Northern Power Inclusion Matters Practitioner Toolkit

The Northern Power Inclusion Matters project is funded by the Engineering and Physical Sciences Research Council (EPSRC). Helping shape an actively inclusive culture in the Engineering and Physical Sciences (EPS) community in the North of England, it supports, drives and sustains greater equality for all, including people of different genders, ethnicity, sexual orientation, and disabilities.

OSP/05/21/021

The Northern Power Inclusion Matters Practitioner Toolkit can be found at https://doi.org/10.15128/r1gf06g267h.

An interactive version of the Toolkit can be found at https://northernpowerinclusiontoolkit.org.

Introduction

Northern Power: 'Making Engineering and Physical Sciences Research a Domain for All in the North of England' was a 2 year, EPSRC project funded through the Inclusion Matters call.

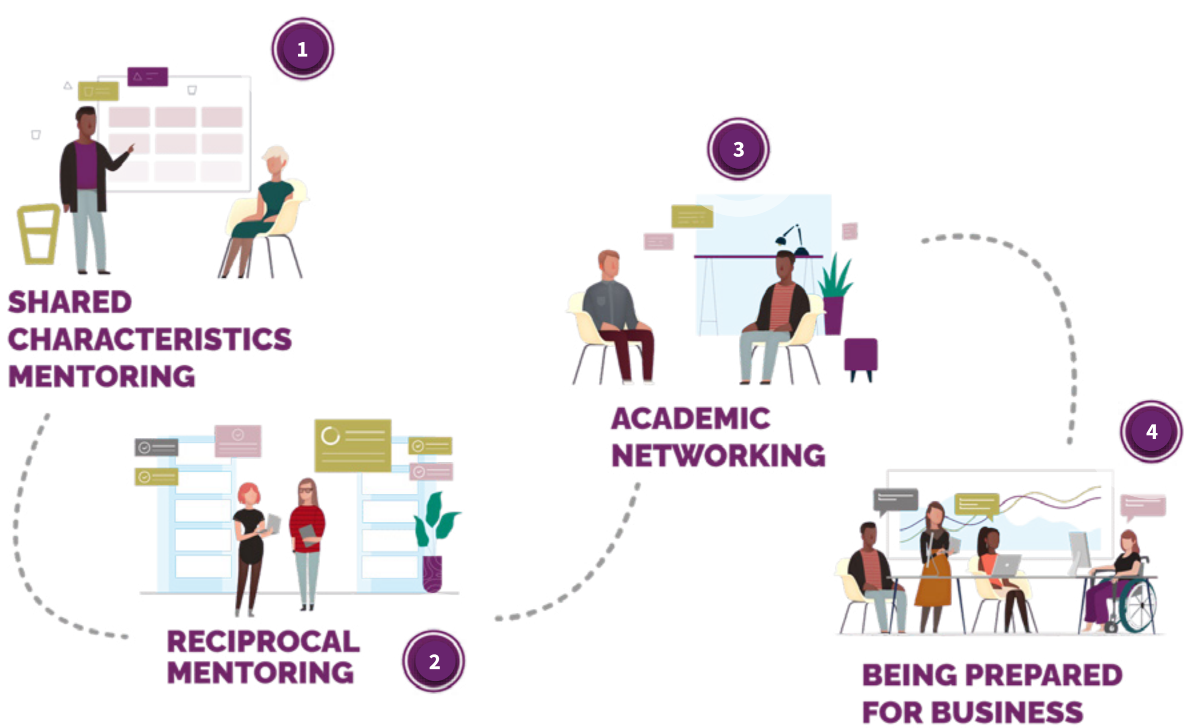
The overarching aim of the Northern Power Inclusion Matters project is:

> 'To shape an actively inclusive culture in the EPS community (academic and beyond) in the North of England that supports, drives and sustains greater equality for all, including traditionally under represented groups (e.g., women, disabled people, LGBT+, and Black, Asian and minority ethnic (BAME) researchers)'

When developing the Northern Power Inclusion Matters bid, the project team **identified 7 critical challenges:**

1. Lack of role models
2. A leaky pipeline
3. Inequity in opportunities
4. Lack of synergy in initiatives
5. Lack of understanding of barriers by some senior leaders
6. Poor data
7. Poor analysis of progress

These are the activities we developed to address these critical challenges.



Shared Characteristics Mentoring

Key Features

Early Career participants mentored by more senior staff who have similar identities, attributes, experiences or career interests.

Intended to support

➜ Retention,
➜ personal and professional development,
➜ progression,
➜ visibility,
➜ academic networks,
➜ knowledge sharing
➜ and best practise.

Developed by Leeds University

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➜ academic networks,
➜ knowledge sharing,
➜ and best practise.

Developed by Durham University

Academic Networking

Key Features

Develop and implement a networking intervention to support tailored networking opportunities for Early Career academics.

Intended to support

Address networking challenges for Early Career participants in HEIs. To support

➜ career development,

➜ aid career progression,

➜ and address limited

➜ and unequal access to networking opportunities.

Developed by Newcastle University

Being Prepared for Business

Key Features

Developing a shared understanding of good EDI practice between industry and academia.

Intended to support

Underrepresented groups working across boundaries in collaborative projects with industry to develop their expertise and careers.

Developed by University of Northumbria

One of the project's key objectives was to create a longer-term impact. This included:

- Establishment of best practice within the consortium partners
- Dissemination of findings to the wider Engineering and Physical Sciences community and beyond
- Changes to practices and policies within the consortium and beyond

This evidence-informed toolkit is designed to assist professional practitioners in implementing similar activities and adapting them for use within their own settings.

The toolkit guides you step by step through the activities. Within each section you will find supporting documents, accessibility and inclusion guidance and tips on how to run the activities.

Things you need to do, and think about before you start

Before starting work on implementing any of the activities in this toolkit, there are a number of important considerations:

Handling Personal Data Responsibly

Organisations have a responsibility under the General Data Protection Regulation (GDPR) to ensure people know why their data is being collected, how it will be used, who will access the data and how long it will be stored for. Only the data that is necessary to carry out a particular activity should be collected and nothing more.

Data Collection and GDPR
(General Data Protection Regulation)

Participant Information and Consent

It is important that people interested in taking part in any of the activities understand what is involved in taking part before they sign up and provide any personal information. Participants should be provided with:

- [ ] A **Participant Information Sheet –** this contains the details about the activity.

☐ **A Privacy Notice –** this contains details about what data is required to run the activity, how data will be collected, where the data will be stored and for how long, who it will be shared with and for what purpose. It also tells Participants how they can withdraw consent if they decide to, and request copies of their data be destroyed.

Participants must give consent to their data being used in the manner described. You must retain a record of their consent.

Participants can give consent which is:

- **Paper based** (by filling out and signing a form)
- **Digital** (through an online questionnaire sign up)

Data Sharing between Organisations

If it's necessary to share Participant information with other organisations (for cross-organisational activities), a data sharing agreement may be necessary. This will cover:

- how data will be transferred between organisations
- how data will be stored at each organisation

- who should have access to it and for what purpose
- who is responsible for disposal of data held in each location

Consider

- what text needs to be included in the privacy notice to inform participants their data will be shared with external organisations
- who needs to be involved for setting up and signing a data sharing agreement

Registering Participants and Collecting Data

In the Northern Power Inclusion Matters Project, participants for all activities signed up through a single questionnaire. We used JISC Online Survey (formerly Bristol Online Survey), and offered a paper questionnaire as an alternative for accessibility reasons. There are many other survey software providers on the market. The functionality requirements are open text responses, grids or scales, appropriate security and data storage.

Data can be collected:

- By online form
- Hard copy, paper form questionnaire
- By interview, in person or over telephone or online meeting

The questionnaire should only collect as much information as is necessary to enable you to:

- Contact participants;
- Carry out the activity;
- Evaluate the effectiveness of the activity if you want to do this.

Useful Advice

Consider the Participant experience and streamline your registration process. Build sign up questions and consent into the questionnaire. If evaluating the activity include evaluation questions that allow you to measure success at the end of the activity. If registering Participants for a mentoring activity can you include matching questions at this stage too?

Leave the registration questionnaire open for enough time to ensure people have the opportunity to sign up. Consider potential working patterns, workloads, leave and holidays. If registration is online, if possible set the questionnaire so it can be saved and returned to. Ensure software is screen reader accessible and paper copies are available as an alternative.

If your activity is open to people outside your organisation, make sure online registration links are accessible to people outside your organisation and not for example, located in a staff-only intranet location.

Document Templates

DOC **Participant Information Sheet EXAMPLE.docx**
36.2 KB

DOC **Privacy Notice EXAMPLE.docx**
30.9 KB

Communications

A communications plan should be drawn up to identify:

- What are the key benefits for participants
- What is the 'Call to Action' and where are you directing people to sign up
- Stakeholders – who should this message reach (potential participants, line managers, staff networks)
- What channels you will use to get your message out (events, emails, flyers, meeting presentations and sessions, social media etc)

Useful Advice

For cross institutional implementation we suggest you work with your contacts in the partner organisations to ensure the communications get to the intended audience.

Within the communications message include key benefits, call to action (with hyperlinks to the sign-up method) and a request to pass on to anyone else who may be interested.

Keep the communication simple and action orientated with the target audience in mind.

Monitor the effectiveness of the different approaches and adjust to increase participant interest and registration.

Evaluation

The aim of evaluation is to critically examine a programme to understand how effective it has been in meeting its aims and to examine what has worked well, or could be improved within its implementation.

We recommend four key considerations within the development of a programme to underpin the design of an effective evaluation. The programme should provide clear information on:

1. The **impact** the programme is aiming to achieve. The intended impact should be described as SMART aims (specific, measurable, achievable, realistic, timely).
2. The **outcomes** that need to be achieved to create this impact. The outcomes should also be SMART (specific, measurable, achievable, realistic, timely).
3. The **assumptions** that are being made as to why the programme and its component activities will lead to the proposed outcomes and impact.
4. Any **contextual factors** that are important considerations for the implementation of the programme.

The **impact evaluation** should then be designed to collect data that can reliably measure whether the specific outcomes and impact have been achieved. Impact data are generally quantitative measures.

In addition, **implementation and process evaluation** should be conducted to support understanding the delivery of the programme around several key areas: the extent to which the programme and activities were implemented as planned; how much of the programme and activities were delivered (and to what extent participants took part in them); how well the programme and activities were delivered (quality of delivery); the breadth of participation; to what extent participants engaged with the programme and activities, and the participants' perception of the programme; how the programme and activities were different to existing programmes; and whether and how the programme had to be adapted during delivery. Both quantitative and qualitative data are usually collected in this part of the evaluation.

For successful evaluation, it is recommended that the evaluation researchers work closely with the developers of the programme in order to reduce additional documentation for participants (e.g. providing information about the evaluation and collecting agreement to participate in the evaluation when participants sign up to the programme). It is also important to carefully balance the desire for detailed evaluation data with the burden placed on participants to provide additional information. Wherever possible, it is useful to consider where existing data being collected as part of the programme could be included as part of the evaluation (with permission from participants).

Shared Characteristics and/or Interests Mentoring

About Shared Characteristics and/or Interests Mentoring

Within the Northern Power Inclusion Matters project, we defined Shared Characteristics and/or Interests Mentoring as:

Early Career Participants (mentees) were matched with Established participants (mentors) who were more advanced in their careers and at a more senior level. The activity aimed to:

- Present cross-institutional networking and mentoring opportunities for people from under-represented groups in engineering and Physical Sciences.

- Give participants a mutual learning experience where mentees could gain insight and support from mentors and in turn, mentors could learn and share knowledge and best practice.

What problems were we trying to solve?

This activity was intended to address the lack of diverse role models and inequity in opportunities for early career people from under-represented groups.

What were we aiming to achieve?

Our aim was that Shared Characteristics and/or Interests Mentoring would provide a cross-institutional, structured programme to provide mentees with access to role models with similar characteristics and give them exposure to more opportunities through their increased networks. This would contribute to a wider retention and development strategy designed to retain and develop a more diverse group of people in EPS.

What did we do?

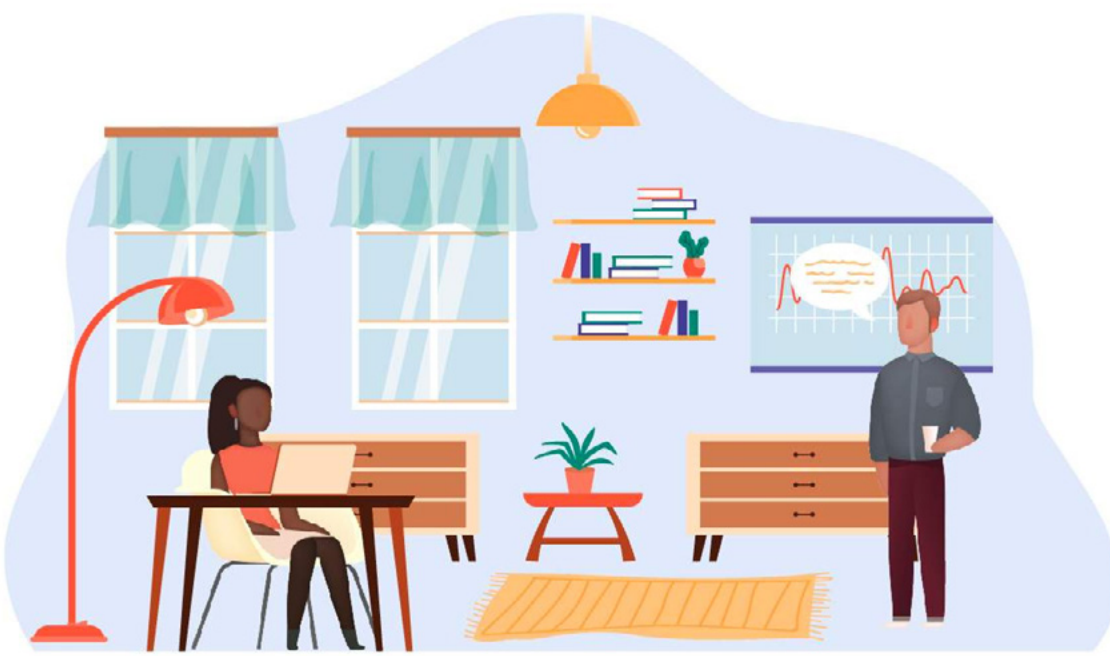
Participants completed an online matching questionnaire and undertook training prior to starting the mentoring sessions. The training was designed to support participants in gaining the maximum benefit from the mentoring sessions.

Participants came from organisations within the consortium and could be paired with someone within their own organisation or from elsewhere. Because there was a relatively low number of people from under-represented groups in EPS in each organisation, the cross-institutional approach allowed us to work with a more extensive pool of people and increase opportunities for participants to be paired with someone who closely matched their requirements around what they wanted to gain from the activity.

What were the anticipated Key Benefits?

FOR MENTEES	FOR MENTORS

- Career development
- Research advice
- Opportunities to learn how to gain collaborative funding
- Strengthen academic networks
- Opportunities to learn how others from similar underrepresented groups have navigated academia
- Opportunity to contribute to cultural change within the organisation



FOR MENTEES	FOR MENTORS

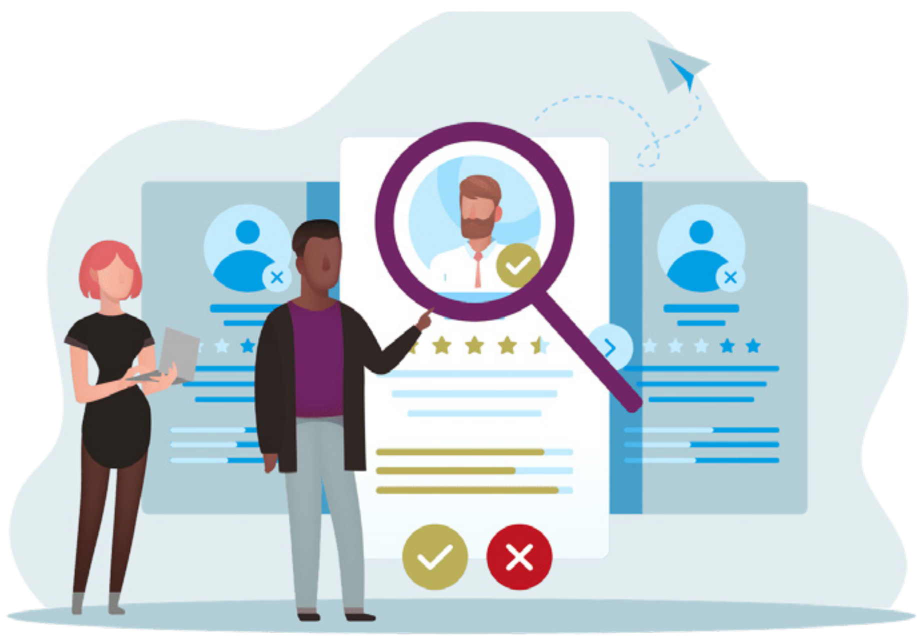
- Acting as a role model and developing your Citizenship role
- Kudos and increased professional standing
- Sharing excellence and good practice
- Passing on valuable experiences and knowledge
- Opportunities to learn about the challenges and barriers early-career researchers from under-represented groups encounter
- Leaving a legacy

How to Implement Shared Characteristics and/or Interests Mentoring

1

Design Phase

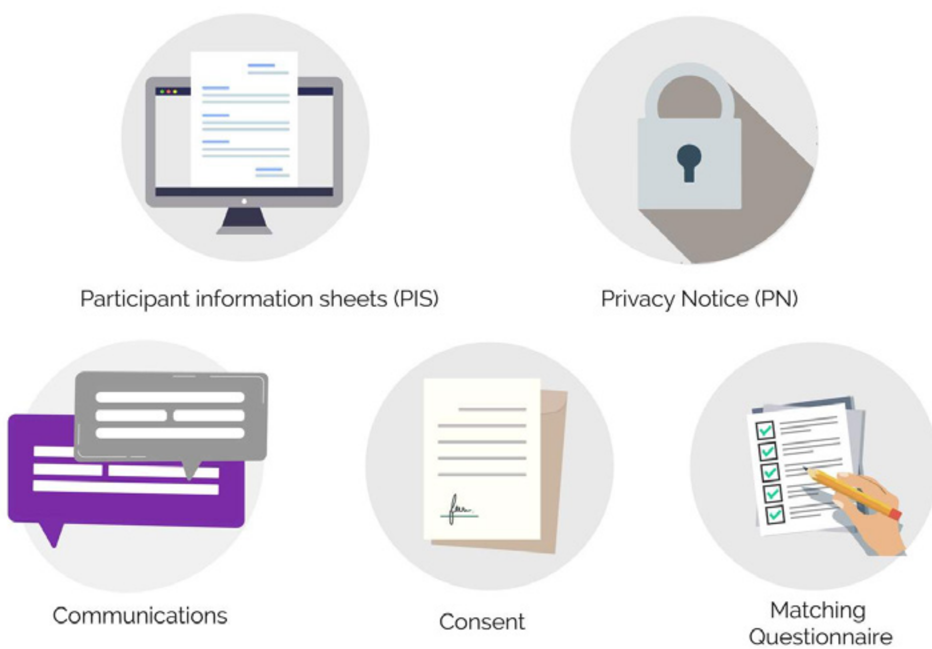
In designing your Shared Characteristics and/or Interests Mentoring Programme you will need to:



Define participants
What are the criteria to be in scope as a Mentee or Mentor

Design your Shared Characteristics Mentoring activity to include:

Produce the documents



Matching Participants

Manual or Automated?

Participants can be matched manually, or there are mentoring software products commercially available which carry out algorithm-based matching. We chose automated matching and used SUMAC® to match participants in the activity. Time was sometimes needed to re-match participants where proposed matching didn't work out.

Participants completed a detailed questionnaire. Matching questions focussed on:

1. Key areas of support needed and on offer
2. Personal aspects of support needed and on offer
3. Shared Characteristics
4. Shared Interests

Document Templates

Matching Questions - SCM.docx
36.2 KB

Useful Advice

Automated matching does have limitations. In complex EDI related matching preferences we found it useful to check the matches.

Some automated systems allow for provisional matching but this will increase administration for all parties.

Training

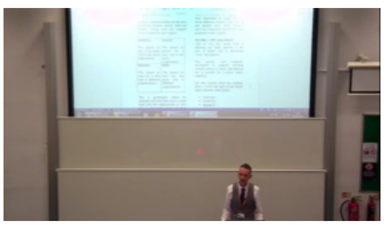
An Online Mentoring Course was produced, along with a Mentoring Handbook and links to other Mentoring Resources.

The training was intended to equip all participants with practical skills to enable a supportive and effective mentoring relationship.

Mentoring - what is it?
Here we define mentoring and question what it is and what it is not.

Mentoring Skills 1 070819
This session addresses core skills around listening and questioning.

Mentoring Skills 2 070819
This session addresses issues around non-verbal communication, affirmation and reframing and silence.



Tools and Summing up 2_080819
Summing up and some additional tools to support career development, work/life balance, confidence building and identity related issues.

Mentoring Attributes 1_080819

Mentee attributes 3 070819
In this session we will address the issue of honesty for both mentor and mentee: in what they can and can't do, will and won't do; On where they are and where they want to be. Anything else is a waste of time.

Mentee attributes 2 070819
This session will focus on developing a positive mental attitude and what this might mean for gaining and understanding of our own personalities, using DISC psychometrics as developed through Dr. William Marston, and developing a Growth mindset as identified in the work of Prof. Carol Dweck.

Mentee Attributes 4_070819

Rapport 1 070819
We will now look at building rapport, covering the aspects of appearance, find common ground/shared experience, showing an interest, and showing empathy. We will touch on unconscious biases and developing curiousity. To do this we need to disrupt our current thinking and the way to do that is by asking different questions.

Rapport 2 070819
In this session we will look at mirroring and matching, and further consider communication.

Tools and summing up 1_080819
Summation and references to the Mentoring Guide/Handbook

Key themes from the training included:

- What is Mentoring?
- Core Mentoring Skills
- Listening, questioning and non-verbal communication
- Mentee attributes
- Mindset
- Building Rapport
- Unconscious Bias

Document Templates

PDF **Mentoring Handbook - Shared Characteristics and Interests Mentoring.pdf**
805.6 KB

DOC **Refining your EQ - Shared Characteristics and Interests Mentoring.docx**
20 KB

DOC **Self-assessment Communications skills - Shared Characteristics and Interests Mentoring.docx**
18.7 KB

DOC

Self-assessment Curiosity - Shared Characteristics and Interests Mentoring.docx
19.2 KB

DOC

Self-assessment Mentee Attributes - Shared Characteristics and Interests Mentoring.doc
57.5 KB

DOC

Self-assessment Mentoring Skills - Shared Characteristics and Interests Mentoring.doc
58 KB

DOC

Self-assessment Rapport - Shared Characteristics and Interests Mentoring.doc
57 KB

PDF

Taxonomy - Shared Characteristics and Interests Mentoring.pdf
410.6 KB

DOC

Urgent Important Matrix - Shared Characteristics and Interests Mentoring.docx
19.2 KB

Useful Advice

Provide hybrid training (on-line and face to face) and record training session to help with accessibility and give the participants a choice over which mode of delivery would work for them.

Provide training sessions on different days and times to provide flexibility.

Provide an opportunity for feedback, and a point of contact for queries after the event.

4

Mentoring Meetings

Within the activity we suggested a minimum of four meetings, with 4-6 weeks between each meeting. 4 months was the minimum recommended activity period, with potential to extend subject to the agreement of both parties.

After the fourth meeting pairs were contacted to advise the minimum term had been met and offer the option to continue.

5

Communicating with Participants

We found regular communication was important to mentors and mentees. We produced an extensive Communication Plan. This included:

Welcome letter sent by email with a link to sign up onto SUMAC

Including:

- information on the process
- and what will happen throughout the activity
- a point of contact for questions

Welcome email

Including:

- how to change password
- data they submitted on their registration
- confirmation that we will be in touch once a match has been made and
- a point of contact for questions

Confirmation of matching

Including:

- Instructions for mentee to contact with mentor to set up the first meeting
- Information on virtual meetings with links to platforms such as Skype/Zoom/MS Teams and how to use guides
- Information on face to face meetings regarding travel expenses provided
- General activity information (minimum number of meetings, setting meeting dates)
- Requirements around advising the activity leads of meeting dates and what to do if things don't work out
- What to expect next – frequency of contact from the activity lead, requests for updates on progress

Useful Advice

Maintain contact – offer assistance in resolving any issues and offer re-matching if a pairing is not working out.

If a match is not found, keep participants informed with regular updates and if possible signpost to alternative development activities.

Tracking Activity

It is advisable to track the frequency of meetings between participants and act as a point of contact in the case of no-shows, or where participants were unable to contact one another.

It was important to the Northern Power Inclusion Matters project to do this due to the research element of the project. We created a Tracker which included:

- Matching complete
- Who the participant was paired with
- Date of communications sent
- Date of first mentoring session
- Number of meetings completed (with dates)
- Date of final email sent

Accessibility and Inclusion

When discussing when and where to meet with your mentor, always be considerate of different levels of comfortability with places and environments. For example, some people may prefer to meet outside of the work-setting, some may prefer strictly work-settings, or find it easier to engage online.

For comprehensive accessibility guidance on all for this activity, please go to the Accessibility and Inclusion section of the toolkit.

Reciprocal Mentoring

About Reciprocal Mentoring

Within the Northern Power Inclusion Matters project we defined Reciprocal Mentoring as:

What problems were we trying to solve?

A key challenge to shaping an actively inclusive culture in Engineering and Physical Sciences ("EPS") was identified as the lack of diverse role models in senior leadership teams.

Our aim was that the activity would directly address this lack of diversity in leadership teams by assisting in succession planning as part of a wider retention and development strategy designed to retain and promote a diverse group of people.

Specifically, the Northern Power Inclusion Matters Reciprocal Mentoring programme was designed to:

- Provide senior leaders with a clearer understanding and awareness of the barriers and challenges facing under-represented groups within Engineering and Physical Sciences ("EPS"), and to use this knowledge to create a more inclusive organisation;

- Provide development opportunities to people from under-represented groups, and give them exposure to people and processes at a senior level to increase their understanding of leadership roles. This was intended to enable them to visualise themselves in those roles, and gain insight on how to progress and develop to become future leaders.

Participants were encouraged to put aside the traditional junior/senior power dynamic and work together equally, with each bringing knowledge and insight of equal value.

What were we aiming to achieve?

The activity aimed to create change in three main areas:

- **Organisational**
  (a reproducible model to enhance diversity and inclusivity)

- **Early career stage participants**
  (enhancing interpersonal competencies around professionalism and employability)

- **Senior leader participants**
  (facilitating behaviour transformation to support cultural and environmental change)

What did we do?

We matched Early Career Participants with Senior Leader participants, each person took on the role of mentor and mentee to establish a collaborative learning relationship.

Participants completed a matching questionnaire and underwent bespoke training prior to starting the mentoring sessions. They came from organisations within the consortium and were able to specify if they preferred to be paired with someone within their own organisation or from elsewhere. Given the relatively low number of people from under-represented groups in EPS in each organisation, the cross-institutional approach allowed us to work with a larger pool of people, increasing the opportunity for participants to be paired with someone who closely matched their requirements.

One of the benefits of cross-institutional mentoring was that it gave participants the ability to talk more freely about their experiences with someone outside their own organisation.

The sessions acted as a platform for Early Career participants to share their experiences as someone from an under-represented group within EPS, to increase the knowledge and understanding for those who are able to influence change at an institutional level.

What were the anticipated Key Benefits?

FOR EARLY CAREER PARTICIPANTS	FOR SENIOR LEADERS	FOR THE ORGANISATION

- Career development advice
- Access to research advice
- Exposure to decision makers and decision making
- Increased understanding of leadership roles and career progression
- Increased confidence and motivation

What were the anticipated Key Benefits?

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- Increased understanding of leadership roles and career progression
- Increased confidence and motivation

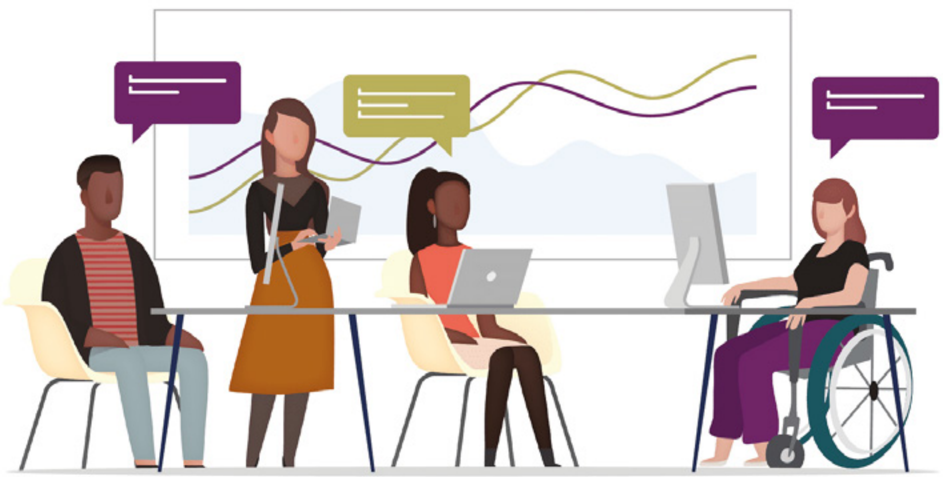
FOR EARLY CAREER PARTICIPANTS	FOR SENIOR LEADERS	FOR THE ORGANISATION

- Personal development
- Opportunities to learn about the challenges and barriers early career people from under-represented groups encounter
- Potential to use this learning to effect change within their organisation
- Actively support the progression of people from under-represented groups
- Ability to share excellence and good practice, and 'give back'

FOR EARLY CAREER PARTICIPANTS	FOR SENIOR LEADERS	FOR THE ORGANISATION

Anticipated outcomes for Organisations involved in the activity:

- More inclusive workplace, with clear role models and allies at a senior level
- Greater retention and promotion of staff in under-represented groups
- More diverse leadership teams, supporting succession planning
- Delivery against actions relevant to sector-specific chartermarks such as Athena Swan and Race Equality Charter in Higher Education and awards such as Investors in Diversity and other business focussed diversity accreditations



How to Implement Reciprocal Mentoring

1

Design Phase

In designing your Reciprocal Mentoring Programme you should:

Define participants
What are the criteria to be in scope as either an Early Career, or a Senior Leader participant

Design your Reciprocal Mentoring activity, include:

- how you will publicise the programme
- how you will register participants
- what are the matching questions
- length of the programme
- will matching be automated using a software provider or manual
- participant training
- how long should each session be
- how many sessions during the timespan
- what to do if things don't work out
- evaluating impact (on the participants and the organisations involved)
- tracking mentoring sessions
- opportunities for gathering feedback, reflecting and refining the programme

Produce the documents

- Participant information sheets (PIS)
- Privacy Notice (PN)
- Communications
- Consent
- Matching Questionnaire

Matching Participants

Due to the small cohort and seniority of Senior Leader participants, we elected to match manually using a small panel of people who allocated pairs. This allowed us to implement a personalised approach. Data was gathered through an online questionnaire for Early Career participants, and through in-person interviews with Senior Leaders. This was intended to instil confidence in Senior Leader participants who could discuss any questions they may have with the interviewer, develop a deeper understanding of the process, and establish a point of contact giving assurance of support throughout the activity.

Manual or Automated?

As well as matching Participants manually, there are mentoring software products commercially available, which carry out algorithm-based matching. They provide participants with a list of suggested matches so they are able to self-select a mentor from the people they are matched with. Automated matching software is useful when dealing with large numbers of participants.

Due to our decision to utilise manual matching, we do not offer any guidance around the use of automated matching for Reciprocal Mentoring.

Useful Advice

Use a set panel of people to carry out the matching for consistency.

Ensure the panel are trained in, or aware of the different types of unconscious bias.

Don't aim for the perfect match only; if a close match isn't available, ask participants to review choices, rather than miss out on taking part in the activity.

Document Templates

PDF

Process - Reciprocal Mentoring.pdf
397.8 KB

DOC

Overview of Reciprocal Mentoring.docx
46.6 KB

XLS

Matching Questions - Reciprocal Mentoring.xlsx
14.9 KB

Training

Participants attended live training sessions delivered by a coaching expert to ensure they got the most from their mentoring sessions. The training was intended to equip all participants with practical skills to enable a supportive, safe and engaging reciprocal mentoring relationship. The trainer predominantly focused on the concept of the 'Thinking Environment' (Nancy Kline) and explored a multitude of themes.

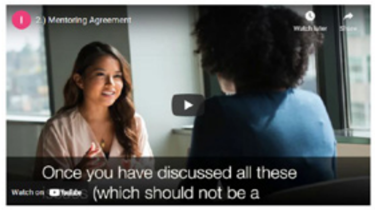
Key themes from the training included:

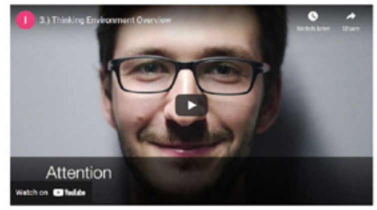
- What is Mentoring?
- Core Mentoring Skills
- Listening, questioning and non-verbal communication
- Mentee attributes
- Mindset
- Building Rapport
- Unconscious Bias

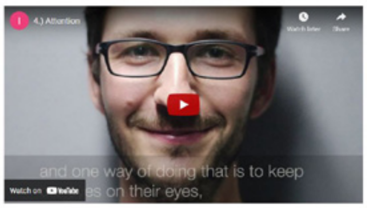
Training was delivered in two distinct participant groups; senior leaders and ECRs. Having separate training groups enabled participants to learn with people in their own career stage, and communicate freely and openly. The content was adapted to the career stage of the participants, for example taking into account any previous coaching senior leaders may have already had.

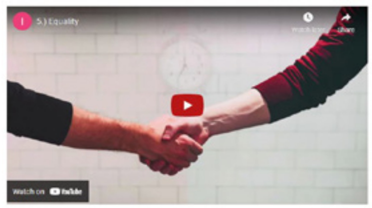
The live training sessions were designed for in person delivery, but were delivered online, using video-conferencing software, with breakout rooms for pair work. The training sessions were around 90 minutes each.

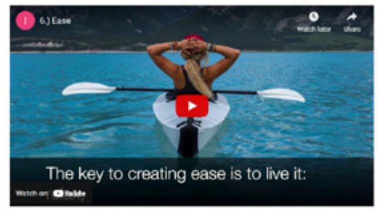
The key learning points were summarised into a mentoring guide and a suite of learning videos were produced.

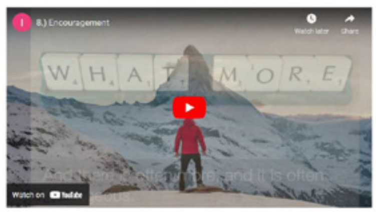


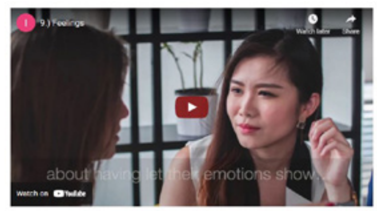


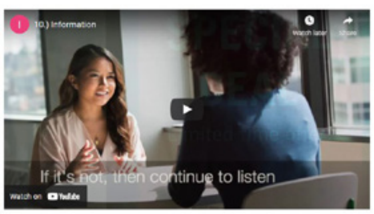


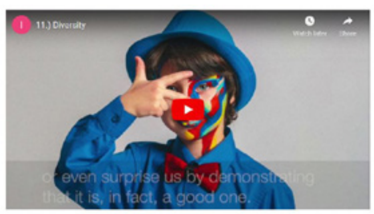


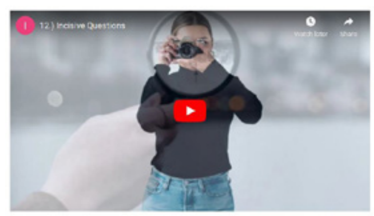


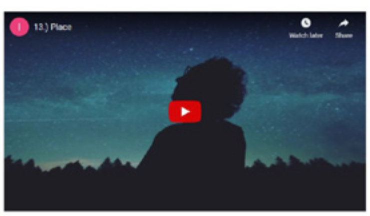












Useful Advice

Provide a flexible approach to training, provide sessions over multiple days, at different times and allow participants to choose what works for them.

Provide handouts, resources and access to refresher material such as video clips.

Provide an opportunity for feedback, and a point of contact for queries after the event.

The Meetings

Contacting Participants

Participants should be contacted to:

- Confirm who they are matched with
- Advise them of what to do next
- Share documents and links to training resources
- Provide a point of contact for any issues

Participants can then contact one another to arrange a first meeting, then subsequent meetings after that if all is going well.

Document Templates

DOC **Email to Participants confirming matching and process - Reciprocal Mentoring.docx**
38.8 KB

XLS **Participant Tracker - Reciprocal Mentoring.xlsx**
12.6 KB

Tracking

It is advisable to create a tracker; use this to check training and other steps have been complete and also to track the frequency of meetings between participants. It was important to the Northern Power Inclusion Matters project to do this due to the research element of the project. Its also useful in the case of no-shows, or where participants were unable to contact one another and intervention is needed. Our tracker logged the following information:

- Date Matching completed
- Who the participant was paired with (pairs were given a unique ID)
- Date Training completed
- Date the mentoring sessions started
- Date the mentoring sessions were due to end
- Date the Meetings took place

Accessibility and Inclusion

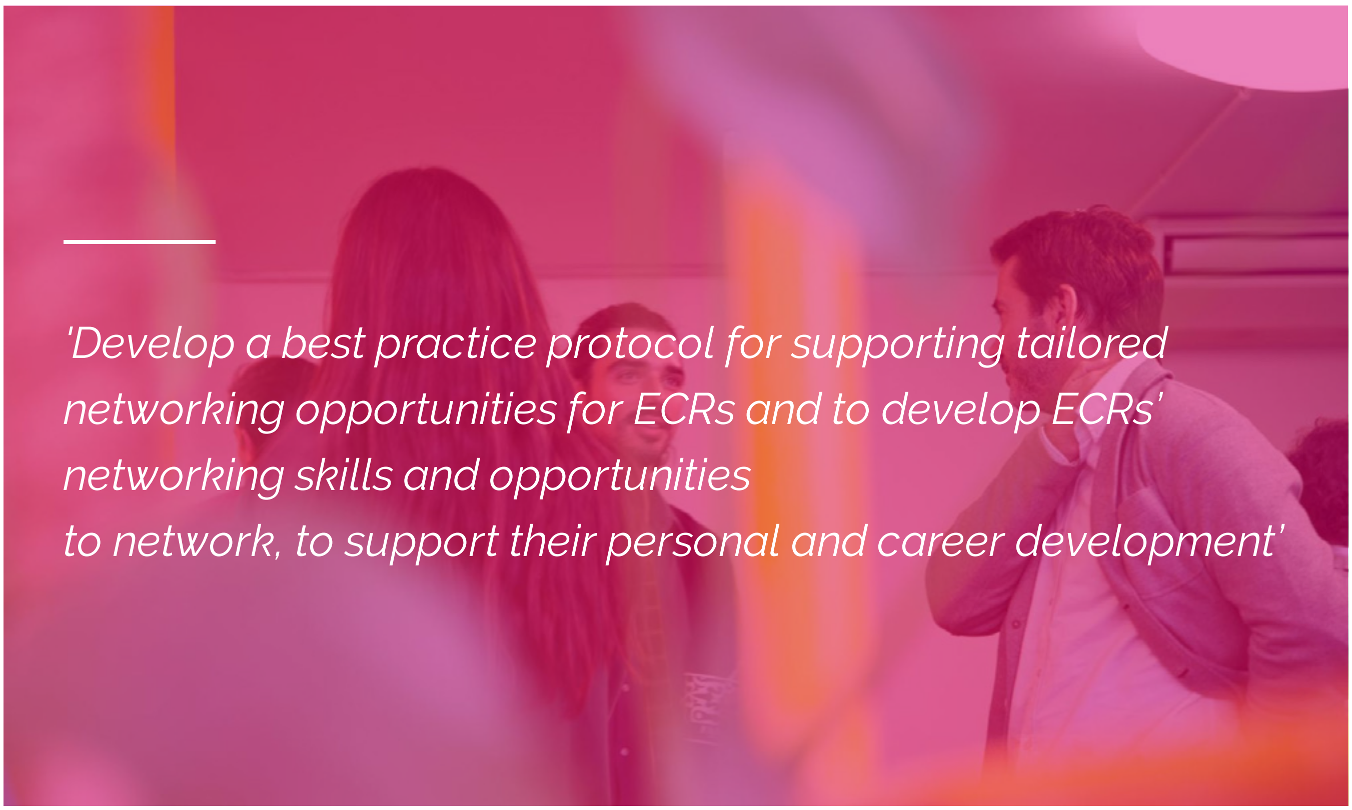
When organising networking activities, always consider access requirements on an individual basis, and be conscious of how aspects of identity can impact on a person's ability to engage in networking. For example, some may find it a scary process so would prefer to meet a networking or academic advisor online. Others may need more support in arranging conference attendance.

For comprehensive accessibility guidance on all for this activity, please go to the Accessibility and Inclusion section of the toolkit.

Academic Networking

About Academic Networking

Within the Northern Power Inclusion Matters project our Academic Networking activity aimed to:



What problems were we trying to solve?

'Networking' which has been defined as "building, maintaining and using personal relationships in order to facilitate the exchange of work related resources" (Wolff and Kim 2012), is positively related to subjective and objective measures of career success and therefore is important to early career academics' success.

However, research also indicates that women and minority groups have limited access to critical networks and make less use of networking behaviours (Forret and Dougherty 2004; Quinlan, 1999).

The requirements of ECRs regarding opportunities for and support in networking have not been systematically assessed (Ansmann et al, 2014). Networking interventions therefore recommend understanding skills, needs and challenges in networking and providing tailored opportunities and resources (Ansmann et al, 2014).

What were we aiming to achieve?

The aims of the activity were to:

- Provide members with the opportunity to participate in networking activities to support their personal development and career objectives

- Develop the activity in a way which could be sustainably implemented within HEIs

In order to do this, a number of factors were taken into consideration when developing the activity:

TAILORED OPPORTUNITIES	GUIDANCE

The recommendation to understand ECRs skills, needs and challenges through the provision of tailored opportunities (Ansmann et al, 2014) required a modus operandi that included personalisation of networking opportunities.

TAILORED OPPORTUNITIES	GUIDANCE

Guidance which fits within existing HEI structures

Providing guidance which can be sustainably implemented needs to fit within existing HEI structures. Support mechanisms through line management, mentoring and/or personal development review processes are typical within HEIs. Staff in such development positions can include professional trainers (through an internal training and development function or external sources) and also academic staff such as line managers.

What did we do?

The methodology followed an action research approach where the research goals were oriented towards change (i.e. tailored networking opportunities for ECRs) in the form of creating practical solutions (i.e. best practice protocol) to identified problems (i.e. limited and unequal access to networking).

The activity consisted of two parallel strands of training and development, and evaluation and reflection:

The activity consisted of two parallel strands of training and development, and evaluation and reflection:

- Training for networking advisors
- Development and experience for networking participants

There were three roles involved in delivering this activity:

- Participants
- Trainers
- Academic Networking Brokers

A protocol to deliver the activity was developed and Trainers delivered a bespoke programme of training for the Academic Networking Brokers. We found it beneficial to have Academic Networking Brokers who were typically established in their careers and had a good base understanding of the organisation and its existing support and development mechanisms.

Participants attended a one to one session via video conferencing with their Academic Networking Broker. They co-identified their networking needs and priorities and developed a Personal Development Plan (PDP) with specific networking activities identified to address those needs.

Participants undertook networking activities to develop greater awareness of career development opportunities, to access peer support networks and to increase their visibility.

There were a maximum of five follow-up sessions with their Academic Networking Broker, dependent upon the needs of the Participant.

A personal budget of £400 was allocated to each participant which could be used to support costs of undertaking networking activities and attending events.

What were the anticipated Key Benefits?

FOR EARLY CAREER PARTICIPANTS

- Greater awareness of career development opportunities;
- Access to peer support networks;
- Increased visibility within own institution and beyond.

The Networking Intervention Research Protocol

1

Design Phase — What we did

Our research protocol was designed to address the aims and outcomes identified above, namely to: '*develop a best practice protocol for supporting tailored networking opportunities for ECRs and to develop ECRs' networking skills and opportunities to network, to support their personal and career development*.'

The methodology followed an action research approach where the research goals were oriented towards change through the provision of tailored networking opportunities for ECRs, by creating practical solutions (best practice guidelines) to identified problems (which were unequal and limited access to networking). Our networking intervention there involved developing, implementing, evaluating and reflecting on our networking intervention.

There were two parallel strands of training and development and evaluation and reflection which involved:

- the training of networking advisers;
- the development and experience of the networking participants

2

Networking Adviser Training

Potential Academic Networking Advisers who were academic EDI colleagues related to the Faculty of Science, Agriculture and Engineering, Newcastle University were invited to attend training to ensure consistency in the basic skills to carry out the steps within this activity. We worked with our Organisational Development team to produce a bespoke training workshop. The training was based around the 'GROW Model' (Whitmore, 2017). A two hour training session was delivered in person. By the end of the training session colleagues were aware of the 6-8 hour time per participant, the active listening skills to support the coaching-based career conversations and insights into potential networking activities.

The Meetings

Meeting 1

Career Conversation and Identification of Networking Goals

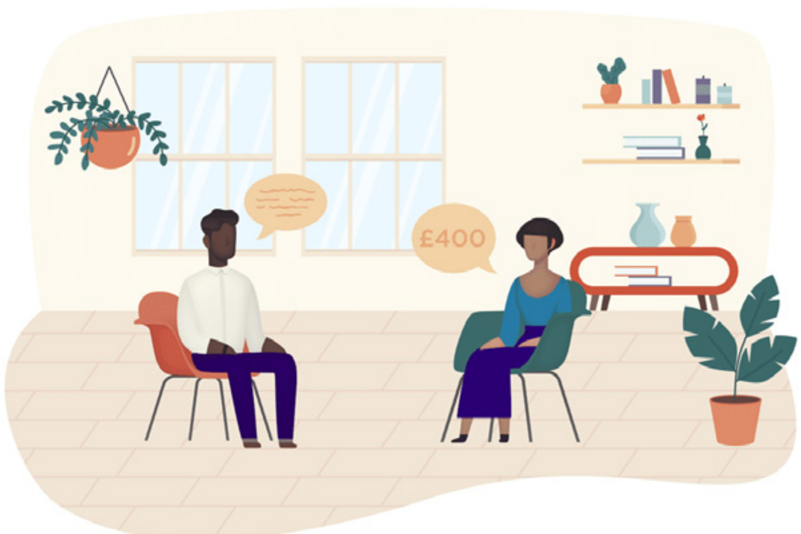
The first meeting with each networking participant was organised by the Academic Networking Adviser. This involved a **Career Conversation** during which participants were asked semi-structured and open-ended questions to understand the participant's career goals, their current situation (or reality); networking opportunities taken and potential obstacles around these, and a potential set of networking objectives (way forward), to enable an assessment of networking needs to be made. Based upon this GROW framework, a personal development plan was developed. Key goals and a bespoke list of potential networking opportunities to meet these goals was then developed. Examples of networking activities included:

- Networks internal to the participant's home University: e.g. research and development teams and teaching and learning teams
- Participating in Committees / Advisory Groups / Working Groups
- Hosting invited speakers
- Membership of professional associations and sub-committees
- Peer mentoring
- Presenting at seminars / conferences
- Participating in external leadership programmes.

Meeting 2

Networking Opportunities Conversation

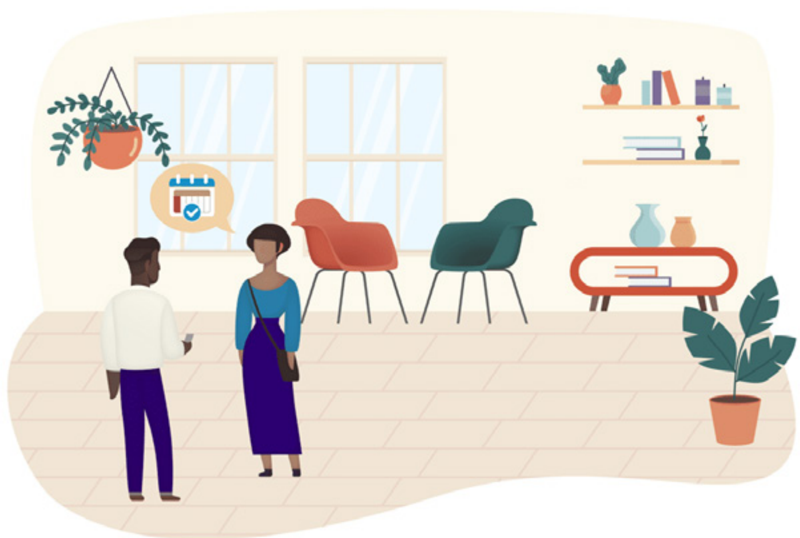
The second meeting with the participant, arranged approximately 2 weeks after the first, was a follow-up meeting to discuss the potential networking opportunities that might assist the participant work towards their personal goals. The participant was reminded of the £400 budget that could be used to support networking.



Meeting 3

Update Conversation

A 'check-in' meeting to discuss progress towards networking goals and to identify any potential barriers to participation was organised at the end of meeting 2



Meeting 4

Participant Debrief

A final debrief meeting to review the networking offer, determine any potential benefits and any challenges experienced was the final adviser/participant interaction.

Document Templates

Networking Personal Development Plan.docx

27.6 KB

Networking Suggestions Template.docx

45.5 KB

4

Networking: Findings and Useful Advice

Based upon both the evaluation of the networking intervention activity, adviser reflections and ECR participant feedback to networking advisers, the following advice is provided:

Finding 1

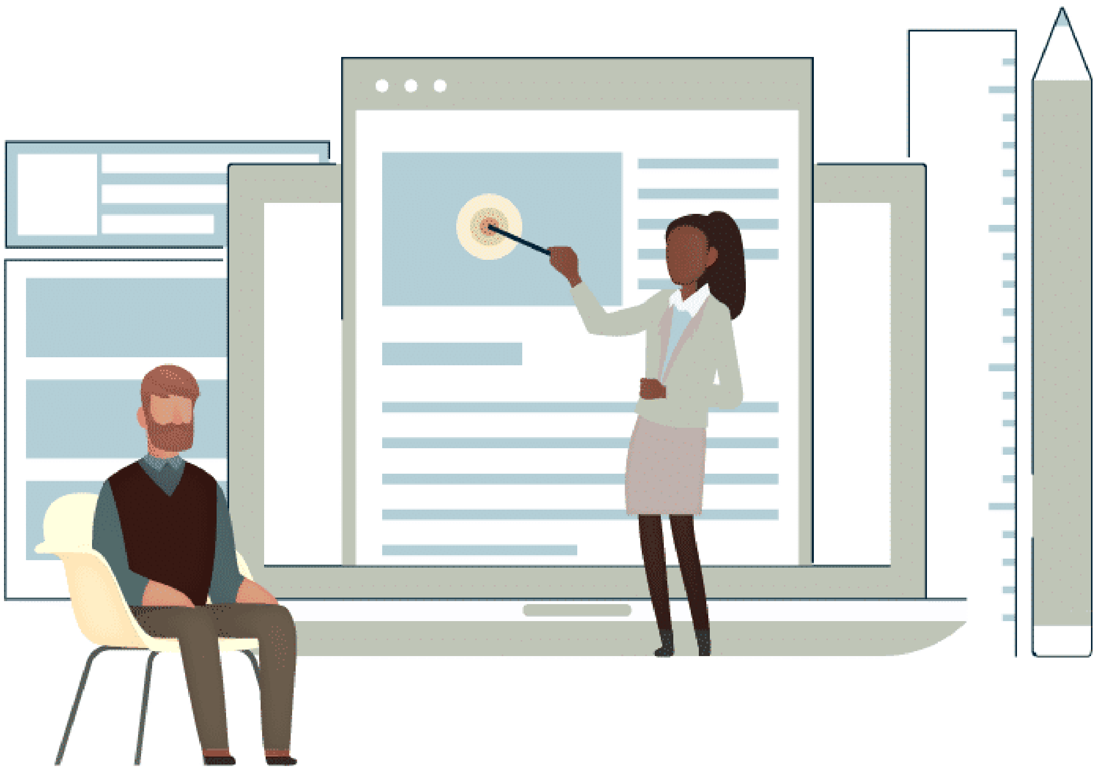
Networking is an enabler to other career goals

Networking is not a goal in itself, instead it is a strategic enabler to help ECRs achieve professional goals (progression, promotion, grant applications). It provides a prism through which the career ambitions of ECRs can be both understood and facilitated. This facilitation can occur through breaking down a career aspiration into practical steps or tasks, identifying the people/roles (networks) that could support achievement of a task, and anticipating the potential barriers that might impede progress and how these might be addressed. Therefore:

- A networking adviser and/or providing networking advice involves mentoring and coaching.

Finding 2

Internal administrative support networks



There was a lack of awareness of internal administrative support networks within home institutions by ECRs. Many of these support networks, for example research development teams to support new investigator or fellowship applications, would support career development. Therefore:

- Line managers or other staff in a position to provide networking advice to ECRs should have a good working knowledge of the support services that exist within their Universities to enable signposting, e.g. to research training or research development teams; data management teams; business development teams etc.

Finding 3

Confidence through challenging cognitive structures

An increase in confidence was a self-reported benefit of the frequent interactions of the ECRs with their Advisor. In many cases this came from constructive challenge of potential barriers to goals including the questioning of the status quo in institutional practices, and also the process of reflecting back an ECRs achievements to them and/or identifying the impactful nature of their work on their colleagues, academic discipline or students. Therefore:

- The networking advice process can be used to constructively challenge the 'status quo' and reflect ECRs achievements to them to support confidence and creativity.

Finding 4

Networking advice as a sustainable activity within HEIs

- Networking advice can deliver personal and career benefits for ECRs if applied to the achievement of their personal goals
- Providing networking advice requires an understanding of internal networks and sources of support within HEI
- Networking advice requires advisor time, knowledge of HEIs and active listening and coaching skills. If line managers are expected to undertake this activity, training in active listening and coaching skills and acknowledgement of this activity in work contribution models would be recommended.

Being Prepared for Business

About Engaging Collaboration — Being Prepared for Business (BPB) and University Industry Collaboration (UIC)

The Being Prepared for Business (BPB) activity offered a series of connected workshops and online content aimed at equipping academic participants with the skills and knowledge to be confident in approaching collaborations with industry and businesses.

The University Industry Collaboration (UIC) programme intended to create strong research connections between industry and ECRs.

The activity worked with 8 industrial partners to create research links, share EDI good practice, provide networking opportunities and offer personal development.

What problems were we trying to solve?

Evidence has shown that those from underrepresented groups are less likely to put themselves forward for work-related opportunities. The BPB activity aimed to give advice and support to under-represented groups about how they can approach businesses and gave them the skills to put themselves forward for industry opportunities and collaborations.

Anecdotal evidence also suggests that industry work-life balance is potentially more family friendly. This often results in people leaving academia (predominantly women) to pursue a career in industry. By bringing industry and HEI together to share opportunities, networks, best practice and advice, this potentially contributes to a more inclusive working environment and the implementation of flexible working patterns outside of industry.

What were we aiming to achieve?

Providing collaboration opportunities with industry for members of groups under-represented in EPS may provide the sharing of good EDI practices, individual confidence and self-awareness amongst ECRs, and enhancing the likelihood of research-focused links between communities and disciplines. These benefits can help support the embedding and acceleration of cultural change in EPS, and academia more widely.

The workshops allowed participants to explore real industrial challenges and show how their skills can support industry and business. The activity aimed to equip ECRs with essential skills to successfully collaborate and interact with Industry.

The findings from the Northern Power Inclusion Matters literature review found there were key areas that would benefit and make for strong UICs. These findings were used as an evidence base for the UIC activity and informed the development and structure of the workshops.

What did we do?

WHAT DID WE DO?	WHAT DID WE FIND?

The workshops provided a space for skill-based learning that predominantly focused on:

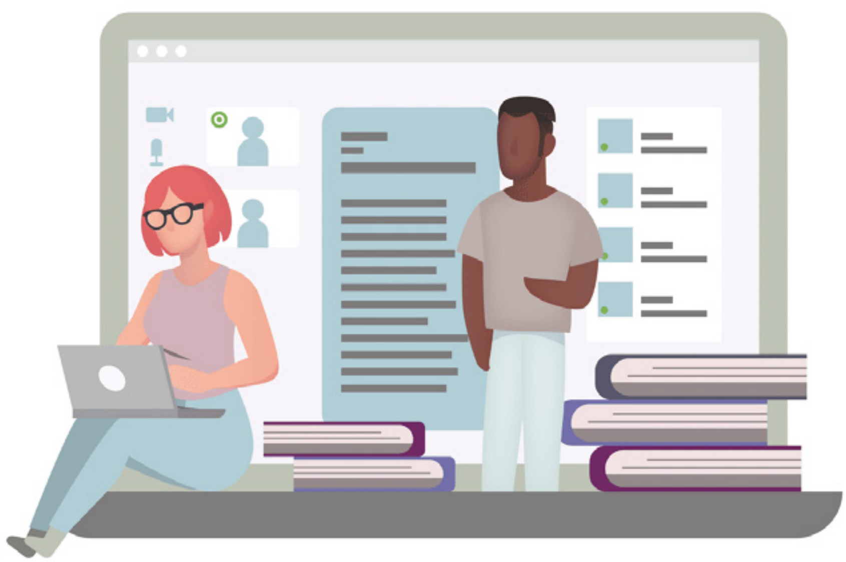
- Discipline-specific industries
- The benefits of collaborating with industry
- How to approach industry
- How to network with industry
- How to build your brand as an academic
- How to sell yourself (pitching to industry)
- Media preparation
- How to make the most of industry partnerships
- What industry would be looking for

This Online element of the resources provided training material, engaging content, and opportunities for discussion about how ECRs might prepare themselves for beginning collaborative relationship.

WHAT DID WE DO?	WHAT DID WE FIND?

The findings from the review, highlighted the below characteristics make for a successful UICs:

- A strong, clear vision and clarity about what both parties hope to gain from the collaboration
- Relationships that demonstrate trust
- Clear roles and responsibilities for those involved
- All involved open to accepting different values, cultures and norms
- Meetings between academics and practitioners should be well-planned
- Compatibility of problem-solving styles to facilitate successful collaboration
- Compromise and acceptance about commitments & responsibilities of those involved
- Frequent opportunities for dialogue and interaction
- A grounding in common/ overlapping knowledge about research and the discipline



The Workshops

The activity comprised of a workshop series that focused on three main elements, all of which aimed to develop Early Careers Researchers' skills for UICs. The workshop series took place over a period of 12 months. The first workshop was conducted in person, but other workshops occurred online. Online content was developed and published to support those attending the workshops and provide resources for further reading and development.

The structure of the programme intended to benefit participants by giving them multiple exposures to activities and knowledge, as opposed to a one-day standalone workshop. This learning approach gave participants the opportunity to go on 'journey' of development, which can potentially influence long-lasting personal change. The activities also sought to augment rather than replicate support provided by participants' home institutions.

1

Workshop 1 — EDI in Engineering and Physical Sciences

This first workshop set out to explore overarching themes within EDI as they may play out in the engineering and physical sciences community, both academic and industrial. The workshop used a combination of 'personal stories', descriptions of training and intervention as well as a panel discussion to cover topics such as; Imposter Syndrome, Privilege and Being an Active Bystander.

The 'personal stories' looked at EDI form the perspective of the lived experience of an individual academic and the widely differing, attitudes, approaches and experiences of working in different HEIs as well as from the leader of a faculty wide major change project.

Bringing together our industrial partners yielded excellent examples of the positive steps they are taking to realise the value of diversity both in their workforce and also in their engagement with their clients.

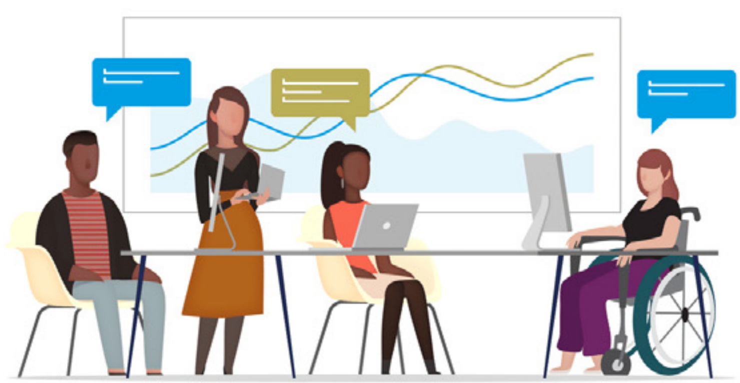
The key take away from the workshop was the positive strength and clarity with which industry partners are engaging with EDI and the opportunities for both individual academics to collaborate in industrial projects and also for HEIs to see an organisational vision in action.

Workshop 2 — Personal Branding for Academics Workshop

The second workshop covered a variety of topics on personal branding for academics. The workshop had a range of speakers that stretched across industry and academia, and included writers, academics and practitioners.

The main aim of the workshop was to give practical information and evidence based knowledge on how to build an academic brand and market to industry. The main themes from the day included; how branding can help develop links with collaborators, how a personal brand can be used for career progression, practical guides to building a brand and USP, how to build an internal brand, and how to present effectively.

The key take away for the workshop was seeing opportunity, looking beyond the usual measures of academic esteem and how clear planning can lead to a clear vision and clarity about what both parties hope to gain from the collaboration.



Workshop 3 — Communicating with Business Workshop

This one-day workshop took place virtually (through Blackboard) and focused on how ECR could approach and communicate effectively with businesses, and utilise the media for promotion and opportunities. The focus of the session was to give advice to participants about how to effectively approach engagement with businesses and to help them understand the importance of developing good working relationships with industry representatives. This session aimed to provide ECR with the practical skills to reach out to businesses for UICs.

Topics covered during the workshop included;

- Say yes more. Yes opens doors. No closes them. Yes pushes us. No keeps us safe at home. Imagine all the opportunities waiting for a yes.

- Let go of expectation. You've done your best to prepare. Now, let go. There's no one way your life should unfold. Enjoy the journey.

- Welcome diversions. The most rewarding adventures often start with an unexpected detour. Perhaps that distraction will guide you onward.

The on-line format of the workshop enabled materials to be easily incorporated within the project web portal as bite-sized video presentations strengthening their core messages.

Workshop 4 — Personalised Communications Training Programme

This activity of the BPB programme was a personalised training opportunity that took place over a 3 month period. This opportunity provided ECRs with bespoke training designed by Hot Seat Training, in collaboration with the Northern Power Inclusion Matters project.

The training was developed to help support ECRs to create and maintain strong industry and academic connections. The training was designed to support ECRs in communicating about their “personal brand” and gave advice on how they could market and promote their skills and strengths for UICs.

The tailored training was conducted in small groups, with participants being supported by one trainer. Each group had two 90 minute sessions, the first session worked through strategies and techniques for self-promotion, and the second provided individual feedback on how participants communicated their skills and knowledge to experts outside of their own discipline. This attempted to give ECRs practical actionable advice for moving forward in their careers, a form of personalised development opportunity.

The format of the sessions enabled participants to explore what they personally could bring to any UIC, moving beyond the traditional academic measures of esteem and understanding that a collaborator is looking for solutions, moving forward with the outcomes of knowledge discovery rather than rather than dwelling on the knowledge itself.

It was evident that attending small group coaching sessions was a more significant personal commitment that to sign-up to a larger on-line workshop but that once the commitment was made personal engagement was strong. We also observed that we had built knowledge and confidence in making connections with potential industry partners, the dialogue and interaction, but the subject of these interactions required further development. Having developed an understand of how to communicate with industry we identified that how to ‘package’ a project as a structured process with defined outcomes that industry can buy into was needed. Such training opportunities also did not seem to be evident within HEIs standard diet of researcher training.

Workshop 5 — Communicating Your Offer Training Programme

The final activity of the BPB programme was another personalised training offer that took place over two months towards the end of the project. This opportunity provided ECRs with bespoke coaching designed by 'how2glu' in collaboration with the Northern Power Inclusion Matters project. The training was developed in response to a need identified in the earlier activities and sought to help support ECRs to move beyond making their initial industry connections. The training was designed to support ECRs in defining the specific offer they are making to the industry partner, how it could be packaged for delivery and achieve defined outcomes for the UIC.

These sessions offered a practical, two-part coaching programme designed to take the participants through the principles of defining and communicating their personal offer to industry audiences and guide them as they develop, hone and communicate their specific technical offer. The programme consisted of two 1.5-hour coaching sessions, each with two participants and one coach, and supported between session by activities based upon access to a range of tools, mock examples and additional resources.

A specific take-away for the participants of these coaching sessions was the demonstrating and personalised use of a diagrammatic tool for planning and monitoring the process of translating the idea behind a collaboration into a set of defined outcomes for the industry partner 'buy into' and the steps that need to be taken to realise these outcomes.

Online Materials

As part of the BPB programme, online materials and resources played a key role in supporting the ECRS through their journey. The resources were uploaded to the project platform and were made available to the appropriate ECRS. The online resources included:

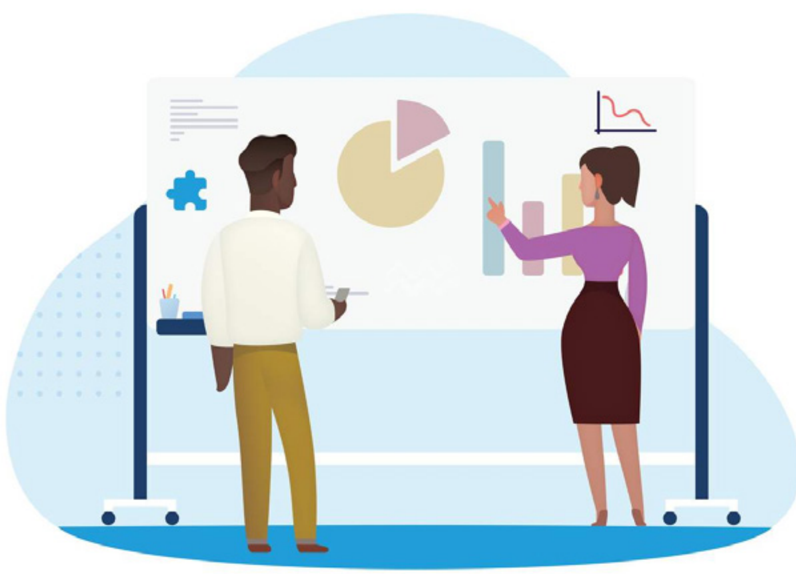
The necessity to move to an on-line format, rather than being able to 'take participants for industry' as originally planned made the web portal an important tool for making material available. It has been observed that this substantially changed the nature of engagement with the activities as we all had to engage with new ways of working. We feel that it was particularly challenging to replicate the engagement of a physical event with peers of a like mind with yet more screen time.

What were the anticipated key benefits?

FOR EARLY CAREER PARTICIPANTS	FOR INDUSTRY PARTNERS

The anticipated benefits for ECRs were:

- Exposure to current industrial challenges
- Opportunity to network with others from the EPS community
- Opportunity to engage in meaningful discussions and develop an understanding around current EDI issues within the discipline
- Opportunity to develop skills to carry out collaborative research projects with industry and actively engage with industrial partners
- Focused time to explore opportunities for potential research collaborations
- Develop a personal brand and ability to pitch and showcase in an industry-relevant way
- Build confidence in talking to potential collaborators



FOR EARLY CAREER PARTICIPANTS

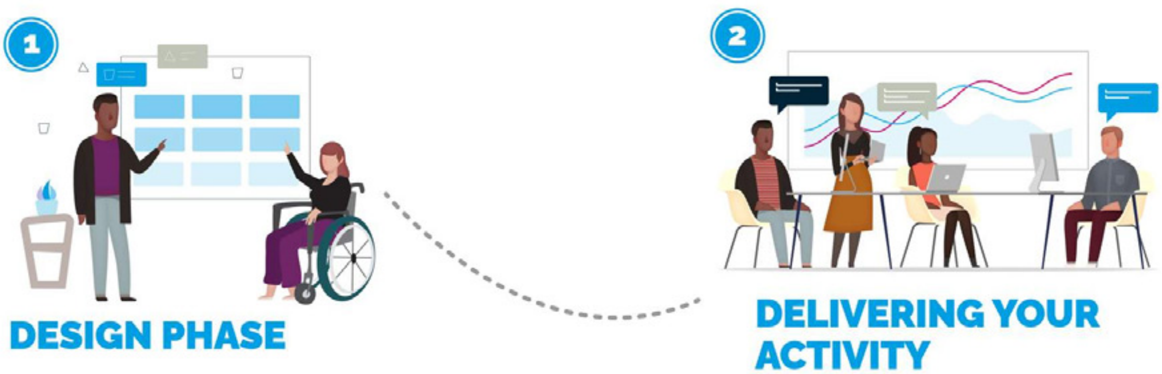
FOR INDUSTRY PARTNERS

The anticipated benefits for Industry partners were:

- Opportunity to network with others from the EPS community
- Opportunity to engage in meaningful discussions around current EDI issues within this discipline
- Opportunity to expose their current technical challenges to ECRs.
- Focused time to explore opportunities for potential research collaborations

The workshop series and collaboration activities primary purpose was to equip ECRs with knowledge and practical guidance on how to have successful and fruitful collaborative relationships with industry. This series of connected workshops and online content also enabled industrial partners to share discipline-specific challenges with researchers in their field, with the aim of forming long-lasting collaborations. The BPB activity attempted to give participants access to resources, knowledge and opportunities, to build their confidence and motivations. This was intended to help support personal and cultural change across the sector.

How to Implement Being Prepared for Business



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Design Phase

In designing your Being Prepared for Business Activities you will need to:

Define participants
– what are the criteria to be in scope as an Early Career participant

Design your Reciprocal Mentoring activity, include:

how you will publicise the workshops and events

how you will register participants

what content and training will they cover

length and number of the events

how you will deliver events – online or in person

identify speakers, trainers and facilitators

how long should each event be

how many events and workshops you will run

covering expenses – for in person event travel expenses for participants and speakers, trainers and facilitators. Fees for contributors delivering the events

evaluating impact opportunities for gathering feedback, reflecting and refining the programme

Produce the documents

Participant information sheets (PIS)

Privacy Notice (PN)

Communications

Consent

Delivering your activity

Communications

Consider how and when you will be communication with potential and signed up participants. Email was used for this activity. It was found to be important to consider who will be seen as the sender, for example if they are an individual known that the participant may associate with the project of a non-personal email that identifies the project, known individuals are believed to be more successful but this does add complexity when a team is delivering the project. Equally important is the subject line as this often forms a filter, either automatic (spam filter) which may vary by organisation or through personal prioritisation.

Forward planning in announcing events took consideration of anticipated academic time demands for example we avoided sending emails during times such as exam marking or the early weeks of the teaching calendar.

Ethics

We were conscious of the potential for additional ethical considerations beyond those of the project as a whole, for example we did not record or take photographs at events.

Useful Advice

We found that taking a flexible approach to attendance at physical workshops had a large influence on attendance with some potential participants feeling that a whole day was too much commitment, if they were local, but we recognised that we had a responsibility towards any participants traveling any distance to make it worth the effort.

From experience we were well aware that the overall atmosphere of an event is greatly enhanced by the timing and quality of catering provision. Where a participant may have travelled for two or three hours to attend an event being welcomed by a supplement to their early breakfast makes an excellent start to the event.

Accessibility and Inclusion

When running a workshop or training series, consider a flexible approach to timings and dates. For example, our Being Prepared for Business programme found participants appreciated a flexible approach to engagement. If they couldn't attend a training session due to caring responsibilities, another date was added. This led to better engagement and participant satisfaction.

We took specific care at workshop events to ensure accessibility, both the most obvious physical access such as ramps, doorways etc and gender neutral toilets but also the broader concerns of a participant unfamiliar with the location of the event. We sought to have workshop locations in buildings that were easy to identify from a public space as well as using rooms that were in close proximity to the entry point of the building, avoiding a participant needing to negotiate corridors and stairways/lifts deep into an unfamiliar building.

We made all slides available and invited participants with any specific accessibility need to inform us so we could accommodate this.

We gave a verbal reminder of 'workshop etiquette' at the start of each event and recommend that facilitators are very conscious of the opportunity for unintended offence to be caused by some aspects of language during any open discussion or questioning session. One approach taken was to invite speakers or questioners to state their preferred terms in the same way we invited participants to share their preferred pronouns and name on name badges.

For comprehensive accessibility guidance on all for this activity, please go to the Accessibility and Inclusion section of the toolkit.

Accessibility and Inclusion

What is this Toolkit?

As part of the Northern Power Inclusion Matters project, we have created an Accessibility and Inclusion toolkit that provides guidance, support and resources for making every day working life accessible and inclusive to all. The Toolkit comes with advice and guidelines on practical and actionable mechanisms to provide supportive and inclusive environments, for different user-groups, in different settings. This toolkit provides useful things to consider and basic principles for engagement, so everyone has equal access to information and opportunities.

Throughout the project we have adapted our processes and actions to try and be an inclusive space. We have produced this toolkit to help support future EDI work, provide support to individuals, highlight best practice for in-person and online content, and provide useful resources for learning and development.

Disclaimer

This is not an exhaustive list of EDI guidance. The toolkit covers key considerations from the Northern Power project and refers to best practice from key resources and project partners. This toolkit is not a stand-alone, it includes information and resources collated from and cited in other materials. Please refer to the full resources list for references and further reading.

What do we mean by 'Accessibility'?

The Northern Power team frame accessibility as practices that allow for the safe and easy consumption and access to information. When considering accessibility, we have provided guidance for 4 main themes; vision, hearing, motor and cognitive.

What do we mean by 'Inclusion'?

The Northern Power team define inclusion as practices that allow for the safe and fair representation and involvement of different people, cultures and communities, which lead to feelings of 'belonging', 'inclusiveness' or 'togetherness'.

The Northern Power Inclusion Matters project aimed to support the following groups in STEM; women, LGBTQ+, the BAME community and those with disabilities. Therefore the following inclusivity guidance focuses predominantly on these main aspects of identity.

Guidelines

In order to inform practice, we have developed guidelines for two main environments; physical (in-person), and virtual (online). In-person environment can include (but are not be limited to); offices, workspaces, events, meeting rooms, toilets, cafes etc. Virtual environments can include; websites, video conferencing, forms, surveys, resources/documents, videos, software etc.

For the Physical Environment

When arranging office spaces, planning events, or scheduling meetings, we suggest you consider the below guidance. Of course the starting point for any event is to always ask participants if they have any specific requirements.

Accessibility Guidance

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE AND LANGUAGE

- Provide 'access copies' of relevant documents in advance of meetings, events and deadlines, so people can read beforehand (this can include; agendas, PowerPoint slides, reports).
- Don't assume vision is granted for all attendees or employees. For example, before starting a meeting, always ask if everyone has the requirements they need to engage (for example, a seat closer to the screen, a paper copy etc).
- On printed documents and PowerPoints use clear and large/medium font size.
- On printed documents and PowerPoints, use colours that have a good level of contrast (consider using a colour contrast checker). Avoid colours like green and red, as these are two common colour blindness colours.
- Avoid using colour as the only indicator for information (for example statistics, or graph colours, red/amber/green reporting), consider also bolding information or underlining.
- As an alternative to print copies, offer digital copies to assist with screen readers (see below guidance).

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE AND LANGUAGE

- When English is the most appropriate/predominant language, speak in plain English and use simple sentences.
- Provide 'access copies' of relevant documents in advance of meetings, events and deadlines, so people can read beforehand and can follow along during.
- Ensure the destination room/location is away from distracting background noise where possible, (for example, avoid rooms next to a working building site).
- Use live captioning technology (always ensure that your chosen platform supports this) or provide a sign language interpreter(s[ARJ1]).
- Always allow attendees to choose their own preferred seat for communicating, avoid pre-assigning seats.
- Communicate with colleagues about their preferences ahead of time, you could include this in the diary invitation to the meeting.

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE AND LANGUAGE

- Ensure the meeting room, desk space, event area, is suitable for those who use a wheelchair or walking aids. This includes, travelling to the location (through the building, accessing floors and entering the room, as well as the destination space).
- Give as much notice as possible for meetings and events that require travel, so people can make travel and carer arrangements if they need assistance.
- Make it possible for people to visit the meeting room in advance of the meeting (for example, book and provide location details well in advance of the meeting).
- Allow people the opportunity to choose their seat, this includes those who need space for a wheelchair, those who prefer to be closer to a window for natural light, or those who need to be closer to the exit. Ensure that others can also be seated within these locations comfortably allowing for participants to sit with colleagues.
- Ensure your meeting, office space or meeting room is close to toilets, and people don't have to travel to another building to access.
- If there is limited lift access, hire a room or event space that is on the ground floor.

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE AND LANGUAGE

- Use diagrams to help explain complex themes or concepts, as some find diagrams easier to understand.
- Allow for regular breaks in activity whether that be during tasks, workshops, or events.
- Consider translating documents into other languages, depending on participant requirements or needs.
- Think about providing attendee information to all attendees, let people know who will be at the meeting and what their role is.
- Consider giving people photos of attendees who will be at an event, so people are aware of who will be there and can familiarise faces. If doing so, please get agreement from all attendees that you can use their image.
- Avoid loud noises like clapping, banging or loud film/video sounds. Consider discussing other options for clapping, for example using sign language to applaud (hand waving) rather than clapping.
- Some people may not feel able to contribute during the meeting, event or workshop, so provide contact details so people can follow up by email or phone afterwards.
- If using acronyms, always explain what they mean, and never assume taken for granted knowledge.
- Avoid the use of jargons, and use plain simple English.
- When producing physical documents, ensure text is left aligned where possible.

Inclusion Guidance

- When addressing people don't assume someone's gender, try using gender neutral language, like they/them.
- Consider using name badges and including preferred pronouns on the badges for in-person activities. Or at the start of the meeting/event ask attendees to introduce themselves with their name and pronouns.
- Avoid using gendered terms such as 'welcome ladies and gentleman', instead use 'welcome everyone'.
- Identify both accessible and gender neutral toilet provision, and signpost to any other relevant facilities.
- Avoid using language that assumes heterosexuality is the normality. This can include phrases like 'boyfriend/girlfriend' or 'husband/wife', try to use 'partner' or 'spouse' instead.
- When referring to sexuality, avoid terminology that implies a person had a choice. For example, 'sexual preference' or 'lifestyle choice'.
- Don't refer to a person's race unless they introduce the topic first, or it's directly related to the conversation.
- Try using adjectives rather than nouns when referring to a person's race. For example 'Asian people' rather than 'Asians'.
- When discussing disability, always by mindful of language. Some people prefer putting the person before the disability. For example, 'person with a disability' and 'people with disabilities'. Others may prefer 'disabled person' as they consider themselves to be disabled by society. Always avoid 'the disabled'.
- Avoid terms that imply having a disability is not 'normal' or 'natural' that people with disabilities aren't healthy. Avoid the term 'able-bodied' and 'the disabled'.
- Don't assume someone's ability, by providing help or assistance before asking the person first.

- Always ask dietary requirements well in advance of any meeting or event and ensure you have Halal, Kosher and/or vegetarian alternatives. Including options for those who do not eat certain meats, gluten or diary, for religious, personal or health reasons.

- When scheduling meetings and events, take into consideration cultural holidays and religious days of significance, to ensure the event is inclusive to all.

For the Virtual Environment

When working online, we suggest you consider the following guidance. Web and online content should adhere to Government accessibility guidelines which detail 4 main design areas:

1. **Perceivable** (users can recognise and use your service with the senses that are available to them)

2. **Operable** (users can find and use your content, regardless of how they choose to access it (for example, using a keyboard or voice commands))

3. **Understandable** (users can understand your content and how the service works)

4. **Robust** (users can interpret content reliably by a wide variety of user agents - including reasonably outdated, current and anticipated browsers and assistive technologies)

Accessibility Guidance

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE

- At the start of any event, if you are a speaker, consider giving a visual description of yourself for those who are partially sighted or blind.
- Always use medium to large clear font (a minimum of size 12) with a good colour contrast (e.g. black and white), using simple clear fonts (ie. Arial, Comic sans, Verdana, Century Gothic).
- Describe images and transcribe videos (using alt text and captioning for screen readers and assistive technology). Captions and descriptions need to be a literal description of the image and why it is being used. Do not use images of text content, this should be in a textbox or in the website code.
- Use descriptive page titles, links and headings.
- When building websites and online content, build with 'keyboard use only' in mind, and voice command capabilities.
- Ensure active focus is accurate and intuitive – Make it easy for keyboard users to see the item their keyboard or assistive technology is focused on.
- Make sure status messages or modal dialogs boxes are labelled in a way that informs users of their presence and purpose.
- Include punctuation in bulleted lists to help with screen readers (for example, finish bullet points with a full stop).
- Assistive technology needs tables to have HTML mark-up that indicates header and data cells, and defines their relationship with one another. For full guidance, see resources below.
- On websites and for online content, avoid certain colours (red/green for colour blindness), pale colours on pale backgrounds.

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE

- Use closed captions or provide full transcripts for videos.
- Consider a sign language video for media that contains audio.
- Allow the option for subtitles on video and video conferencing ensuring that users can access this function independently.
- Don't put content in video/audio only, provide information in a variety of modes.

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE

- Make large clickable actions and avoid brief simple descriptions like 'click here'. A good example would be 'use this link to register for our workshop event in May'.
- When building websites and online content, it needs to be accessible to a variety of users and systems. Ensure your website or content can be viewed and read with keyboard-use only, with voice command capabilities, touchscreen and mobile-use only.
- Provide shortcuts for tasks (e.g allow autofill capability for an online survey or form).
- Allow flexibility with the orientation of web content, ensure orientation is not restricted to only portrait or only landscape.

VISION	HEARING	PHYSICAL/MOTOR	COGNITIVE

- Write in plain English and simple sentences, make buttons and functions descriptive and simple.
- Use simple, neutral colours.
- Use a simple and consistent layout.
- Avoid using flashing videos and text that use bright colours and patterns. Or if this is needed, provide a content warning.
- Allow for breaks in online activity. Enable autosaving, and allow users to save progress and return (for example, on online forms and surveys).
- Group sentences into short sections, sentences should be around 20 words in length.
- Use images and diagrams to helps explain information and support text.
- Try to left align text where possible – this makes it easier for those with dyslexia and those who use screen magnification.
- Use simple clear fonts (ie. Arial, Comic sans, Verdana, Century Gothic).

Inclusion Guidance

- When hosting online events, allow people to join without videos.
- When hosting online events, allow people to self-select their own name to join.
- Consider asking people to include pronouns in any name titles.
- Include your pronouns in your email signature.
- When conducting video conferencing, ensure closed captioning is enabled, or consider hiring a transcriber.
- When people are joining virtual events and meetings from home, be conscious of conversation topics that could be of a sensitive nature, where people may not feel comfortable knowing family, friends and housemates could overhear.
- Where appropriate, make imagery sensitivity diverse and inclusive, this includes on websites, marketing materials, documents, in videos and resources.
- Finally, never be afraid to ask participants for input if you are unsure on language or what type of access support is required.

Glossary

Statement on Use of Language, Abbreviations and Terminology

The application for this project under the EPSRC Inclusion Matters funding call was submitted in April 2018. At the point of writing the proposal the language, terminology and acronyms used were widely used within government departments, the media and public bodies, and these were largely considered to be correct and inclusive.

At the end of the project, when producing the Toolkit, Evaluation Report and other outputs, there has been an evolution towards a more nuanced understanding of inclusive language, for example the implications around the use of the acronym BAME. Whilst we have used the acronym BAME in our analysis, we simultaneously recognise the complexities of using a reductionist term to describe a population that is highly diverse and has varying experiences and outcomes within higher education and society in general. Similarly, understanding around gender and sexuality and the language used has also progressed.

We have elected to preserve the terminology set at the start of the project, due to our obligation to maintain the identification of the participants as they stated in their agreement to be involved in the project.

General

Action Research	Studies or investigations carried out in the course of an activity or occupation
BAME	Black, Asian and minority ethnic
Call to Action	A marketing term for any content to prompt an immediate response
Disabled Person	A person has a disability if she or he has a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities
Early Career Researcher (ECR)	The sector standard term for academics in early career research roles
EDI	Equality, Diversity and Inclusion
EPS	Engineering and Physical Sciences
EPSRC	The Engineering and Physical Sciences Research Council (EPSRC) is the main funding body for engineering and physical sciences research in the UK
Evaluation	To critically examine a programme to understand how effective it has been in meeting its aims and to examine what has worked well or could be improved within its implementation

GDPR	General Data Protection Regulation
HEI	Higher Education Institution
Leaky Pipeline	The loss of individuals from under-represented groups at all stages of their career transition, especially early career stages
LBGT+	Lesbian, Gay, Bisexual, Trans, plus other sexual orientation groups
Methodology	A system of ways of doing, studying or teaching something
Modus Operandi	A particular way or method of doing something
PDP	Personal Development Plan
Protocol	The definition of a set of steps to be followed to carry out an activity or task
SMART aims	Specific, Measurable, Achievable, Realistic, Timely aims or actions

Project-specific Terminology

Academic Networking Broker	An individual who works with Early Career Participants in the Academic Networking activity to co-identify development needs, complete a Personal Development Plan, provide guidance ad suggest tailored development opportunities
BPB	Being Prepared for Business activity
Consortium Partners	Academic and Industry Partners in the project. University of Durham, University of Leeds, University of Hull, University of Huddersfield, Lancaster University, Newcastle University, Northumbria University, Teesside University, Arup, IBM, Atom Bank, Northumbrian Water, Sage, Siemens Gamesa, Stanley Black & Decker
Cross-institutional	An activity, initiative or event which involves one or more organisation
Early Career Participant (ECP)	The Northern Power Inclusion Matters project definition for early career participants eligible to take part in the project. 'From the first full-time, or significant part-time role as a working scientist (fixed term or permanent, research and/or teaching, potentially including self-supported through some form of personal fellowship or similar), to within the equivalent of the first 5 years or so in a full-time non fixed-term position, or a fixed externally-funded position with a guarantee, or expectation of transfer to a permanent role at the end of the funding period.'

Established Career Participant	An individual having appropriate experience and having attained an appropriately senior position. Within HE this might include staff at professorial, associate professor, reader, senior lecturer, principal research or teaching fellow role or equivalent although other role holders might be agreed following discussion
Northern Power Inclusion Matters	Abbreviation of the project title 'Northern Power: Making Engineering and Physical Sciences Research a Domain for All in the North of England'
Senior Leader Participant	Well-established in their career, in a leadership role with the ability to shape policy, deliver outcomes and influence cultural change within their organisation
Under-represented groups in EPS	Defined within the project as women, disabled people, LGBT+ and BAME (Black, Asian and Minority Ethnic) researchers in Engineering and Physical Sciences
UIC	University-Industry Collaboration

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Evaluation Findings

This practitioner toolkit incorporates the findings of the project's Evaluation report :-

Cramman, H., Gray, H., Siddiqui, N. and Tudor, J., 2021. Evaluation of Inclusion Matters - Northern Power: Making Engineering and Physical Sciences Research a Domain for All in the North of England: End of Programme Report. [online] Durham: Durham University.

Available at: https://doi.org/10.15128/r1j098zb14w.

PDF

Inclusion Matters Best Practice Literature Review.pdf

1.5 MB