short video on what is inclusion from Down Syndrome Queensland.

What is inclusivity?

Inclusivity is the *"fact of including all types of people, things or ideas and treating them all fairly and equally"* (Oxford Dictionary).

How does this defer to diversity? Verna Myers highlights there is a symbolic difference between being invited to the dance (**diversity)** and being asked and/or able to dance (**inclusion**).

The process of inclusion is also about **power.** Who has the power to decide, who is included, and who is not. As programme designers, we are often the ones holding the power.

No programme or project can be 100% inclusive all the time - it is an **ongoing process** with iterations and adaptations to reflect on the feedback given
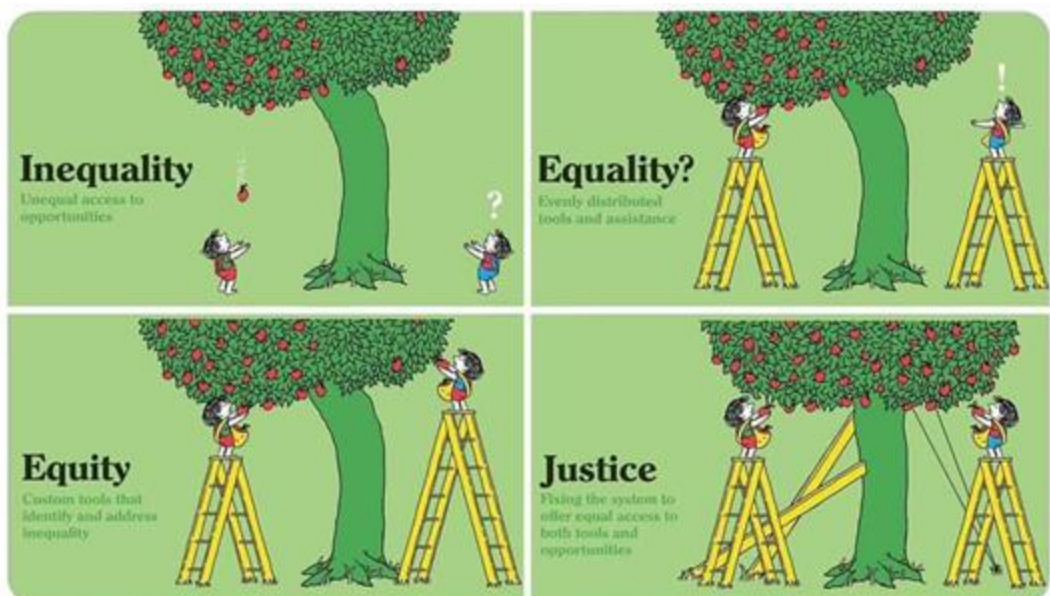
Source: Design in Tech Report (2019)
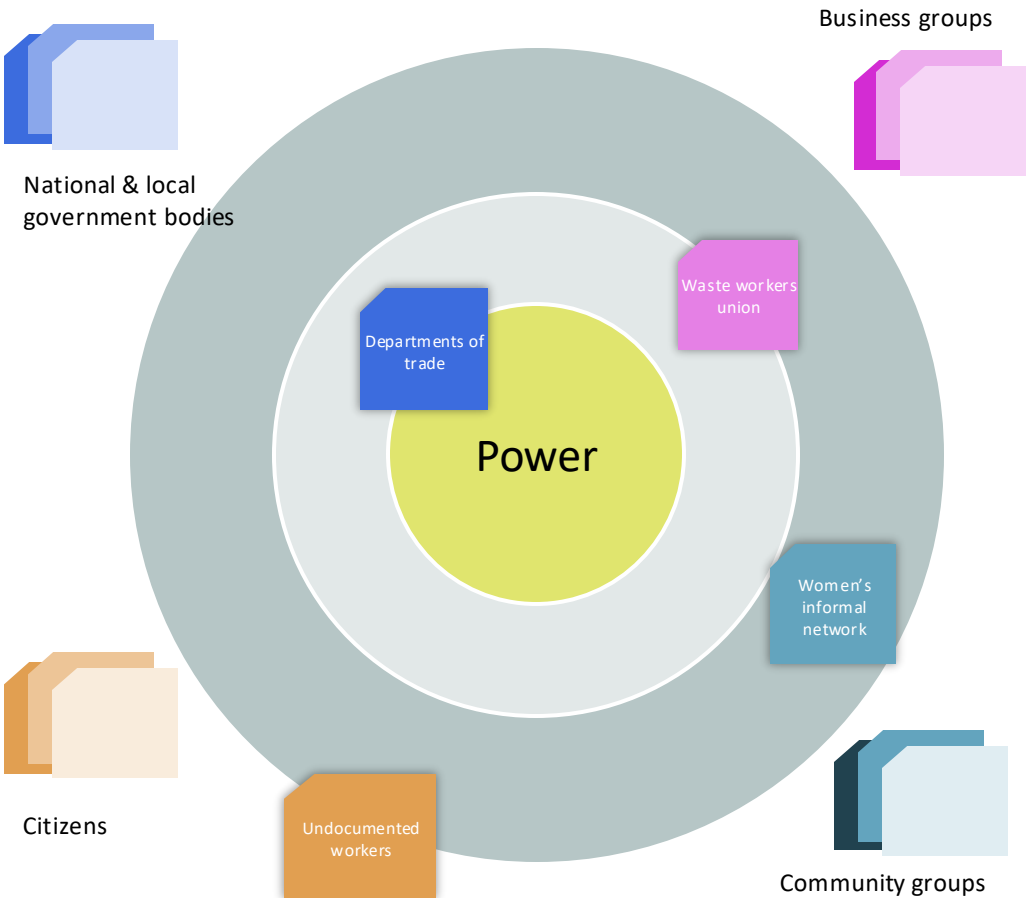
Stakeholder and power mapping

Before you begin any project, it's important to map your stakeholders, including those who may not usually be invited or engaged in these spaces, and understand the power each of them holds.

Stakeholders are individuals, groups, or organisations who are affected by or can influence your project. They can include community members, government bodies, funders, civil society groups, private sector actors, and others connected to your area of work.

Start by thinking about who is directly or indirectly impacted by your project, who makes decisions, who holds knowledge or resources, and who has the potential to support or block your progress.

You can make a basic **power mapping matrix** to detail your project stakeholders. The closer they are to the middle of the circle, the more power they hold. Here is an example and more information from Adaptation Scotland on how to carry out power mapping exercises.

Have a go at doing your own power mapping exercise.
Which stakeholder groups end up closer to the middle?

Business groups

National & local government bodies

Departments of trade

Waste workers union

Power

Women's informal network
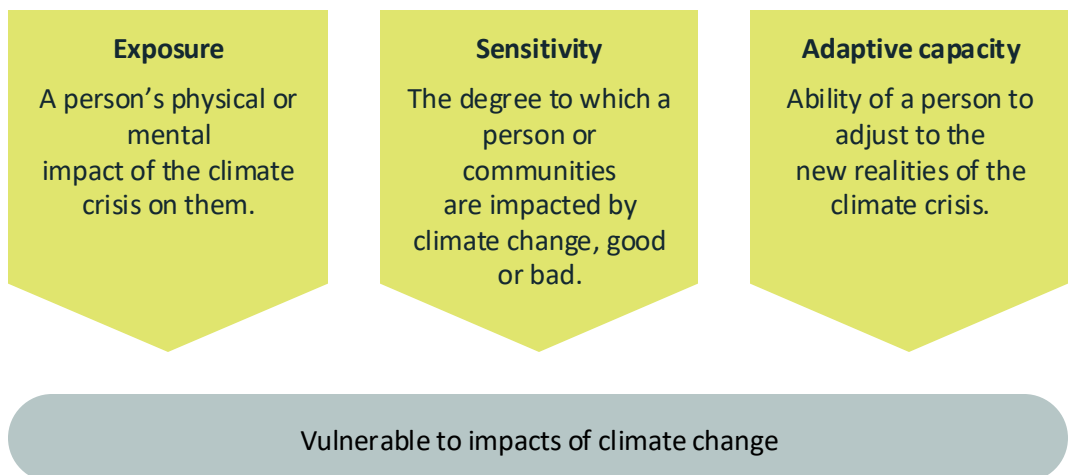
Citizens

Undocumented workers

Community groups

Marginalised or 'at-risk' communities

Using your stakeholder power mapping, you should be able to see which stakeholders hold less power and can, therefore, possibly be at risk of marginalisation. At Climate KIC, we use the term 'at-risk' to define groups or individuals who already experience inequality, which is exacerbated by climate-related risks. This includes **women, gender minorities, children and young people, elderly people, people with disabilities, LGBTQIA+ people, members of minority groups, indigenous peoples, refugees, migrants, people living in extreme poverty.**
Every context will be different. It's important to map your own 'at-risk' groups you aim to target. What makes someone vulnerable to climate change? One way to think about this are the categories below:

Exposure

A person's physical or mental
impact of the climate crisis on them.

Sensitivity

The degree to which a person or communities are impacted by climate change, good or bad.

Adaptive capacity

Ability of a person to adjust to the new realities of the climate crisis.

Vulnerable to impacts of climate change

Adapted from: Climate and Health assessment (2003)

Marginalised or 'at-risk' communities

Activity

Using the categories mapped out before, fill in this table **with your stakeholders** and tick whether they fit each category and why. This will help you see the vulnerability your groups have with regards to your local climate contexts.

Example:

| Stakeholder group *title or description*	Exposure *yes/no + explanation*	Sensitivity *yes/no + explanation*	Adaptive capacity *yes/no + explanation*
Elderly people and climate change vulnerability	Elderly people are more exposed to extreme heat events, especially those living alone in urban areas with limited green space or ventilation. Heatwaves are becoming more frequent and intense due to climate change, and older adults may be less able to physically escape or avoid these conditions.	Older adults are often more sensitive to climate-related stressors due to pre-existing health conditions (e.g. heart or respiratory issues), reduced mobility, or reliance on medication. Even moderate climate impacts can lead to severe consequences for their well-being.	Their ability to adapt may be limited by factors such as fixed income, lack of access to reliable transportation, digital exclusion (e.g. not receiving early warning systems or alerts), or social isolation. This makes it harder for them to take preventive measures or seek help during climate-related events.

Marginalised or 'at-risk' communities

Identities do not exist separate to one another, they interact everyday to influence a person's experiences. Understanding how these identities intersect allows for more effective and inclusive strategies when designing programmes.

**Think about your local area's wheel of social identity.
Which identities intersect?**

For example, in many cities experiencing rising summer temperatures, an economic migrant woman working in low-wage domestic work and living in overcrowded housing will be impacted differently from a local citizen in stable employment with access to healthcare and social protection.

Although both may experience the same heat, the migrant woman may not have the financial means to cool her home, take time off work, or access health services during a heatwave. Her migrant status, gender, income level, and housing situation all intersect to increase her vulnerability to climate impacts.

Designing inclusive climate strategies means acknowledging and addressing these overlapping layers of inequality.
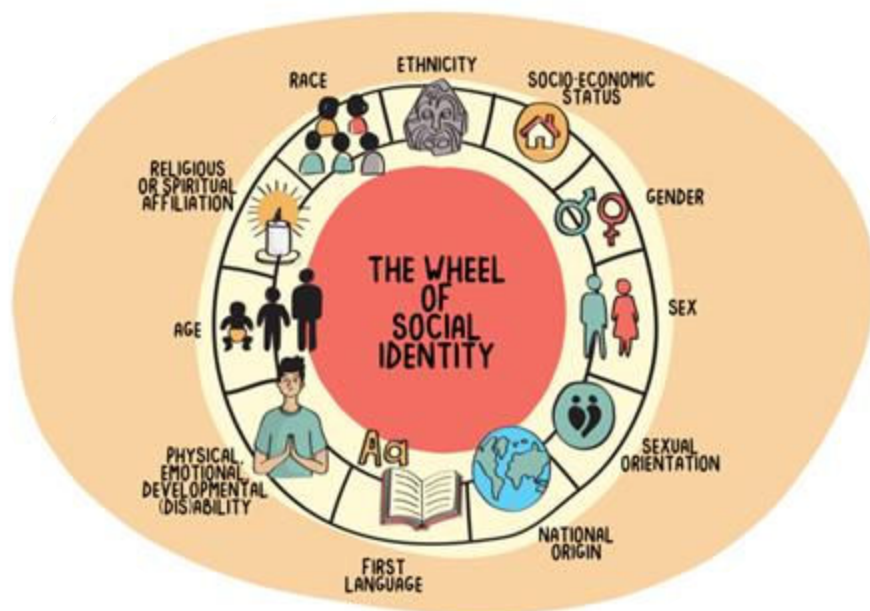
Source: The Wheel of Social Identity, The Wright Center

Inclusive programme design checklist

Defining Inclusivity

Now that we have looked at some key concepts of inclusivity, take a moment to reflect on where your team and program currently stand. We encourage you to come back to this checklist any time you design a new program.

☐ I understand why inclusivity is important and will champion it within my organisation and programme.

☐ I have defined my 'at risk' groups to be aware of any unexpected effects (positive or negative) on them due to my programme.

☐ I understand the power dynamics within my programme (ideally through a power mapping exercise).

☐ I understand the importance of intersectionality and how I can take that into consideration in my programme.

☐ I am actively reflecting on my own biases, assumptions, and position of power, and how these may influence the way I design or implement programmes.

2.
Inclusive programme planning

How to include inclusivity from the get-go

Inclusive programme planning

Programme planning covers the **'what' 'how'** and **'when'** of programme design, e.g. when you set up your roadmap to achieving goals and allocate human and financial resources. This is a critical stage in inclusive programme design, as it allows you to embed inclusivity from the get-go of your programme.

Learning objectives

→ Understand the difference between traditional and inclusive programme planning.

→ Become aware of how your organisation's values and personal beliefs can influence programme execution and outcomes.

→ Understand who you are aiming to impact and how to involve your target group in a meaningful way.

→ Design team composition and partnerships to leverage diverse voices and input.

→ Set your timelines and budget to account for inclusive practices.

Inclusive programme planning

As with traditional programme planning, inclusive programme planning outlines how a project will be executed, monitored, and controlled. With a few adaptations to your original set-up, you can ensure a more relevant programme with more impactful outcomes:

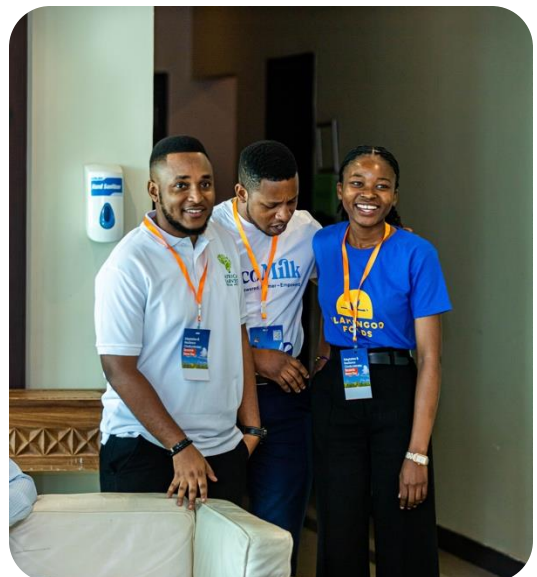|	Traditional programme planning	Inclusive project planning
Programme objective	Focuses on achieving specific, measurable outcomes for the general target audience.	Ensures internal alignment on objectives that consider diverse needs and impacts on different groups.
Programme scope	Defines deliverables based on standard project goals.	Incorporates input from diverse stakeholders to ensure the scope includes and addresses the needs of all groups.
Project team	Assigns roles and resources based on availability and expertise without specific inclusivity considerations.	Ensures diverse representation in the project team and includes resources to support participation of underrepresented groups.
Stakeholders	Engages stakeholders based on their influence and importance in the project.	Actively seeks out and includes underrepresented groups, ensuring diverse perspectives are integrated into decision-making processes.
Timeline	Standard timeline based on typical workflows.	Considers different timelines that might be necessary for inclusivity, such as accommodating different work hours or cultural practices.
Budget	Budgeting focused on general project costs.	Allocates budget for inclusive practices.

Inclusive programme planning

Programme objective

Inclusive programme planning should start with internal reflection to ensure that everyone is aligned on the goal you are aiming to achieve. This has a positive impact on your organisation's and the project's success:

→ **Increased commitment**
Employees who actively participate in goal-setting discussions show significantly higher levels of commitment to project goals.

→ **Team empowerment**
Involved team members show increased job satisfaction and perceived autonomy and empowerment.

→ **More innovative outcomes**
It also gives you a chance to listen to people from different backgrounds which is likely to challenge the status quo and bring different perspectives to problem-solving, leading to more innovative solutions.

Walk the talk and foster inclusivity within your own organisation by inviting your team to become part of the design process. You can either work this out in a group setting or ask your team to submit feedback individually and then share it in the group. The next two slides state a few guiding questions (the why and what) that can facilitate discussions to align on two main principles.

Inclusive programme planning

The why: organisational and personal values

Your values set the basis for how your organisation operates and guides decision-making and behaviour. However, the key message of those values often gets lost in day-to-day work. Programme planning is an opportunity to reconnect with those values. Make sure you discuss:

Top value: Which of our organisation's values aligns most with the programme? Look at your organisation values and identify the one (or two) that align the most with the programme. How does it align?

Values in action: What do we want those values to look/feel like? Even if talking about the same values, people might still have different views on how they should be lived. Talk about which actions would be in line with the top value, and what would be unacceptable behaviour.

Influence: How can our values (positively) influence the programme's success? How will this value help your team in the programme implementation? How will it impact your target group?

Personal values: How do your personal values align with this programme? Which values do your team members hold, and how will they impact the programme? Are there any conflicting values? For example, values around precision and attention to detail might clash with an urgency for speed or creative process.

Inclusive programme planning

The what: context

Besides being aligned on values, you also want to ensure that your team is aligned on the context in which the programme sits.

Action: *Have all your programme staff complete the questions below and see if everyone agrees.*

Problem: What issue does the programme target, and is it the same for all groups involved?

Population: Who is affected by this problem? Think beyond one-dimensional profiles, and also take gender, race and other demographics into account.

Beliefs: What assumptions do we have about the target group, and how might different environments affect the problem? Discuss how individual beliefs and perceptions can shape the programme outcomes.

Context: What is the context that this problem exists in? Is it the same for all groups involved? You might want to spend some time identifying where the problem stems from, and whether it is intensified or eased by the environment at hand.

Gaps and barriers: What gaps or barriers exist, and are any within our influence to address?

Solution: How does the proposed solution incorporate inclusivity to ensure accessibility and benefit for all groups? Take the above into account, and brainstorm about how your programme will address potential differences.

Inclusive programme planning

Programme scope

In the start-up space, the most common reason why products and services fail is because the team built something that nobody wants or needs. It is important to fall in love with solving the problem, not with the solution you want to build. Programmes are no exception to this phenomenon, and it's easy to fall into the same trap. To ensure you create something truly impactful, follow a few simple do's and don'ts:

Do's	Don'ts
Do your research Spend time to understand your target group, and involve them from the get-go of programme planning.	**Don't rush the research** Avoid hurrying through the research and discovery phases. Rushing can lead to overlooking crucial insights about the group's needs, particularly those from underrepresented groups.
Use participatory approaches Invite your target group to co-create solutions that truly make in impact to their unique situations.	**Design based on assumptions** Avoid assuming that what works for one group will work for all. This can lead to excluding certain groups or failing to meet the needs of those with different requirements.
Facilitate communication Establish dialogue that encourages ongoing interactions between team members and stakeholders. Use inclusive language and ensure that all voices are heard and respected.	**Listen only to loud voices** Don't limit stakeholder involvement to majority groups. This can result in a lack of representation for at-risk communities, leading to a product or service that is not truly inclusive.

Inclusive programme planning

Programme scope

Case study: A slow and steady journey towards inclusivity

ClimateLaunchpad (CLP) is an example of how a programme can learn from design fails and successfully introduce inclusive programme design later in the process:

Design fail

Operated by TU Delft and Climate KIC, CLP is the world's largest green business idea competition. Before going global, CLP was only active outside of Europe, but was run by an entirely European team. It came to the CLP team's attention that National leads did not see themselves in the CLP promotion or education materials, and this lack of inclusive and relatable examples did not serve participants well. Also, gender mainstreaming was prioritised for countries outside of Europe.

Design correction

The first step CLP took was to adapt education materials to include local examples and update outreach and communication materials to be sensitive to diversity, equity and inclusion. Gender mainstreaming handbooks and training became a standard part of curriculum and they recruited local trainers and hosts. CLP made an effort to build community awareness around inclusivity holding a diversity in entrepreneurship panel in 2022. Lastly, the programme set mandatory inclusivity KPIs. In 2024, LATAM/ Pacific Islands have 40-45% women participants, Nigeria has 50%, and Africa & Asia Pacific's 1st place winner was a woman-led team.

Inclusive programme planning

Programme scope

Do your research

Before jumping into solutions-mode, it is important that you do not simply assume you understand the challenges of your target group but that you do your research. Uncovering the right information requires a research strategy that recognises different layers of information. Oftentimes it is difficult for people to articulate their needs, and not everything is being said out loud.

What people

Surveys

Interviews

Observations

Remote sensors

Self-documentation

Co-creation

Say

Do

Feel

Superficial insights (explicit) that are easy to gather

Deeper insights (implicit) that are are hard to gather

How to start?

Think about what you want to learn. Do you want to gain quantitative insights or do you want to learn more about attitudes and behaviours?

Once you know what you are looking for, you can choose the right insights methods. The next slide shows the most commonly used research strategies for inclusive programme design.

Inclusive programme planning

Programme scope

Do your research

Depending on nature of the project, research needs, and the needs/preferences of the stakeholders involved, choose at least one participatory approach, in addition to the traditional desk research:

Research Method	How to use it
Desk research: Review of existing quantitative and qualitative data.	Publicly available databases, World bank & UN websites, past programme reports and insight studies, inclusion policies and action plans.
Observation methods: Observe your target group to understand what cannot easily be said.	(Unplanned) visits in selected places and people shadowing help you to study what people do in a specific situation in real life. Spend time with them and take part in their daily activities.
Monitoring methods: Learn about everyday experiences and habits through non-intrusive methods like self-documentation.	With self-documentation methods like Photo Journals, you invite your target group to become active researchers themselves and document their day-to-day activities. You can also use smartphones to track activities (e.g. screen time).
Co-creation methods: Let your target group become part of the solution design, and see how people respond to your ideas.	Getting your target group to participate in the creation of activities helps you understand how they think, what they value, and may surface unexpected themes and needs. You can learn more about co-creation on the next slide.
Mapping methods: Work with your target group to visualise aspects and relationships.	You can map out different stakeholder relationships, resource flows, prices or even social connections. For example, you can use the Stakeholder Power Mapping.

Participatory approaches

Inclusive programme planning

Programme scope

Co-creation methods

A great way to involve your target group from the get-go is to organise co-creation activities. These allow your target group to actively participate in the planning process and validate key components of your programme. It also fosters a sense of responsibility and empowerment among those participating, thereby increasing the likelihood of long-lasting impacts and success of the project.

Best practices

Be mindful of cultural norms and practices (i.e. Do you need to consult elders, religious or community leaders before or during the workshop? Can men and women participate in the same room at the same time?).

Establish that these co-creation sessions are a judgement-free zone, and follow through when people break these rules.

Make sure that everyone is being heard. If the group is too big (i.e. more than 15-20 people), consider splitting them into smaller and more interactive working groups.

Make accommodations to allow all groups to participate (i.e. Check locations for wheelchair accessibility, plan your sessions at times that allow people with care responsibilities to participate).

Consider what you can 'give back' to participants in return. You may be asking for their resources, hours, and in some cases, emotions. Make sure that you keep them updated and engaged beyond the co-creation itself, so they can see what their inputs have contributed to.

Create an atmosphere where people feel comfortable sharing their personal experiences.

Inclusive programme planning

Programme scope

Case study: Community listening toolkit

The Community Listening Toolkit from Development Alternatives is a great example of 'deep listening' with communities in order to uncover local dynamics that highlight the aspirations and challenges of entrepreneurs in your community. The toolkit has lots of practical ways for community listening such as:

- *Field note template*
- *Day in the life template*
- *Games and activities for a virtual community chat*

All of these activities allow for collective sensemaking of a situation, allowing for programmes and solutions to be co-created together, rather than separately.

Source: Community Listening Toolkit

Inclusive programme planning

Programme scope

Value proposition canvas

A practical tool that you can use during the co-creation workshop is the value proposition canvas. Initially created for marketing experts and product owners, it has found its way into the innovation space to help match a programmes' value proposition (on the left) to the needs and wants of their target audience (on the right).

How to use it?

Familiarise yourself with the tool (e.g. watch a quick explainer video like this one) and ideally print out A3 sheets for participants to use.

In your co-creation session, explain the canvas, and start with the Audience Profile on the right side. Spend time here and dig deep into the goals, gains and pains of your target group.

Then start working on the left sheet and see what you can offer to create the most value.

Inclusive programme planning

Programme scope

Case study: PlayPump

We can use the value proposition canvas to come back to an example of poor design: the PlayPump. You can see below the gains and pains of the target audiences (the adults needing water, and the children wanting to play) and how the pump was supposed to address them (providing access to clean water while also providing a fun and easy activity to children).

Inclusive programme planning

Programme scope

Case study: PlayPump

We can use the value proposition canvas to come back to an example of poor design: the PlayPump. You can see below the gains and pains of the target audiences (the adults needing water, and the children wanting to play) and how the pump was supposed to address them (providing access to clean water while also providing a fun and easy activity to children).

So, what went wrong?

The PlayPump was very inefficient at collecting water and in fact, took longer than the hand pumps that households were already using. We know how time-consuming collecting water is, and the PlayPump did not alleviate that pain.

We also know that when water is in high demand – in the morning, early evening and when wet outside – children are not available. In these cases, women would have to pump the water themselves using the PlayPump, which was positioned very low and gave them a sore back.

If we look at the pain of carrying heavy water, this is also not addressed

Clearly there was a mismatch between the customer pain points and the product. If the women and children had been involved in the planning process, these challenges would have been surfaced before deploying the pumps and spending any money.

Inclusive programme planning

Human resources

It is important to look at representation among your team. When educators designing and delivering programmes reflect the cultural, racial, and ethnic backgrounds of their learners, programmes have shown to be more effective in engaging participants, improving learning outcomes and creating a more inclusive and supportive environment. If you identify gaps in representation, proactively address them by adding diverse team members, or identifying external consultants and partner organisations that could bring in the needed perspective. **Ask yourself:**

	What	Why
Representation	Is the programme team representative of the target group?	Look at your team's gender, race, ethnicities, cultural backgrounds and see where they overlap with the demographics of the target group. Representation should also come from within your organisation to foster connection and show commitment.
Lived experience	Can your team relate to the experience of the target group?	Involving people with lived experience in programme development can bring in a deeper and more nuanced understanding of the situation at hand. This helps to ensure that solutions actually meet the needs of the target group.
Leadership	Is representation achieved in different levels of the programme?	Often dominant groups such as global minority staff and men are more represented in leadership and management roles than global majority women. It is important to have representation through all levels in your programme to live up to employees' and your target group's expectations.

Inclusive programme planning

Stakeholder engagement

Inclusive programme planning is built on collaboration, internally and externally. It should therefore include a myriad of different stakeholders, such as direct and indirect beneficiaries of your programme, their communities, local NGOs, grassroots organisations, think tanks and policy stakeholders.

1 Identify which stakeholders should be part of the planning process by doing research and <u>stakeholder and power mapping</u>.

2 Evaluate your own strengths and weaknesses for this programme, and consider partnering or forming consortias with organisations that have deep(er) roots within the community.

3 Decide how you want to involve each stakeholder group. You can either:
- **Inform:** One-way communication from your end to provide updates on the status, successes and challenges.
- **Involve:** Two-way communication to receive feedback and hear opinions
- **Collaborate:** Involving the stakeholder in decision making
- **Empower:** Delegate decision-making to a stakeholder (think participatory grant making)

Needless to say, the most value will be derived from the latter stages of stakeholder engagement.

Inclusive programme planning

Stakeholder engagement

Tip for effective stakeholder engagement: the community advisory committee

Instead of involving new community members at each stage, consider forming a community advisory committee. This group should consist of individuals who share identity, geography, or experience with your at-risk group. You can identify key thought leaders through interviews and network analysis.

The committee will provide insights on how to support their community throughout the programme while ensuring focus and gaining broader community buy-in.

This can also be a meaningful way to combat a potential lack of diversity of a planning team/programme staff.

Learn more here: Tools and Resources for Project Based Community Advisory Boards: Community Voice and Power Sharing Guidebook

Inclusive programme planning

Timeline and Budget

When people think about inclusive programme design, timelines and budgets are usually not what comes to mind. However, there are a few adaptations that you can make that will allow for a more inclusive programme:

Timeline	Budget
Incorporate additional time for inclusive practices Participatory approaches take time, and ideally you can already set up your project plan so it includes interviews, co-creation sessions, feedback and consultation sessions.	**Allocate budget for accessibility and inclusivity** Set aside budget specifically for accessibility and inclusivity training and testing. This includes tools, services, and consultations with experts to ensure that the programme is accessible to all.
Allow time for feedback loops Inclusive practices will likely give you new insights on how to improve the programme, and you want to make sure you have time to adapt the programme and implement them.	**Budget for stakeholder engagement** Ensure the budget includes resources for engaging a wide range of stakeholders, including costs for research, compensating participants from at-risk communities, and facilitating their involvement in project scoping and feedback sessions.
Plan timelines that account for long-term change Depending on your impact goals you might need to plan additional time until you can reap (and report) the benefits of your activities. I.e. if your goal is mindset change, then a programme lasting a few weeks will likely not be as efficient.	**Include flexible grants** If grants of financial assistance is part of your programme, consider more flexible or even unrestricted grants to give your participants (who are the experts at what they do) sufficient freedom to experiment.

Inclusive programme planning

Inclusive programme planning is all about shifting power to and meaningful engagement with the people you want to impact. Whenever you think about planning a new programme, you can always come back to the guidelines below:

Four ways of meaningful participation

1. Giving the community voice

Not assuming what needs to be done, but asking them and giving them a seat at the table.

2. Improving their capacity to participate

Make your programme accessible, taking into account individual needs, backgrounds and skills.

3. Seeing their value as consumer groups

Work with innovators that market to your target groups, and help them do it even better.

4. Benefitting the wider community

Include the wider community and see how you can create impact that outlasts your programme.

Inclusive programme planning checklist

- [ ] My team and I are aligned on the programme goal and scope and have uncovered any hidden beliefs that might hinder progress.

- [ ] I have incorporated input from diverse stakeholders to ensure the scope includes and addresses the needs of all groups.

- [ ] I have used at least one participatory research approach (eg. co-creation or mapping exercise) that gives voice to the target group and allows them to directly express their needs.

- [ ] My programme team is diverse and has representatives that can relate to the experiences of various groups.

- [ ] I embrace collaboration and work with diverse stakeholders that represent my target group.

- [ ] I have adjusted my timeline to account for stakeholder participation and feedback loops.

- [ ] I have allocated budget to account for inclusive practices.

3.
Implementing inclusively

How to ensure inclusivity throughout programme activities

Inclusive programme execution

Checklist

Introduction

Inclusive programme execution is about implementing what was decided during the programme planning phase, but being flexible when you learn something new and to create the most impact for your target group.

Learning objectives

→ Learn about programme participants selection.

→ Learn how to support participants in their inclusivity journey.

→ Get inspired by other programmes and small and midsize enterprise (SME) real life stories.

Participant selection   Needs assessment   Tailored support

Inclusive programme execution

Let's start by assessing and reflecting on the current inclusivity of your programme execution. Here, and throughout the inclusive programme execution section, SME refers to the programme participants.

			Yes	No	How?
Programme level	There are a diverse group of participants in the programme.				
	I am assessing participants' needs at the beginning of the programme.				
	I am co-creating programme activities with the programme participants.				
SME level	I am mindful of the diversity within founding leadership teams of the SME involved in the programme.				
	I am mindful of the diversity within the employees hired.				
	I am mindful that the SME targets a diverse group of beneficiaries / customers:	In product design			
		In marketing and distribution			
		In communications			

Participants application

Programmatic level 1/2

Participants application

Participants selection
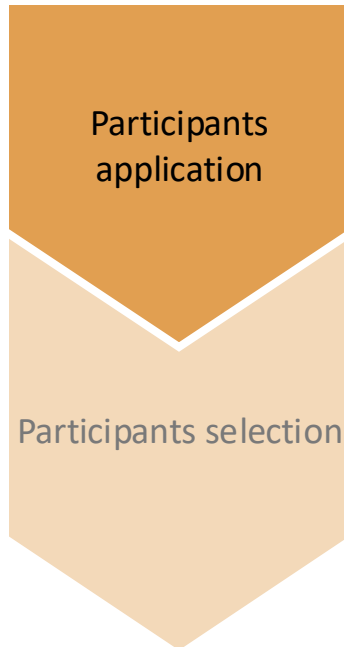
What you can do

The first step is to ensure a diverse group of participants in the programme. Here are four steps to guide you in this process:

Define what 'at-risk' means in the context of your programme. This definition will likely vary for every programme, and will therefore need deliberate reflection.

To have a diverse group of participants, you first need a diverse group of applicants. Ensure you reach out to a broad and varied group of participants when you communicate about the programme.

How you can do it

Revisit your exercises on identifying at-risk communities, power mapping and intersectionality. Be mindful about how the programme involves these groups.

Check your marketing materials for inclusive representation and language. You can use Oxfam's Inclusive Language Guide. In addition, review the networks you use to reach participants and ensure they connect with your intended audience.

Test your application materials by sharing them with a few people from your target group to gauge whether they feel represented.

Participants application

Programmatic level 1/2

Participants
application

Participants selection
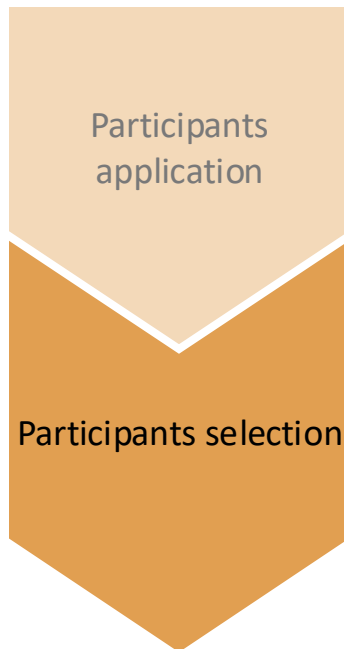
What you can do

You can't include everyone. Selection by definition means some people will already be left out. So how to make these choices the best way possible?

Assess participants interest for DEI and/or willingness of working on DEI. Ask for DEI-focused questions during the participants' screening process.

Be mindful of how you elect your selection jury.

How you can do it

Be mindful of the power dynamics in your own context. Consider using the Wheel privilege and power as a resource.

Assessing commitment to DEI can be quite complex and subjective. However, guidelines can be developed to screen for a quality answer during DEI-focused interview questions. This can be for example to look for actionable answers, and not ideals or theories. To learn more, visit Tools for evaluating applicants, University of Washington Human Resources

Participant needs assessment

What you can do

Once you have selected your programme participants, it is time to get to know them. Participant needs assessment informs the programme and enables you to:

Spending time in the beginning to build the relationship with programme participants contributes to programme success.

→ Develop *contextualised* content

→ Offer relevant resources and tools

→ Provide appropriate coaching and mentorship

→ Choose the most effective delivery methods

→ Avoid investing in unnecessary initiatives

Personal introductions	Gender and age
	Language spoken
	Location or country where one is from
	Specific needs (e.g. disabilities)
Preferred ways of working	Online or offline meetings
	Email, text or call
	Working days per week, and working hours
	Frequency of check-ins
Commitment to the programme	Participant's expectations from the programme
	Your expectations from the participants enrolled in the programme
	Most interesting topic addressed in the programme for the participant and why
	Least interesting topic in the programme for the participant and why
	Gaps already identified by the participant that the programme can address

Activity

Schedule **individual discussions** with all the participants to get acquainted with them and understand their needs. This is a non-exhaustive list of the topics you may want to get information on during this discussion.

Once you gathered this information, review your **programme content and delivery plan** and make any necessary changes to better accommodate your participants' needs.

SME needs assessment

The objective is to understand the inclusion level of the participant

Here, we will use the term "SME" to refer to the programme participant. When it comes to inclusivity, three areas are worth exploring:

Organisational level

→ Are you mindful of the diversity within founding and leadership teams of the SME involved in the programme?

SME ownership

SME founders

Diversity in senior management and board/investment committee

→ Are you mindful of the diversity within the employees hired?

Diversity in the workforce

Initiatives in place to specifically advance at-risk people

→ Is the SME using an inclusive measurement & evaluation framework?

Beneficiary level

→ Are the SME's products or services serving a diverse group of beneficiaries / customers?

Affordability

Accessibility

Availability

Awareness

→ Are the SME's products or services enhancing wellbeing of a diverse group of people? And/or contributing to equity for all?

Value chain level

→ Is the SME committed to enhance supplier and supply chain diversity?

→ Is the SME committed to working with business partners that are owned, led or co-founded by at risk groups? Or that provide access to quality work opportunities for at risk groups?

Inclusion at the organisational level

Identify where diversity is missing

What you can do

Being inclusive as a organisation creates a positive impact on the organisational culture, employee engagement, innovation, stakeholder relationships, and overall business resilience.

If your programme participants wish to learn more about the benefits of inclusion at the organisation level, you can refer them to Climate KIC's WeClim Equally gender-smart handbook for climate entrepreneurs.
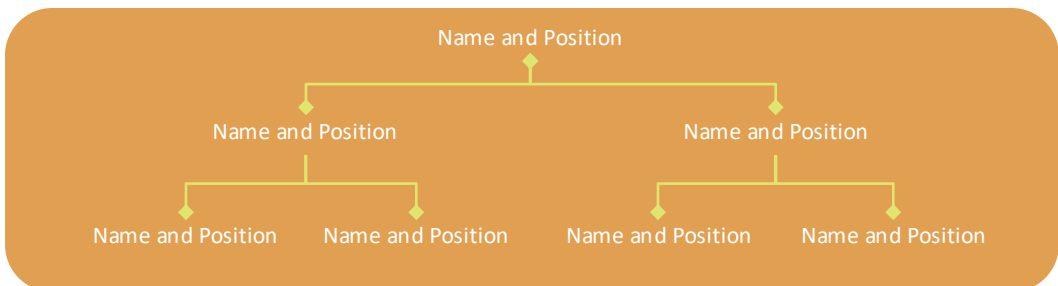
To support programme participants (SME) in becoming more inclusive, you first need to understand where the SME is at in terms of inclusion at leadership, management and employee level.

Activity

Have the SME list out the different roles and the people working in each position. Identify if and where diversity is missing.

Pay attention to diversity in inherent traits (gender, ethnicity, age, ability…) but also acquired (education, socioeconomic background, languages…).

This allows you to understand whether a lack of diversity is found all throughout the organisation, or only in specific departments.

Name and Position

Name and Position

Name and Position

Name and Position

Name and Position

Name and Position

Name and Position

Different types of bias to challenge

Likeability bias: Men are expected to be assertive, so it feels natural when they lead. Women are expected to be kind and communal, so when they assert themselves they are liked less.

Performance bias: It is based on assumptions about different groups' of people abilities. Performance of those in power tend to be overestimated, when performance of those at risk tend to be underestimated.

Attribution bias: It is closely linked to performance bias. Because we see at risk groups as less competent than those in power, they tend to get less credit for accomplishments and more blame for mistakes.

Affinity bias: People gravitate toward similar people in appearance, beliefs, and background. People may avoid or even dislike those who are different from them.

Inclusion at the organisational level

Recruitment practices

What you can do

Once you identified where diversity lacks, you can support the SME in addressing it. First area worth looking into is recruitment practices.

Biases can occur at different times of the recruitment process: in the job description and communication, and in the hiring committee and process.

Activity

Review the SME's hiring practices and plans for diverse recruitment.

People tend to be unaware of their own bias. For this reason, we advise you to do this activity with a diverse group of team members from the organisation.

	Checklist	Yes/No	If no, rationale:
Job description	Is gender neutral language used?		
	Is the number of years of experience required for the role appropriate?		
	Are the skills listed aligned with the tasks required?		
	Are the skills required or can they be acquired?		
	Are required qualities and abilities listed? Is the list reasonable?		
	Does the job offer included enough information about the organisational culture?		
Communication	Is the job offer communicated on diverse channels and with diverse organisations?		
	Are diverse candidates targeted with proactive sourcing?		
	Are salary ranges included in the job offer?		
	Does the language encourage diverse people to apply (e.g. disabled)?		

Inclusion at the organisational level

Recruitment practices

	Checklist	Yes/No	If no, rationale:
Hiring committee	Is the hiring committee diverse?		
	Are employees trained on conducting unbiased interviews?		
	What are the evaluation criteria for the role?		
	Are different options offered to the applicants to schedule the interview?		
	Are interview questions prepared in advance?		
	Are the required exercises (e.g. business case) appropriate for the role?		
Hiring process	Are you masking name, location, education, portrait before the interview?		
	What diversity percentage are you ensuring in your candidate pool?		
	Are you asking each candidate the same questions?		
	Are you ensuring interview questions do not result in bias against the candidate?		
	Are all candidates interviewed in the same environment and by the same people?		

Meeting the checklist but still failing to hire diverse staff? Referral incentives are a cost-effective way to lead to higher quality applications and increase employee engagement.

Others have done it. In India, companies struggle to recruit women, especially at senior management level. HSBC and Lenovo both introduced a financial incentive for employees to refer women from their network.

Inclusion at the organisational level

Promotion policies

What you can do

The second area worth looking into is promotion policies. For employees to feel engaged, the SME needs to make sure that advancement pathways exist for all. You can for instance suggest the SME to make an inventory of trainings relevant to employees, and to allocate budget for upskilling.

Activity

1. **Review the organisation's initiatives to advance diverse employees**
   To identify favouritism patterns and discriminatory practices, the SME can list promotion requirements and check it against past promotions. To get tips on setting up inclusive promotion policies, visit equitable promotion policy guide.

2. **Review the organisation's initiatives to**

upskill diverse employees
In performance review meetings, suggest to discuss with the employee options to meet the promotion requirements. This can include for example getting mentorship from a colleague or from an external expert or taking courses. As an employer wishing to upskill diverse employees, the organisation should allocate budget for these activities. For employee engagement towards upskilling, suggest the organisation to free some time from the employee schedule.

	Checklist	Yes/No	If no, rationale:
Promotion policies	Do you have a promotion policy?		
	Is the promotion policy accessible to all employees?		
	Are you providing pathways for advancement?		
	Do the employees know the requirements they should meet to get promoted? Are the requirements realistic?		
	Is the promotion committee diverse?		
	Do you collect (anonymous) employee feedback about the organisation's promotion practices and career advancement opportunities?		

Inclusion at the organisational level

Employee engagement

What you can do

DEI efforts at the organisation level go beyond hiring and promotions. It's essential that employees feel valued and heard in their daily work. Help the SME assess their inclusive culture.

Activity

1. **Collect employee feedback**
   Guide the SME in creating surveys or using techniques to facilitate open conversations about the workplace culture.

2. **Promote an inclusive culture as a leader**
   The organisational culture often starts from the top management and leadership style. Suggest SME leaders observe workplace dynamics for a week. Have them note who speaks in meetings, participates in knowledge sharing, or uses shared resources. Encourage them to identify areas for improvement based on these observations to promote DEI in the workplace.

   Confront the different observations, and make the leaders identify improvement areas to evolve towards more DEI in the workplace.
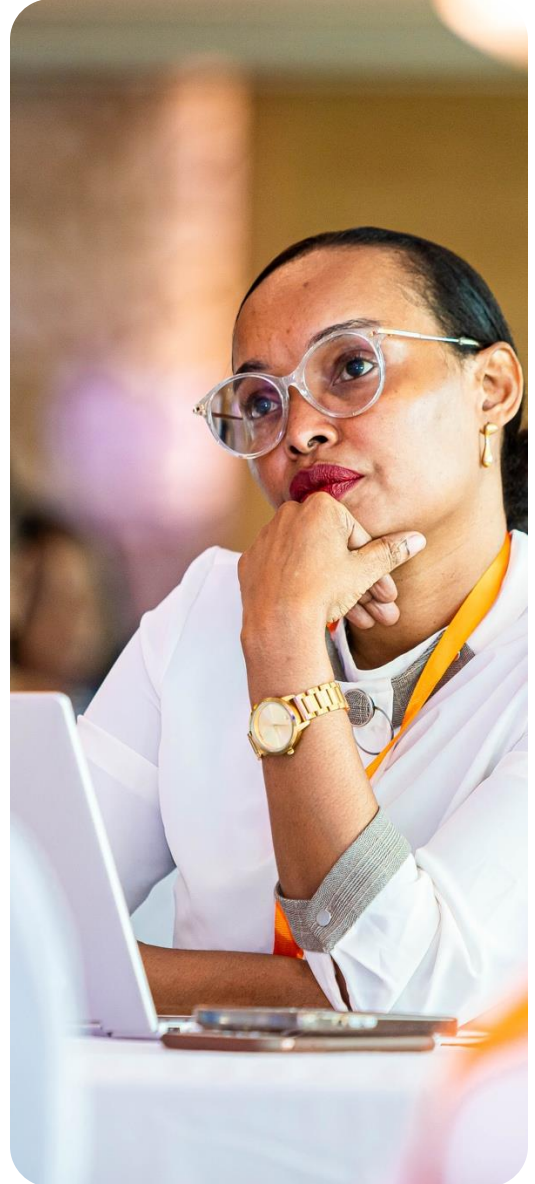
Inclusion at the beneficiary level

Identify where diversity is missing

What you can do

To reach diverse beneficiaries, you will likely also need a diverse set of products and services, as well as targeted marketing and distribution channels. This can increase complexity, but will also allow you to expand your market reach, increase customer loyalty and ultimately more sustainable business growth. For more on inclusion at the beneficiary level, visit the WeClim Equally gender-smart handbook for climate entrepreneurs.

To help SMEs become more inclusive, first assess their current products, services, and marketing channels.

What you can do

1. Perform an inclusivity assessment
This initial assessment will help the SME identifying possible gaps when it comes to dealing with their beneficiaries and customers.

	Checklist	Yes/No	If no, rationale:
Product development	Is the market research conducted with a diverse group of people?		
	Is gender-disaggregated data collected?		
	Are diverse people included in product design?		
	Is disaggregated feedback captured?		
	Are different product features preferred by different beneficiary groups?		
	How is the product being used? Does that differ depending on the various beneficiary groups?		
	Are the needs of at risk groups addressed in product design?		
Marketing and distribution	Is the product/service accessible for at risk groups?		
	Is inclusive language and representation used in marketing materials?		
	Are the brand values inclusive of diversity?		

Inclusion at the beneficiary level

Employee engagement

What you can do

Once you've identified gaps in diversity in product design, marketing, and distribution channels, help the SME address them by focusing on inclusive market research.

Activity

Revisit market research
If your initial research wasn't inclusive, it's not too late to adjust. A simple approach is to speak with diverse individuals to better understand your target group. If you have resources, conduct surveys, interviews, or focus groups to gather direct insights from the target group about their needs and challenges.

If your target group is difficult to reach, think about how you can go to them, i.e. can you bring a discussion to a community event? Can you have a stand outside the local supermarket?

Co-creation methods from your programme can also be applied to SME beneficiaries and customers.

Inclusion at the beneficiary level

Inclusive product development, and marketing and distribution **1/2**

What you can do

Following market research, let's look into inclusive product development, marketing and distribution, and communication. Help the SME make small
adjustments to reach a more diverse customer base without overhauling their product/service.

Activity

1. **Identify at risk consumer groups**
   Use the wheel of social identity to help the SME identify at-risk groups within their context.

2. **Reflect on the 4 A's of marketing**
   Acceptability: Which beneficiary groups does the product/service meet the needs of?

   Affordability: Is the product/service affordable for at-risk groups?

   Accessibility: Can at-risk groups easily purchase and access it?

   Awareness: Are these groups aware of the product/service and its benefits?

Inclusion at the beneficiary level

Inclusive product development, and marketing and distribution **2/2**

3.   Distribution
Based on the 4 A's, guide the SME in making changes to better serve at-risk groups

---

1. **Design -** Acceptability

→ **Develop a different value proposition for a at risk consumer group**
Support the SME in developing an inclusive business offer.

Others have done it
Sonke realised the poorest South Africans are paying a premium for the consumer goods. The reason is that they don't have the disposable income to buy the biggest pack sizes. As they trade down in size, the price and environmental impact increase exponentially. Sonke develops refill stations for customers to fill their own reusable packaging. Not only does this eliminates waste, but it also offers consumers up to 50% savings.

---

2. **Marketing -** Affordability & awareness

→ **Set up different payment options**
If at risk groups struggle to afford your product or service, have the SME think about different payment models they could offer customers. E.g. payment in interest-free instalments or pay-as-you-go model.

→ **Use inclusive communication in marketing materials**
Have the SME go through their own marketing materials (website, brand guidelines, social media pages, brand name, logo...) and identify exclusive statements and visuals. To learn more about eliminating specifically gender norms in marketing and communication, visit Ten Principles of Gender Responsive Communication for Development by UNDP (2018)

---

3. **Distribution -** Accessibility

→ **Use the same channels as your at risk consumer group**
Sell the products/services where your consumers are. To reach a specific consumer group, the SME may have to use an additional new channel. E.g. sell on social media marketplace, or set up a direct selling network.

Inclusion in the value chain

What you can do

Beyond its own workforce and beneficiary approach, you can support the SME in making the whole value chain they operate in more inclusive.

Start by collecting value chain data to understand the SME's current situation, then guide them in setting inclusion goals and KPIs for suppliers and business partners.

Activity

1. **Collect supply chain data**
   Regularly gather data to assess supplier diversity and identify areas for improvement. Use tools like the WEConnect International global supplier diversity & inclusion checklist.

2. **Identify inclusive partners**
   Encourage the SME to connect with businesses and organisations that share their inclusion goals. Collaborating with diverse partners fosters innovation and helps promote inclusion across the value chain.

Others have done it
Sweepsmart, a social enterprise building inclusive zero-waste sorting centers based in Bangalore, entered into partnerships with organisations that represent informal waste pickers. These partnerships resulted in Sweepsmart hiring waste pickers in the new sorting centers.

Inclusive programme design checklist

Inclusive Programme Execution

- ☐ I have taken measures to ensure a diverse pool of programme participants.

- ☐ I have evaluated and potentially amended my selection criteria to ensure equitable opportunities for all applicants.

- ☐ I have conducted a needs assessment to better understand the individual challenges and opportunities for each participant.

- ☐ I work with my programme participants on inclusivity within their own companies.

- ☐ I work with my programme participants on inclusivity within their beneficiary groups.

- ☐ I work with my programme participants on inclusivity within their value chains.

4.
Measuring inclusivity

How to define, measure and track whether you are being inclusive

Inclusive monitoring & evaluation (M&E)

Introduction to inclusive M&E

This section covers the what inclusive M&E is and how you can design an inclusive framework to define, monitor, evaluate and report on programme outcomes in a more inclusive manner. Throughout this section, you will explore practical strategies, tools, and examples to help you implement an inclusive approach to M&E in your programmes.

Learning Objectives

By the end of this section you will be able to:

Understand the importance of inclusive monitoring and evaluation.

Learn how to design inclusive M&E frameworks that integrate diverse stakeholder input.

Understand how to setup your inclusive outputs, outcomes and establish indicators that would reflect the experiences of diverse participants.

Learn how to monitor, evaluate and report in a more inclusive way.

Understand the difference between inclusive M&E practices and core M&E practices.

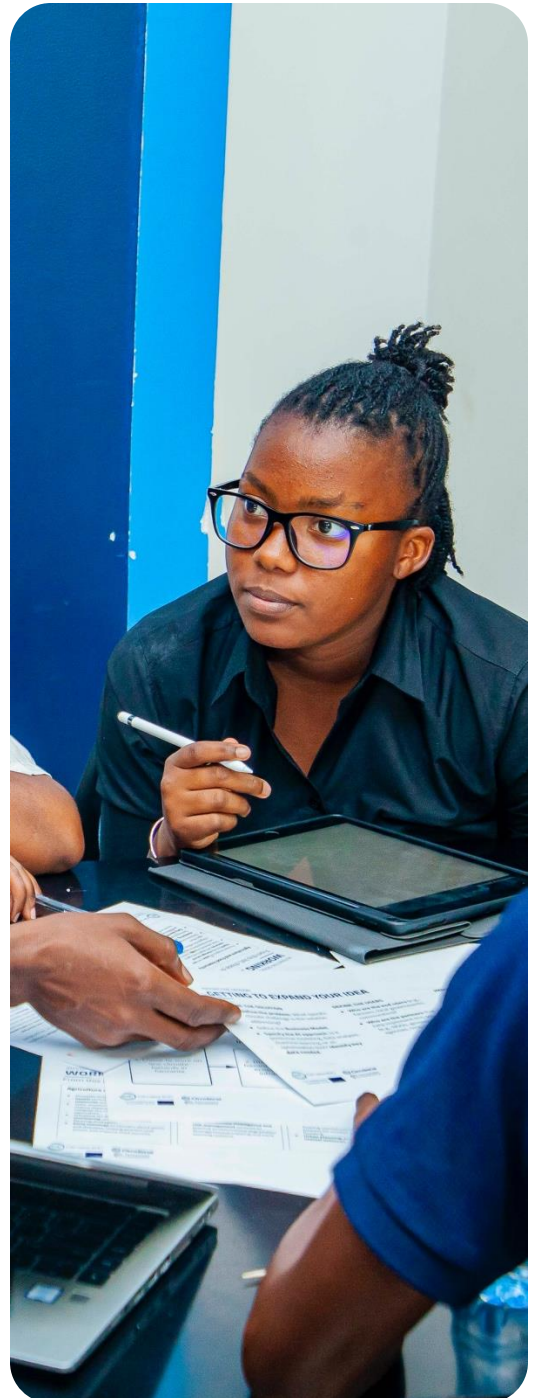# Inclusive monitoring & evaluation (M&E)

Introduction to Inclusive M&E

Why inclusive M&E

Core M&E focuses on KPIs set by organisations or donors, tracking visible progress and outcomes. However, it often overlooks how programmes impact individuals differently. People have varying levels of access to opportunities, so they experience programmes in unique ways. Inclusive M&E addresses this by creating metrics that capture the diverse experiences of participants, ensuring that all benefit equitably from the programme.

Inclusive monitoring and evaluation ensures the diverse experiences, needs, and outcomes of all participants, particularly those from at risk or underrepresented groups, are considered and measured within the programme.

"What good is equality if we cannot equate it to a better life."

Thea Bohol, Entrepreneurship programme Manager and Diversity, Equity, and Inclusion (DEI) Expert, Climate KIC

Inclusive M&E do's and don'ts

Below are a few best practices to ensure your monitoring and evaluation process is set up for success:

Do's	Don'ts
Ensure the diverse experiences and outcomes of all participants, especially at-risk groups, are considered.	Assume all participants are affected the same by programme interventions.
Involve beneficiaries in the evaluation process to capture their perspectives and insights.	Make decisions without input from the participants or communities being evaluated.
Use metrics and tools tailored to reflect the specific contexts and needs of different groups (gender, age, income level).	Use rigid, unchanging metrics that do not account for different participant's needs.
Consider how overlapping identities (e.g., gender, race, income, etc) affect participants' experiences.	Treat all participants as a single group without recognizing intersecting identities.
Give voice to at-risk groups and emphasizes qualitative insights to provide a more comprehensive evaluation.	Rely heavily on quantitative data, missing the nuanced understanding that qualitative insights can offer.
Capture inclusion concerns in the baseline and design the programme accordingly.	Identify inclusion concerns mid-late programme period.

Inclusive M&E do's and don'ts

Below are a few best practices to ensure your monitoring and evaluation process is set up for success:

Aspect	Non-inclusive M&E	Inclusive M&E
Focus on specific demographics	Applies generic metrics and goals, treating all participants as a homogeneous group. *E.g. Standard business support offered to all SMEs without considering the specific needs of women-led businesses.*	Tailored to a targeted group addressing unique challenges and needs. *E.g. Tailored microloans and training specifically for women-led SMEs.*
Customised goals and outputs	Goals and outputs are broader and assume equal access to resources and needs of all participants. Focus lies on general business support. *E.g. Outputs measured by overall loan disbursement across the cohort.*	Activities are designed to address specific barriers *E.g. Increase access to finance for 50 women-led SMEs through microloans; loan disbursement is disaggregated according to key demographics in the programme (E.g. gender, disability) .*
Outcome and impact focus	Outcomes and impacts are measured in general terms, potentially overlooking disparities. *E.g. Outcome: Increased revenues across cohort; Impact: Business growth as average over the full cohort (overlooking potential differences based on demographics).*	Outcomes and impacts are directly related to the empowerment and growth of the specific group. *E.g. Outcome: Increased revenue and participation of women-led SMEs; Impact: Business growth in all companies.*

Inclusive impact pathway

Inclusive impact pathway

This pathway guides you through each phase of a programme — from design to implementation and evaluation — to ensure that the diverse needs and experiences of all stakeholders are considered and addressed.

The inclusive impact pathway is more than just a conceptual framework; it provides a practical, step-by-step checklist that allows you to systematically assess and ensure that your M&E plan is truly inclusive. This approach guides you through each stage of the programme lifecycle — from design to implementation and evaluation — offering clear criteria and questions to evaluate the inclusivity of your M&E processes.

1. Design: Setting the framework

This is where you plan how you'll monitor and evaluate inclusivity and define metrics and indicators. Allocate budget at this stage for impact monitoring and evaluation.

2. Implementation:
Monitoring progress

This is when you collect data and track the project's progress. You monitor how different groups are benefiting and make adjustments.

3. **Evaluation:** Assessing impact

Here, you analyse the data to see if the project's outcomes were equitable. You assess whether all groups benefited as planned and use these insights to improve future projects.

Self-reflection

Before you jump into the detail of your M&E framework, let's take a second to reflect on where you currently stand:

Do I understand what inclusive M&E entails?

Why is it important to do inclusive M&E for this specific programme?

What are my expectations for the outcome of inclusive M&E? How would that improve the quality and impact of this programme?

What would happen if my M&E framework is not inclusive?

What challenges do I anticipate planning inclusive M&E?

How can I overcome these challenges?

For this exercise, you can include the whole programme team, making sure that everyone is aligned towards the same goals and has the same definition of what 'success' means
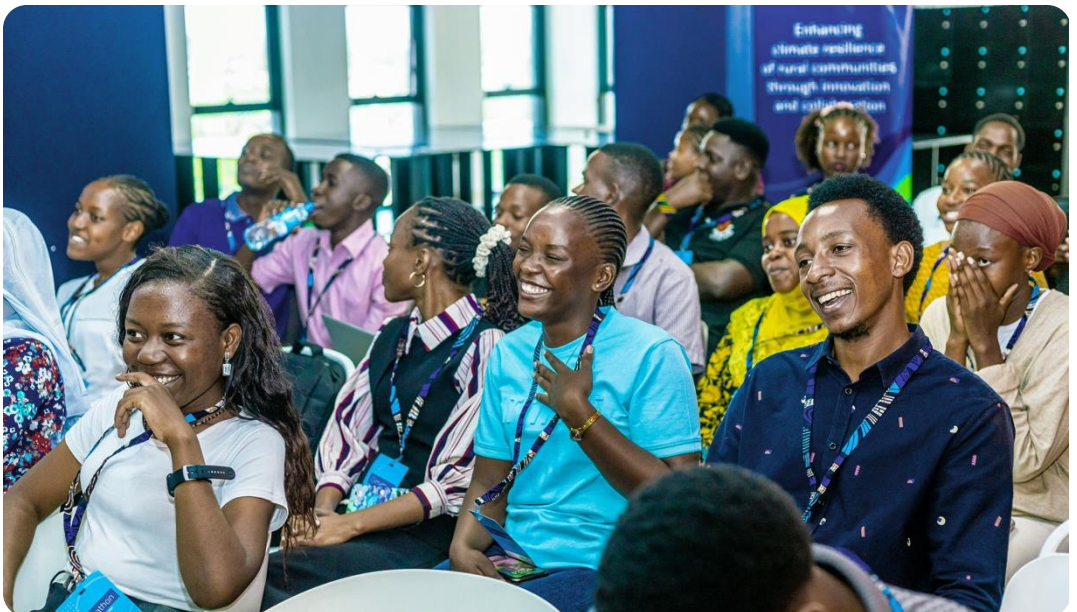
Inclusive M&E at the planning phase

The planning phase is your chance to design an equitable and inclusive M&E framework. To do this, you need to have a good understanding of who your target group is, and what impact you want to create.

Step 1

Identify your target group, their needs and challenges (refer to 'Inclusive programme planning' section for a more detailed explanation). Do not make assumptions but include them in this process. It is very important at this stage to collect baseline data on the current situation of the participants. One major challenge practitioners face at this stage budget constraint to conduct a needs assessment.

Step 2

Based on their needs, define the goal, outputs, outcomes, impacts, indicators, and measurement methods.

Inclusive M&E at the planning phase

Once you have a good understanding of your target group and their needs, the next step is to ensure that the outcomes of these activities are closely monitored and measured. To achieve this, it is essential to assign specific indicators to each activity, to make sure progress is tracked and nothing is overlooked. Below you can see a simplified version of a Theory of Change, a common tool to describe change, and some example indicators. Look at the example below for a project that has a goal to build climate resilience in low-income communities.

Term	Prompt	Example indicators
Output	*What specific activities directly support your program's goals? How will you track participation from diverse groups (e.g., gender, age, income level)? What measurable data points (numbers, percentages, or qualitative feedback) reflect the program's immediate success?*	Number and percentage of participants disaggregated by gender, age, and income level **Verification:** Participant registration forms, demographic surveys Number of customised training sessions addressing unique barriers for marginalized groups (e.g., childcare support or accessibility) **Verification:** Training agendas, participant feedback forms
Outcome	*What short- to medium-term changes in behavior, knowledge, or skills do you expect from participants? How will you measure improvements in participant capacity (e.g., increased skills, market access, confidence)?*	Percentage of participants who report increased knowledge of sustainable business practices **Verification:** Post-training surveys, focus group discussions Number and percentage of rural women entrepreneurs accessing new markets or securing partnerships. **Verification:** Market access records, business partnership agreements
Impact	*What long-term changes in participants' lives or communities reflect the success of your program? How will you measure whether the program addressed systemic barriers for at-risk groups?*	Percentage increase in revenue for women-led startups after one year of program participation **Verification:** Financial reports from supported businesses Demonstrable improvements in the socio-economic status of rural communities **Verification:** Baseline and endline surveys, community impact assessments

Inclusive M&E at the planning phase

Case study: Inclusive M&E for a circular economy entrepreneurship

Let's take the example of a social entrepreneurship programme that supports low-income women and youth in launching circular economy businesses. The programme focuses on three sectors: food waste recovery, textile upcycling, and plastic repurposing. The main challenge it aims to address is the lack of access to climate-resilient livelihoods in urban informal settlements. One of the programme's goals is *increasing green business readiness* among participants. Below are some example indicators they could track:

Term	Prompt	Example Indicators
Output	What specific activities directly support your programme's goals?	• Number of participants trained in circular economy models (e.g., reuse, repair, upcycling) • Number and percentage of trainees disaggregated by gender, age, and income level • Number of mentorship hours provided to participants **Verification**: Training logs, attendance records, demographic surveys
	How will you track participation from diverse groups?	• Participant demographics monitored and analysed per training cycle • Inclusion of accessibility or support measures (e.g., childcare stipends, translated materials) **Verification**: Inclusion checklists, feedback forms
Outcome	How will you measure improvements in participant capacity?	• % of participants gaining basic financial literacy, market understanding, and green skills **Verification**: Evaluation reports, mentor feedback
Impact	What long-term changes in participants' lives or communities reflect the success of your programme?	• Number of policy or partnership shifts in support of inclusive circular entrepreneurship • % of participants who report improved access to markets, networks, or capital compared to baseline **Verification**: Policy tracking, stakeholder interviews, before/after analysis

Inclusive M&E at the planning phase

A few tips

To ensure that M&E is truly inclusive, it's important to move beyond simply tracking representation metrics (such as the number or percentage of participants from a specific group). Instead, focus on creating a deeper understanding of the impact on those groups.

A key step in achieving this is to actively involve the target population in developing impact indicators. By engaging them directly in defining and validating the metrics, you ensure that the indicators reflect what truly matters to their needs and priorities, leading to more meaningful and relevant insights. Importantly, this engagement process should be designed to benefit participants as well, ensuring that the insights generated are shared in ways that are useful and valuable to their communities.

How to translate outcome or impact into KPIs?

Tip 1

Start with the impact you want to create, and understand what you would need to do (output) to achieve it in the short term and long-term (outcomes)

Tip 2

Start with a broad definition of the target group for whom outcome/impact being measured e.g. SMEs in the circular sector and define KPIs

Tip 3

The next part is to disaggregate the KPIs by at-risk groups. For instance, if business models were improved, what proportion of the SMEs belong to different at-risk communities among those that improved their business model? E.g. women led SMEs

Inclusive M&E at the planning phase
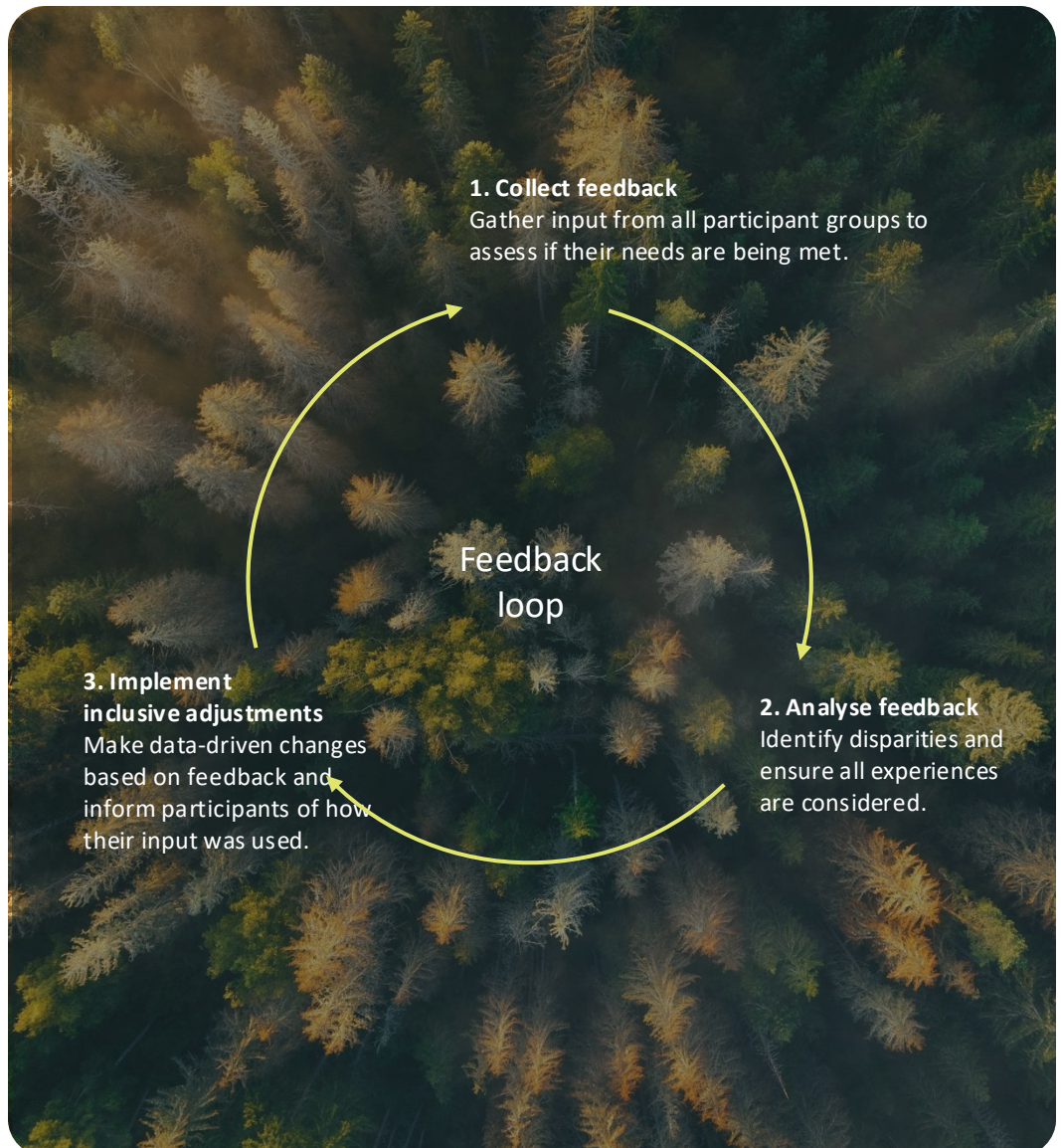
Planning Checklist

Below is a checklist that helps you identify whether you have addressed all key steps of Inclusive M&E at the programme planning phase.
The programme team in collaboration with the target group:

Planning checklist

Below is a checklist that helps you identify whether you have addressed all key steps of Inclusive M&E at the programme planning phase. **The programme team in collaboration with the target group:**

- ☐ Defines who the participants are and explores their unique needs.

- ☐ Collected baseline data on the current status of the target group.

- ☐ Shape project goals, activities, and structure.

- ☐ Create indicators that reflect progress on goals that matter to participants.

- ☐ Identified the right indicators to track the progress of your goal.

- ☐ Ensure methods are suitable for all participants, considering language, literacy, and accessibility needs.

- ☐ Allocate sufficient resources and time for inclusive engagement and M&E activities.

Inclusive monitoring

After developing inclusive metrics during the design phase, it's important to monitor them throughout the program to ensure inclusivity and address barriers.

1. Collect feedback
Gather input from all participant groups to assess if their needs are being met.

Feedback loop

2. Analyse feedback
Identify disparities and ensure all experiences are considered.

3. Implement inclusive adjustments
Make data-driven changes based on feedback and inform participants of how their input was used.

Inclusive monitoring

Below you find a list of key adaptations that you can do to your programme monitoring to make it more inclusive:

Core monitoring	Enhanced monitoring
Tracking of representation Number or percentage of women and men, youth planned to be included in the programme.	**Needs assessment** Understanding how specific needs and barriers will be addressed in the programme design and assign specific activities and allocate budget to measure change in these areas.
Tracking of participation Monitoring the number of participants from various demographic groups.	**Active engagement monitoring** Assessing the quality of participation and whether all groups are actively engaged and their voices are being heard.
Satisfaction surveys General satisfaction levels reported by participants.	**Ongoing feedback loops** Continuously gathering detailed feedback through interviews, focus groups, or regular check-ins to adjust the programme as needed.
Attendance rates Tracking the number of sessions or activities attended by different groups.	**Barriers to participation** Identifying and addressing obstacles that prevent full participation by different groups, such as timing, location, or cultural factors.

Inclusive evaluation

Inclusive programme evaluation enables a more comprehensive understanding of what works and for whom. This approach helps uncover insights from diverse stakeholders, leading to more adaptive and impactful programme improvements:

Core evaluation	Inclusive evaluation
Completion rates Percentage of participants who complete the programme, segmented by demographic groups.	**Outcome equity analysis** Assessing whether all demographic groups achieve similar outcomes and identifying factors that contribute to any disparities.
Quantitative impact assessment Using numbers to measure programme success.	**Qualitative impact assessment** Incorporating the experiences, challenges, and outcomes for all demographic groups, to understand the diverse experiences and impacts on participants from different backgrounds.
Post-programme satisfaction surveys Gathering feedback on overall satisfaction.	**Long-term impact evaluation** Assessing the sustained impact of the programme on different groups and whether it has addressed their initial needs and barriers effectively.
Completion rates Percentage of participants who complete the programme, segmented by demographic groups.	**Outcome equity analysis** Assessing whether all demographic groups achieve similar outcomes and identifying factors that contribute to any disparities.

Inclusive learning & reporting

The final step of the M&E process is programme reporting and learning. This is your opportunity to look at all the data and insights gathered throughout the programme to guide and redefine your strategy and approach. While everyone loves to report on wins, try to also include an honest and transparent reflection on what did not go (as well) as planned.

Aspect	Inclusive Reporting
Focus on stakeholders	Actively integrate the voices of at-risk and underrepresented groups. Feedback from all participant groups is sought and reflected in the learning and reporting process.
Data disaggregation	Disaggregate data by demographic factors (e.g., gender, age, ethnicity, disability) to reveal disparities and ensure that all groups' outcomes are reported.
Transparency	Transparently discuss both successes and areas for improvement, particularly in terms of inclusivity with the rest of the organisation for learning purposes.
Recommendations	Provide targeted, actionable recommendations based on disaggregated data to address disparities and improve future inclusivity.
Goal setting	Set yourself goals to improve on inclusivity misalignments uncovered during the MEL process and update your programme indicators accordingly.
Learning Loop	Take what worked well and any recommendations you have gathered and integrate them into your programme setup and strategy.

Inclusive learning & reporting

Case study: Inclusive learning & reporting

Let's take the example of an Entrepreneurship Support Organisation (ESO) that runs a programme to support green start-ups in rural communities, aiming to foster climate-friendly solutions. The programme provides funding, training, and market access for entrepreneurs

Between June and October 2024, the programme supported 120 rural entrepreneurs in green start-ups, with 40% women-led businesses and 20% youth under 30. While impactful, key inclusivity gaps remain: women's participation fell short of the 50% target due to caregiving responsibilities and inflexible scheduling, and only 5% of participants identified as having disabilities, highlighting accessibility barriers. Despite this, the programme facilitated 15 new partnerships, showcasing the potential of rural entrepreneurs to drive climate-friendly solutions. Feedback emphasised the need for childcare support, flexible training, and improved digital access for youth. Participants with disabilities recommended collaboration with accessibility organisations. These insights highlight the need for tailored adjustments to address diverse needs.

To close these gaps, the programme will aim to:

→ Increase women's participation to 50% and youth engagement to 30%, while ensuring accessible venues.

→ Update indicators that track participation by caregiving status, digital access, and disabilities.

→ Partner with women's and youth organisations for outreach, piloting childcare during sessions.

→ Implement hybrid training formats.

By addressing challenges, updating goals, and fostering inclusivity, the program seeks to ensure equitable participation and outcomes for all beneficiaries.

Ethical considerations on M&E

It's important to be aware of these ethical considerations ahead of engaging with participants and collecting data, ensuring that our approach respects their dignity, rights, and well-being throughout the entire process.

Informed consent

Always obtain informed consent from participants. This means they should fully understand the purpose of the evaluation, what their participation involves, potential risks, and their right to withdraw at any time without any consequences. Information should be communicated clearly and in a way that's understandable to each participant.

Cultural sensitivity

Respect the cultural norms, values, and languages of participants. M&E activities should be adapted to fit the cultural context and avoid imposing outside assumptions.

Respect and inclusivity

Ensure that participants are treated with respect and without discrimination.

Confidentiality and anonymity

Protect participants' personal information by ensuring confidentiality and, where possible, anonymity. This includes not sharing identifying information in reports or discussions unless permission is given.

Transparency

Be clear about the purpose and scope of the evaluation with all stake- holders. Sharing relevant findings with the participants and communities can be a way to show respect and give back to the community.

Inclusive programme M&E checklist

- [ ] I have designed an inclusive M&E frameworks that integrate diverse stakeholder input and has integrated feedback loops.

- [ ] Our data collection (surveys, interviews, focus groups) are accessible to accommodate different needs, and are culturally sensitive.

- [ ] Our M&E framework balances quantitative data (e.g. surveys, metrics) with qualitative insights (e.g. interviews, narratives) to get a full picture of participants' experiences.

- [ ] I have defined inclusive outputs, outcome and impact with corresponding disaggregated indicators to reflect the experiences of diverse participants.

- [ ] My monitoring process goes beyond tracking of participation, but also looks at the value that each participants receives from the programme.

- [ ] I am taking the learnings (positive and negative) from this programme, and am integrating them into the next iteration and/or future programme design processes.

Congratulations on making it to the end!

What's next after this?

Inclusion work is ever evolving and requires reflection and collective sensemaking to understand if the interventions across programme design, planning, execution and monitoring are working for your team and programme.

We'd love your feedback on this work. If you have any ideas, case studies or reflections on this piece of work, please reach out to inclusivity@climate-kic.org.

4. MEASURING INCLUSIVITY
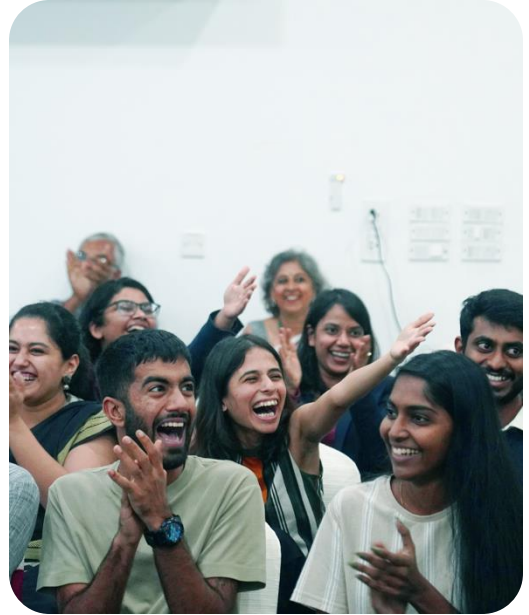
2X Criteria — 2X Challenge. (n.d.). 2X Challenge. https://www.2xchallenge.org/2xcriteria

Adaptation Scotland. (n.d.). *Stakeholder and power mapping template and workshop outline*. Retrieved from https://www.adaptationscotland.org.uk/how-adapt/tools-and-resources/stakeholder-and-power-mapping-template-workshop-outline

CB Insights: "The Top 20 Reasons Startups Fail" - CB Insights, 2019, retrieved at https://www.cbinsights.com/research/report/startup-failure-reasons-top/ .

Diane Arnos, Edward Kroll, Emma Jaromin, Hannah Daly, and Elsa Falkenburger (2021): Tools and Resources for Project Based Community Advisory Boards, Retrieved at: https://www.urban.org/sites/default/files/publication/104938/tools-and-resources-for-project-based-community-advisory-boards_0.pdf

Design in Tech. (2019). *Design in Tech Report 2019: Section 6 - Addressing imbalance*. Retrieved from https://designintech.report/2019/03/11/%F0%9F%93%B1design-in-tech-report-2019-section-6-addressing-imbalance/

GlobalChange.gov. (2016). *Populations of concern*. Retrieved from https://health2016.globalchange.gov/populations-concern

Development Alternatives (n.d.) *Community Listening Toolkit,* Retrieved from https://drive.google.com/file/d/1htV9OLkkgQDOtUuRGIi0ElftOLdsiSEW/view

Down Syndrome Queensland. (2019, October 29). What is inclusion ? [Video]. YouTube. https://www.youtube.com/watch?v=3VMz06iVzqs

King's Business School. (2023, March 16). Why Inclusive Innovation Can Change the World [Video]. YouTube. https://www.youtube.com/watch?v=LdfacIOCLHA

ANNEX

Gellatly, A.G., Meyer, M.M., & Gagné, M., 2017. Participation in decision-making and job commitment: A meta-analytic review of research. Journal of Applied Psychology, 102(12), pp.1360-1380, retrieved at https://nibmehub.com/opac-service/pdf/read/The%20Oxford%20Handbook%20of%20_%20work%20engagement-%20motivation-%20and%20self-determination%20theory.pdf

Johnson, Paul R., & Rivera, Luz M. (2018): Impact of Diversity in Workforce Education: Adult Learners and programme Effectiveness, retrieved at https://www.researchgate.net/publication/362510061_The_Impact_of_Workforce_Diversity_on_organisational_Performance_A_Revie

Lorenzo, R., Voigt, N., Tsusaka, M., Krentz, M., & Abouzahr, K., 2018. Diversity and innovation: A business case for why inclusive teams are smarter and more creative. Boston Consulting Group (BCG) Report, retrieved at https://www.bcg.com/publications/2018/how-diverse-leadership-teams-boost-innovation

Orestes R Betancourt Ponce de León: 5 Historic Examples of Foreign Aid Efforts Gone Wrong

Peter Dicampo: Failed Aid

Taylor, Edward W., & Cranton, Patricia (2016): Culturally Relevant Pedagogy in Adult Education: Perspectives from Diverse Educators, retrieved at https://www.researchgate.net/publication/269503505_A_theory_in_progress_Issues_in_transformative_learning_theory

The Wright Center. The Wheel of Social Identity (n.d.). Retrieved from https://thewrightcenter.org/facing-ourselves-and-growing-within/