



EDI Community of Practice Training Conference

16 and 17 September 2024

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Introduction

Foreword from the Organising Committee

Equality, Diversity and Inclusion (EDI) is continuously evolving. It is vital that we keep pace with those changes to ensure that our staff and students have the best experience of working and studying with us.

The EDI Community of Practice Training Conference provides an opportunity for you to invest time in your own professional development while considering best practice in addressing some of the key EDI challenges and opportunities we experience at Oxford. You will hear from expert speakers on a range of topics and meet with like-minded colleagues from across the University to exchange ideas and experiences.

The conference is focused on practical outcomes, and we have created this workbook to support your learning. Within it we introduce our speakers and the Organising Committee, and provide summaries, learning outcomes and key slides for each session. There are also worksheets where you can record your personal reflections on what you have learned.

As colleagues in roles where we are often siloed, it has been a pleasure to come together as a team to organise this conference. This event would have been impossible without the generous gift of time, energy and creativity.

We hope that you enjoy the conference and find this workbook a useful addition to your experience. We are grateful to the Diversity Fund for supporting the conference, and to Haleigh Bellamy, Natalie Catchpole, Iona Shaw, our speakers, and everyone else who helped make this happen – thank you!

All the best,
**Maddie, Elisha, Louise, Machilu,
Laura and Charlotte**

Introduction

About Our Conference Speakers



Mahima Mitra

Day 1: Influencing organisation culture

Day 2: Qualitative accelerator

I am a Senior Lecturer in Organisation Studies at the Saïd Business School, with special reference to Inclusion. I am also an Executive Coach on the School's MBA Leadership Coaching Programme. During the early stages of my career, I worked for the World Bank in India. Between 2018 and 2022, I served as a researcher co-investigator at the Saïd Business School on a Wellcome Trust-funded study examining professional identity development of under-represented academics. Before returning to the Business School in 2024, I worked as a Managing Consultant for a UK consulting firm, advising public sector clients across a range of strategy, economic and policy areas. My current research focuses on professional identity and organisational identification, responsible leadership, inclusive cultures and leadership diversity.



Marilyn Verghis

Day 1: Leading from where you stand

I am the Deputy Head of the Equality and Diversity Unit, and was previously the EDU Policy Advisor for Race, Religion and Belief, working on the University's Race Equality Strategy. Prior to moving to Oxford, I worked in EDI in Canada across higher education, healthcare, government and non-profit sectors, and as an external consultant on workplace EDI learning and leadership for a range of private sector firms across industries.



Laura Epton

Day 1: Having impact through professional practice

I've been passionate about EDI at the University for several years and am driven by creating organisational leadership and cultures that truly value, recognise and enable individuals to succeed at every level. In my central role, I lead policy and strategic projects aimed at preventing bullying and harassment, drawing on my experience in departments working in partnership with senior leaders and team leads to advance EDI in teaching and research. Committed to continuous learning, I'm currently training to become a professional coach, accredited with the EMCC.



Sarah Lewis

Day 1: Having impact through professional practice

I am an insightful change and organisational development practitioner, with a practical and empathic approach. I have a BSc in Psychology and an MA in Organisation Studies from Warwick Business School. I enjoy working with individuals, groups, teams and organisations to help to make progress on the things that matter to them. I have over twenty years of experience working in central government, local government, higher education and the private sector.

I really enjoyed working in the People and Organisational Development team at the University of Oxford for two years. I love sport and am a coach for my daughter's local football team. I am deeply passionate about developing communities of practice and networks and am very much looking forward to working with the EDI Community of Practice at the training conference to recognise and celebrate all of the important and fantastic skills that EDI professionals bring to the University.



Sanjiv Lingayah

Day 1: Reframing race

I am a researcher, writer and thought leader working on racial justice. I am the Founder and Director of Reframing Race and have written extensively on racism, including the report It Takes a System (ROTA, 2021) on systemic racism. I am the co-creator of the Home Truths and Home Truths 2 projects, examining the problem of civil society racism and advancing serious solutions.



Nina Kelly

Day 1: Reframing race

I am a strategic communications expert with more than fifteen years of experience working with social justice initiatives. I am the Director of Content and Communications for Reframing Race, and formerly led communications for the Runnymede Trust and the Human Dignity Trust. I have a background in journalism with by-lines in The Guardian, the Independent and Time Out, among others. Having completed a Master's in Creative Writing at the University of Cambridge, I am now writing my first novel.



Katherine Corr

Day 2: Qualitative accelerator

I have been the EDI and Athena Swan facilitator for the Medical Sciences Division since 2017, with a strong focus on supporting departments to identify appropriate and data-informed areas for action, and monitoring impact and progress. Most recently, a significant portion of the divisional EDI Action Plan is focused on building skills and capacity for good practice across the division by providing high quality training and support for EDI facilitators, HR staff, and other stakeholders. Data is our biggest facilitator and our biggest barrier at this institution; the better we can marshal it, the better and more impactful our practice can become.



Ivona Hideg

Day 2: Parental leaves and impact on women's and men's careers

I am Associate Professor of Organisation Studies at Saïd Business School and a Fellow at Jesus College. My main programme of research includes workplace EDI. I focus on gender in my work, but also examine issues surrounding race, ethnicity, language and accent. My work has provided important insights for leaders, organisations and governments on how to effectively manage and leverage an ever increasingly diverse workforce to thrive in today's global economy. I was appointed as a Research Fellow with Women and Public Policy Program (WAPPP) at the Harvard Kennedy School at Harvard University in 2019. This fellowship recognised the contributions of my work for public and government policy making. I also served as Associate Editor at Academy of Management Journal and I currently serve on the Methods Advisory Panel at Administrative Science Quarterly. I received a PhD in Organizational Behaviour and Human Resource Management from the Rotman School of Management at the University of Toronto. Finally, but equally important I am a proud mom of two young children!



Pavel Ovseiko

Day 2: Impact pathway analysis of action and outcomes in Athena Swan Silver and Gold applications

I am a Principal Investigator and Senior Research Fellow at the Radcliffe Department of Medicine (RDM). I lead a multi-disciplinary programme of research and policy advocacy on gender equity, diversity and inclusion across medical and social sciences. I serve on the RDM EDI Committee, the UK Advance HE Athena Swan Governance Committee, the UK National Institute for Health and Care Research (NIHR) Race Equality Public Action Group, and the European Association of Science Editors' Equity, Diversity and Inclusion Committee.

Learn more about me and my work here:
www.rdm.ox.ac.uk/people/pavel-ovseiko



José Rojas Alvarado

Day 2: Beyond planning

I am a Costa Rican based in the UK. I studied Political Sciences at the Universidad de Costa Rica and did an MSc in International Development at the University of Bristol. My career spans academia and international development, with my current role in the Policy Engagement Team at the University of Oxford. Previously, I worked with the Inter-American Development Bank in Costa Rica on a project aimed at reducing youth criminality in vulnerable communities. I also lecture in development studies in Latin America and am a member of the World Economic Forum's Global Shapers youth group. Outside of work, I'm a devoted coffee enthusiast.



Laura Jones

Day 2: Equality impact assessments

I joined the EDU in July 2023, as Equality Advisor for Insights and Engagement, and have worked at the University since 2014. My responsibilities include the Public Sector Equality Duty, where I have responsibility for co-ordinating and drafting the annual Equality, Diversity & Inclusion report, sharing the progress made towards the University's Equality Objectives and advancing equality more broadly. I also manage the University's Staff Experience Survey.



Joanna Kemp (She/They)

Day 2: Equality impact assessments

I joined the EDU in August 2023 as the EDI Programme Manager, where it is my role to develop and oversee delivery of the EDI Strategic Plan for the collegiate University (2024–2027). This work recognises that having an inclusive culture in which everyone can grow and flourish is essential to our continued success as a world-leading institution. Therefore, it is vital that at Oxford University, everyone 'does inclusion'. I have worked in widening participation, community engagement and EDI for eight years and hold a PhD in Classics and Ancient History from the University of Warwick.



Steph Perrin

Day 2: Equality impact assessments

I play a key role in shaping and delivering plans to strengthen EDI for the University's Agile Initiative (2022–2027). Funded by the Natural Environment Research Council, Agile aims to develop policy-relevant, interdisciplinary research for evidence-based decision making in the field of environmental science. My work on EDI spans Agile's research, capacity development, outreach, communications, and monitoring and evaluation. I have over eight years of experience in international and community development and hold a master's degree in international studies from Simon Fraser University.

Introduction

The EDI Conference Organising Committee



Maddie Mitchell (She/Her)

Co-Chair of EDI CoP and Chair of the Organising Committee

I am the Leadership Development Officer in the Medical Sciences Division and have previously worked as the Wellcome EDI Officer.

I have worked to bring the topics of research culture, leadership development and EDI closer together through the Inclusive Leadership Programme and the WIN Lab Handbook initiative. Before working at Oxford, I was in the REF 2021 Environment team at the University of Leicester, which gave me a taste of the development to be done in the realm of EDI and culture.



Laura Epton (She/Her)

Harassment Prevention Advisor, EDU

I've been passionate about EDI at the University for several years and am driven by creating organisational leadership and cultures that truly value, recognise and enable individuals to succeed at every level.

At the conference, I'm excited about creating a collaborative, thinking environment for EDI leads to explore their professional development and growth as a community, using a strengths-based approach.



Charlotte Smith (She/Her)

EDI and Strategic Projects Facilitator, RDM

My role covers equality, diversity and inclusion, with a focus on gender equality.

My responsibilities include embedding and sharing best practice, provision and analysis of qualitative and quantitative data providing evidence for the Athena Swan charter, and managing projects and events across RDM. I am based within the RDM strategic team, though I work across all RDM divisions and I'm always very happy to meet up and discuss queries and ideas.

I have worked at the University of Oxford since 2004 and have been working on Athena Swan since 2014. I am a qualified panellist for Advance HE.

I work with colleagues across the University to embed the principles of equality and diversity within policy, practice and culture.

I am a Harassment Advisor, LGBT+ Ally, Wellbeing Champion and trained Mental Health First Aider.



Machilu Van Bever Donker (She/Her)

Equality, Diversity and Inclusion Officer, Humanities

I am an EDI practitioner with a background in research on inequalities and underrepresented groups in the world of work.

I currently support Humanities faculties to identify and address areas in their practice that exclude or further marginalise underrepresented groups. I draw on quantitative and qualitative research methods to understand the context of these faculties and advise them on changes to their practice or evidence-based interventions to foster inclusion and increase the representation of women, people with disabilities, LGBTQ+ people and people racialised as Black, Asian and Minority Ethnic.

Previously, I worked as a policy advisor (race equality, religion and belief) in Oxford and at University College London. I hold a doctorate in Comparative Industrial Relations and Labour Law. One of my interests is supporting researchers to consider EDI as they design research projects, from conception of an idea (often alongside community groups), to adopting an equitable methodological and analytic approach to their study, including how best to disseminate findings beyond academia.



Elisha Ward (She/Her)

EDI Officer and Projects Manager, Social Sciences

I joined the Social Sciences Division EDI Team in September 2023. As EDI Officer and Project Manager, I manage a number of projects and initiatives in support of divisional EDI objectives.

I love accelerating progress by building on the insights and discoveries of others, so I will be paying keen attention to the research talks at the conference and taking notes on 'what works'.



Louise Cotterell (She/Her)

Equality, Diversity and Inclusion Officer,
DPAG and Sir William Dunn School

I am the EDI Officer for Sir William Dunn School of Pathology and the Department of Physiology, Anatomy and Genetics in the Medical Sciences Division. I deliver effective initiatives to improve workplace culture, with a focus on equality, diversity, and inclusion.

Prior to joining the University of Oxford, I worked as the Business Manager for the Health Services Research Unit at University of Aberdeen. My experience has given me good insights into the challenges facing staff and students in a research-intensive environment.

Safe Space Policy

It is our responsibility to create spaces, both offline and online, that are welcoming and respectful to everyone. Everyone is individually responsible for adhering to the expectations of these spaces and for checking their own behaviour.

We are dedicated to providing a harassment-free experience for all participants, regardless of both characteristics protected by the Equality Act and aspects of diversity not currently covered by the Act (e.g. socio-economic status). We do not accept harassment or intimidation of participants in any form, whether verbal, physical, or written (including on social media or by email).

If you are being harassed or intimidated, notice that someone else is being harassed or intimidated, or have any other concerns, please contact a member of the Organising Committee immediately.

If for any reason you are unwilling or unable to speak with a member of the Organising Committee, please contact harassment.line@admin.ox.ac.uk for advice.

Credit to EDIS

Schedule

Day One

Day 1 Session 1

Influencing organisational culture: a primer



Mahima Mitra

Senior Lecturer in Organisation Studies
with special reference to Inclusion

Mahima Mitra is a Senior Lecturer and an Executive Coach on the Saïd Business School's MBA Leadership Coaching Programme.

During the early stages of her career, Mahima worked for the World Bank in India. Between 2018 and 2022, she served as a researcher co-investigator at the Saïd Business School on a Wellcome Trust-funded study examining professional identity development of under-represented academics.

Find out more:

www.sbs.ox.ac.uk/about-us/people/mahima-mitra

Learning Objectives

Understand

and articulate the significance of culture in enhancing organisational EDI.

Use

cultural assessment tools to appraise your current culture and identify aspects of your aspired culture.

Develop

and articulate cultural strengths (and behaviours) that can be reinforced and those that need to be shifted / promoted to begin to influence culture.

Consider

and appreciate what can be 'changed' versus what could be 'influenced' through your work as EDI practitioners in your own organisational contexts.

Session Summary

This session aims to support EDI practitioners to build their understanding of organisational culture and introduce tools and approaches for culture change. Mahima will talk through the different ways of defining and appraising culture, and practical ways through which one might begin to influence it. Topics covered will include:

1. Culture – definitions, significance and dimensions
2. Appraising culture
3. 'Changing' versus 'influencing' culture
4. Creating a culture of inclusivity and psychological safety

References

Culture assessment tools:

Johnson, G., Scholes, K., & Whittington, R. (2009). Culture and strategy (chapter 5). In G. Johnson, K. Scholes and R. Whittington Fundamentals of strategy. Pearson Education. [Especially section 5.3].

MindTools (2024). The cultural web: Aligning your organisation's culture with strategy. Available from <https://www.mindtools.com/a8im94b/the-cultural-web>

OCAI (2024). Organizational Culture Assessment Instrument online. Available from <https://www.ocai-online.com> [Recommended version - OCAI One for individuals with one personal culture profile].

Case studies on culture change:

CIPD (2011). Developing organisation culture Six case studies. Available from https://www.cipd.org/globalassets/media/knowledge/knowledge-hub/reports/developing-organisation-culture_2011-six-case-studies_tcm18-10885.pdf London: CIPD.

Metz, I., & Kulik, C. T. (2008). Making public organizations more inclusive: A case study of the Victoria Police Force. Human Resource Management: Published in Cooperation with the School of Business Administration, The University of Michigan and in alliance with the Society of Human Resources Management, 47(2), 369-387.

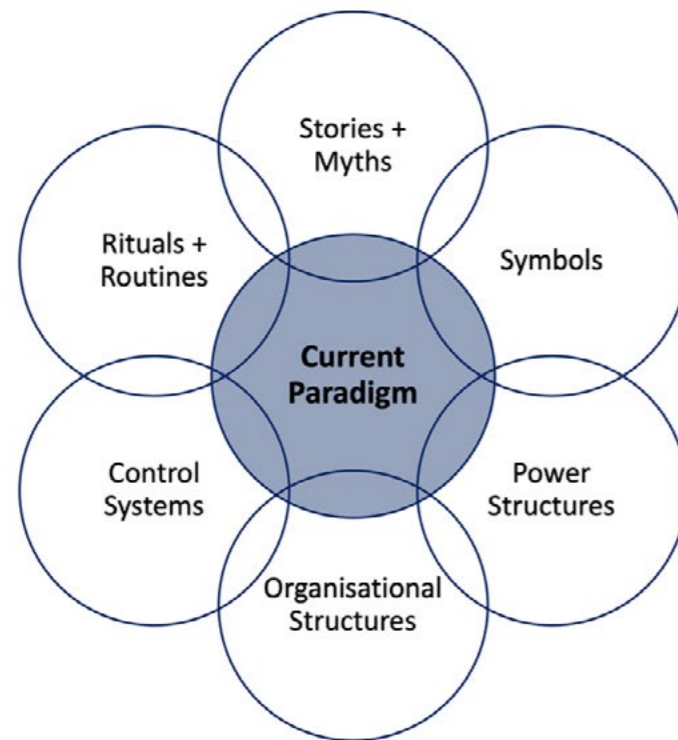
Influencing culture:

Barsade, S. (2018). Five steps for managing culture change. Wharton@Work Nano Tools for Leaders. Available from <https://executiveeducation.wharton.upenn.edu/wp-content/uploads/2018/03/1409-Managing-Culture-Change.pdf>

Cox Jr, T. (2001). Creating the multicultural organization: A strategy for capturing the power of diversity (Vol. 6). John Wiley & Sons. [Particularly Chapter 2].

Harrison, S., & Rogers, K. (2024). Building culture from the middle out. MIT Sloan Management Review. Companion Article Pack, 5. Available from <https://www.google.com/search?client=safari&rls=en&q=Building+culture+from+the+middle+out&ie=UTF-8&oe=UTF-8>

The Culture Web



(Johnson, 1988)

About this template

This template can be used as a tool to explore the elements that together create the current cultural paradigm of an organisation.

For each of the 6 elements of The Culture Web, questions are provided to help guide your reflection. Write down notes and ideas in the textbox provided for each of the 6 elements.

Stories + Myths

The stories and myths are versions of past events that are told about the organisation.

Use the following questions to guide you:

- What events (both successes and failures) do people talk about?
- Who are the heroes/heroines in these stories?
- What stories are shared with new starters?
- What do these stories say about the values of the organisation?

Symbols

Symbols visually represent the organisation.

Use the following questions to guide you:

- Are there formal or informal dress codes?
- What is the logo and what does it represent?
- Are there visual cues in the physical office space?
- What visuals are most often associated with the organisation?

Power Structures

Power structures are real and social power and influence over decisions, directions and strategy.

Use the following questions to guide you:

- Who has real power to make decisions?
- Who has perceived power to make decisions?
- Where in the organisation is there perceived unfairness?

Organisational Structures

Organisational structures are both formal and informal structures and relationships that indicate whose contributions are valued

Use the following questions to guide you:

- Where are there formal lines of authority (e.g., matrix, direct or across teams)?
- Are there ways that the organisational chart does not map to the reality of influence?
- How clear are roles and responsibilities?

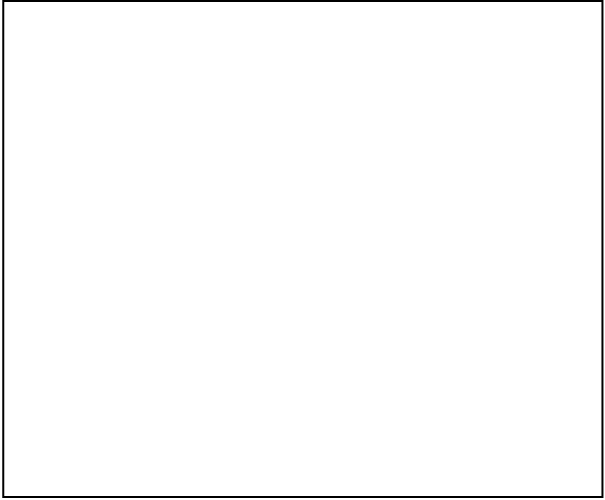


Control Systems

Internal control systems that are used to manage the organisation.

Use the following questions to guide you:

- What is the incentive structure?
- What is the punishment structure?
- What systems are in place around salaries, bonuses and increases?
- What performance management systems are in place?

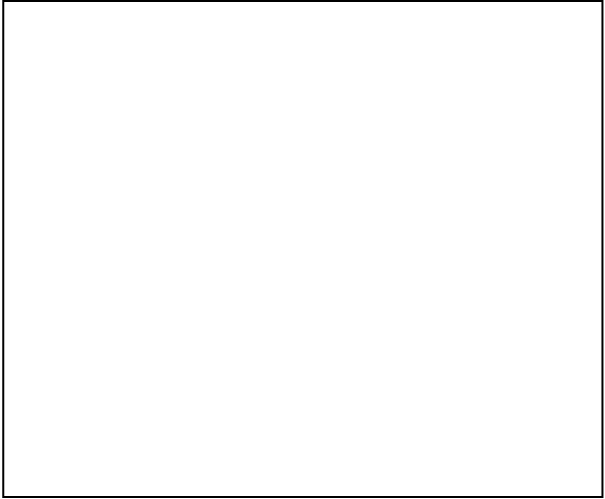


Rituals + Routines

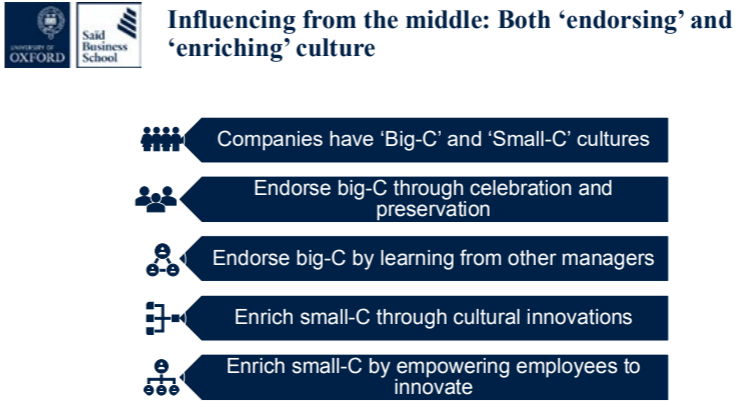
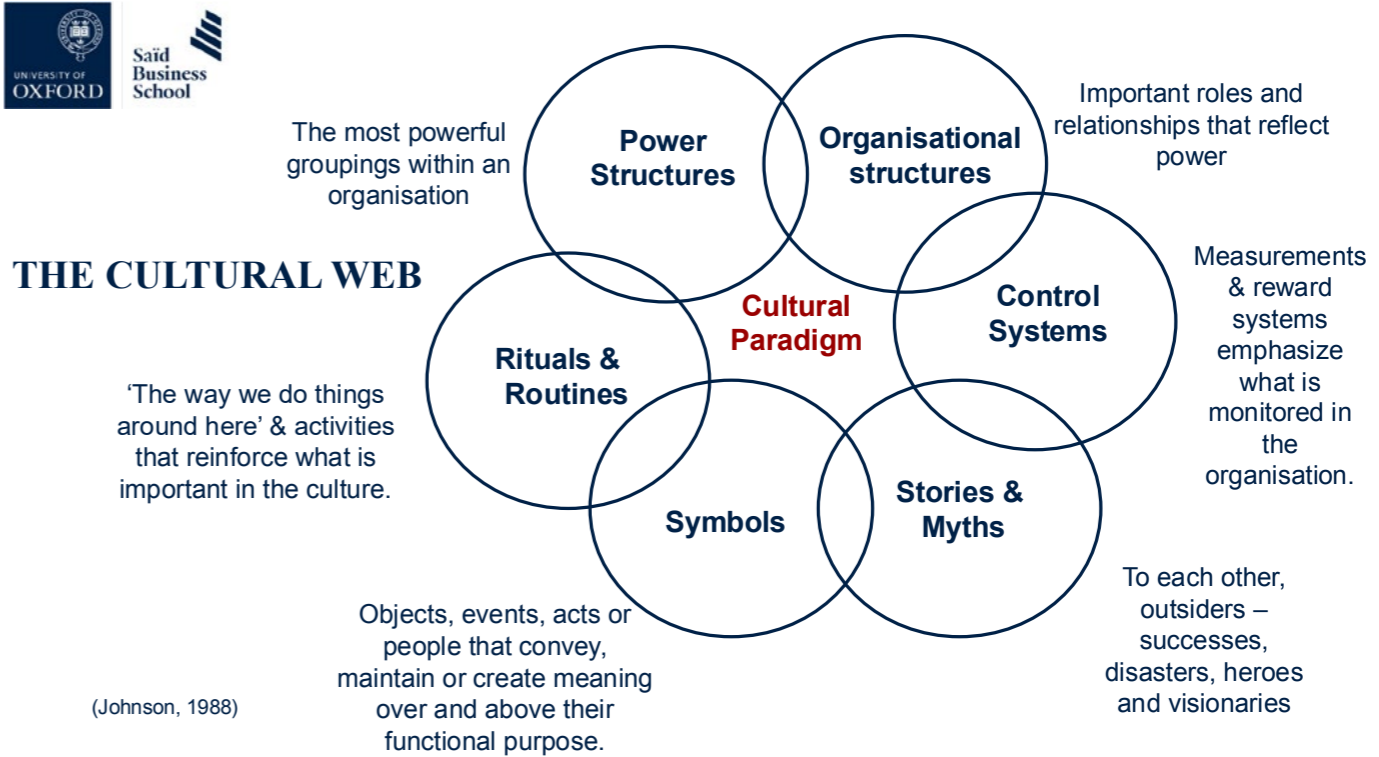
Rituals and routines are behaviours and rules that signal importance or are valued by the organisation.

Use the following questions to guide you:

- Are there certain behaviours that are informally valued by management?
- Are there any unspoken behavioural expectations?
- Are there any weekly/termly rituals?
- What would be immediately obvious if it changed?



Key Slides & Diagrams



(Harrison and Rogers, 2024)

Worksheet **Influencing organisational culture: a primer**
Session 1

1. What is the biggest takeaway for you from this session today?

2. What cultural strengths have been highlighted by your analysis of your current organisational culture?

3. What actions or behaviours could you encourage and reinforce to nudge your organisational culture towards greater inclusiveness?

4. What new behaviours or beliefs might you need to promote?
Who could be your ally in this process?

Day 1 Session 2

Leading from where you stand: EDI leadership for every level



Marilyn Verghis
Deputy Head of the Equality and Diversity Unit

Marilyn Verghis (she/her/hers) is the Deputy Head of the Equality and Diversity Unit, and was previously the EDU Policy Advisor for Race, Religion and Belief, working on the University's Race Equality Strategy.

Prior to moving to Oxford, Marilyn worked in EDI in Canada across higher education, healthcare, government and non-profit sectors, and as an external consultant on workplace EDI learning and leadership for a range of private sector firms across industries.

Learning Objectives

Explore

the professionalisation of EDI.

Consider

organisational context.

Recognise

the range of views connected to issues of EDI.

Consider

the role of EDI professionals in organisations.

Session Summary

It is often said that leaders can have an outsized impact on the success of equality, diversity & inclusion work in organisations, but what is the role of EDI professionals? In this interactive session we will explore the unique challenges and opportunities of being an EDI professional and how we can leverage our organisational context, strengthen our credibility and inspire connection to demonstrate that EDI is for everyone.

Further Reading

Deep Diversity, Shakil Choudhary (Greystone Books, 2021)

DEI Deconstructed, Lily Zheng (Berrett-Koehler Publishers, 2022)

The 4 Stages of Psychological Safety, Timothy R. Clark (Berrett-Koehler Publishers, 2020)

Worksheet
Session 2

**Leading from where you stand:
EDI leadership for every level**

1. What is your key takeaway from this session?

2. What is your unique organisational context for EDI?

3. Is there an area of your professional practice that you are looking to strengthen?

4. What does building connection look like for you?

Day 1 Session 3

Having impact through professional practice: how do we, as EDI leads, continue to develop our practice?



Laura Epton
Harassment Prevention Advisor

I've been passionate about EDI at the University for several years and am driven by creating organisational leadership and cultures that truly value, recognise and enable individuals to succeed at every level.

In my central role, I lead policy and strategic projects aimed at preventing bullying and harassment, drawing on my experience in departments working in partnership with senior leaders and team leads to advance EDI in teaching and research. Committed to continuous learning, I'm currently training to become a professional coach, accredited with the EMCC.



Sarah Lewis
Learning, Leadership and Organisational Development Consultant

I am an insightful change and organisational development practitioner, with a practical and empathic approach.

I have a BSc in Psychology and an MA in Organisation Studies from Warwick Business School. I enjoy working with individuals, groups, teams and organisations to help to make progress on the things that matter to them. I have over twenty years of experience working in central government, local government, higher education and the private sector.

Session Summary

Learning Objectives

Create

a collaborative, thinking space to identify strengths and professional development opportunities.

"The quality of everything we do depends on the quality of the thinking we do first." Nancy Kline (Time to Think, Cassell, 2002)

The session aims to create space and time for EDI professionals and others to focus on their professional practice by building an understanding of strengths and opportunities for professional development. The session is founded on the components of the thinking environment developed by Nancy Kline, to create a collaborative space in which to think this through, so that we as individuals and a community can focus on our professional growth and advance EDI at the collegiate University.

We will start by exploring why professional practice matters to EDI professionals and the EDI community, and then in small groups discuss the key strengths, skills and behaviours of an Oxford EDI Professional and the opportunities to continue to develop our practice in EDI. The session will end with reflective time to consider what it means for you as an individual: What strengths do you bring to EDI? What areas do you want to develop?

Introduction to Professional Practice

Professional practice is the application of specialised knowledge, skills and ethical standards within a particular field, industry or niche. It describes the activities which will help you apply your knowledge to your industry, job role or workplace. It can be maintained through:

- Continuous learning: Staying updated with the latest trends and developments
- Strong professional networks: Staying connected to fellow professionals

Thinking environment

“The quality of everything we do depends on the quality of the thinking we do first.

The quality of our thinking depends on the way we treat each other while we are thinking and the attention with give to others in listening.” Nancy Kline (Time to Think)

Visit www.timetothink.com/thinking-environment/ for an overview of Nancy Kline’s Components of a Thinking Environment

A strengths-based approach

Visit Dr Lucy Ryan’s article (<https://mindspring.uk.com/blogs/news/crafting-a-strengths-introduction>) and Amazing if (www.amazingif.com/squiggly-career-summer-school-strengths/) to learn more.

Silent coaching

Search for *silent coaching and the GROW model* at open.ac.uk to explore a more detailed set of questions developed by the Open University to help you identify what you’d like to achieve and how you’d like to move towards your goal.



Worksheet Session 3

Having impact through professional practice: how do we, as EDI leads, continue to develop our practice?

1. What strengths do you bring to EDI?

2. What areas do you want to develop?

Day 1 Session 4

Reframing race: bringing audiences towards anti-racism and EDI



Sanjiv Lingayah

Director

Sanjiv is a researcher, writer and consultant working on racial justice.



Nina Kelly

Director of Content & Communications

Nina is a strategic communications consultant with more than fifteen years of experience working with and for social justice initiatives.

Find out more:

www.reframingrace.org/about/who

Learning Objectives

You will gain insights into how audiences (including within the institution) think and feel on 'race', racism and EDI. You will develop knowhow on communicating on anti-racism and EDI in ways that can more effectively build buy-in from general audiences.

About Reframing Race

Reframing Race is a UK-based non-profit research-based initiative that exists to change the public conversation on racism in order to build an anti-racist future.

Session Summary

Why is it sometimes hard to be heard on 'race', racism and EDI? How does a general audience experience words and ideas that centre change? And what kind of framing, language and metaphors help to call audiences towards a future in which all people can thrive?

Engage with these questions and more with Dr Sanjiv Lingayah and Nina Kelly from research initiative Reframing Race. Sanjiv and Nina will draw on insights from four years of in-depth, stakeholder-led work, to show what did and didn't work in the world's largest anti-racist message test. Participants will learn where there is resistance to change and how to speak more effectively to bring a general audience towards supporting anti-racist and meaningful EDI work.

References

Nina Kelly's Guardian comment (December 2023). <https://www.theguardian.com/commentisfree/2023/dec/28/meaningful-debate-racism-we-asked-20000-people>

Changing the Conversation: An animated film on why 'race' needs reframing. <https://reframingrace.org/about/change/>

Contains Strong Language (July 2023), offers evidence-based practical advice on how to speak clearly and powerfully about racism. <https://www.reframingrace.org/data/csl>

Testing Times (December 2022), a report of key findings from a quantitative study testing over two dozen messages with 20,000 people in England and Scotland, carried out by Savanta. <https://reframingrace.org/data/testing-times/>

An introduction to framing by the FrameWorks Institute. <https://www.frameworksinstitute.org/tools-and-resources/framing-101/>

**Worksheet
Session 4**

**Reframing race: bringing audiences towards
anti-racism and EDI**

1. What informs your approach when you are messaging on anti-racism and EDI?

2. How do Reframing Race's findings (<https://reframingrace.org/data/testing-times/>) on audience thinking match your experience communicating in your work, e.g. trying to advance support for EDI?

3. Which elements of your communication (internal or external) seemed to have 'cut through' and generated support for your work?



4. Which of your key ideas and initiatives could benefit from reframing in order to land with more power?

Empty rectangular box for writing answers to question 4.

Schedule

Day Two

Day 2 Session 5

Qualitative accelerator: building qualitative research capacity for EDI action planning



Katherine Corr
Athena Swan Advisor and Facilitator

My role is to advise and support all sixteen departments of the Medical Sciences Division as they apply for their Athena Swan renewals over the coming few years.

I assist our departments in the Division in promoting gender equality and preparing applications for Athena Swan awards. This includes providing staff and student data; administering surveys and focus groups; running workshops to share best practice; and coordinating initiatives.

Find out more:
www.medsci.ox.ac.uk/for-staff/staff/katherine-corr



Mahima Mitra
Senior Lecturer in Organisation Studies
with special reference to Inclusion

Mahima Mitra is a Senior Lecturer and an Executive Coach on the School's MBA Leadership Coaching Programme.

During the early stages of her career, Mahima worked for the World Bank in India. Between 2018 and 2022, she served as a researcher co-investigator at the Saïd Business School on a Wellcome Trust-funded study examining professional identity development of under-represented academics.

Find out more:
www.sbs.ox.ac.uk/about-us/people/mahima-mitra

Learning Objectives

Appraise

existing data or key pain points to identify a research focus for a qualitative project.

Develop

and articulate 2–4 key research questions on an identified topic.

Develop

key criteria and the most appropriate techniques for identifying the participant sample.

Identify

the most relevant and practical tools for gathering data, bearing in mind any key constraints such as time or financial resources.

Consider

and uphold key quality standards in designing your study.

Session Summary

This session is the first in a series of planned sessions linked to building qualitative research capacity among diversity practitioners to meaningfully examine and engage with EDI challenges and initiatives. The session will be jointly facilitated by Mahima and Katherine, who will walk through the key stages in designing a qualitative research study, including practical considerations. Topics covered will include:

1. Introduction to and context for undertaking qualitative research
2. Developing a research focus
3. Drafting research questions
4. Generating a sample and selecting suitable sampling approaches
5. Determining the best tools or approaches to gather data
6. Key quality criteria: trustworthiness and dependability

Key Slides & Diagrams

When is qualitative research appropriate?



Key considerations

1

Framing questions

- Open-ended, exploratory questions / 'how' and 'why'
- Relevant to the overall goal
- Clear and focused
- Analytical rather than descriptive
- Feasible to research / answer given the resources

2

Reshaping / refining questions

- When? E.g., pilot, mid-project
- What for?
 - To narrow – e.g., from a 'academic staff', to 'fixed-term academic staff'
 - To broaden - e.g., from singular (e.g., 'fixed term-academic staff') to a comparison (e.g., female versus other fixed-term academic staff)

3

The number of questions

- Resources and time
- Subject matter / scope – e.g., the same, or two or more distinct phenomena?

Determining a sample size



(Luborsky and Rubinstein, 1995)

Qualitative tools and typical focus

Tool	Focus
Interviews / mixed surveys	Individual attitudes, beliefs or experiences, sensitive issues, complex contexts
Observations	Behaviour in context; interactions and communication; silent social norms, values or dynamics; use of space
Focus groups	Range of views on specific topics, other people's experiences, community perspectives for discussion and validation (not suitable for personal information)
Documentary analysis	Personal documents, public records, organisational artifacts (flyers, training materials, handbooks)

References

For the end-to-end qualitative research process:

- Aurini, J. D., Heath, M., & Howells, S. (2022). *The how to of qualitative research* (2nd edition). Sage.
- Gaudet, S., & Robert, D. (2018). *A journey through qualitative research: From design to reporting*. Sage.

For qualitative research design:

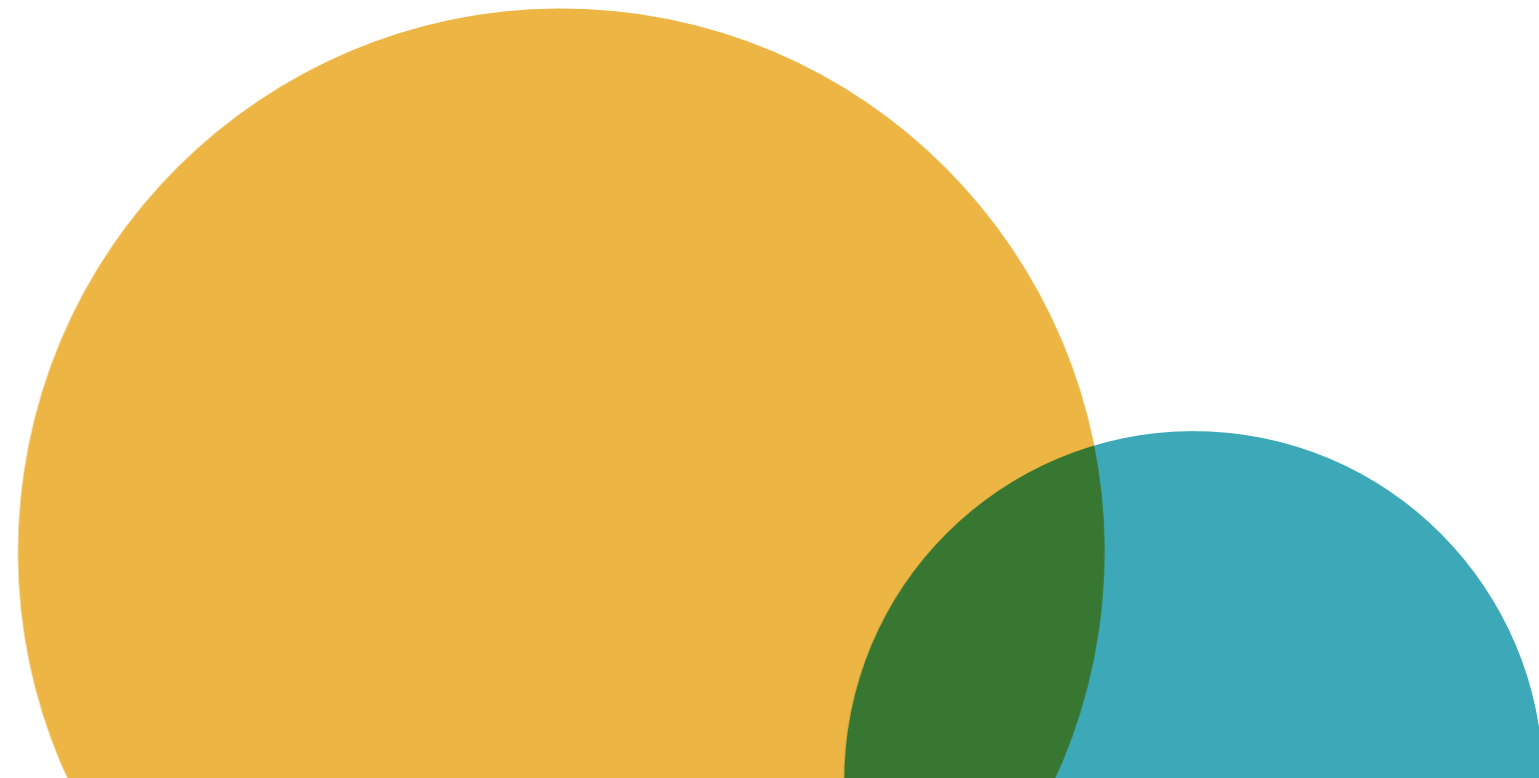
- Marshall, C., & Rossman, G. B. (2014). *Designing qualitative research*. Sage publications.
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For practical guidance on conducting qualitative research:

- Frankel, R. M., & Devers, K. J. (2000). Study design in qualitative research—1: Developing questions and assessing resource needs. *Education for health*, 13(2), 251-261.
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- Office for Health Improvement and Disparities (2010, 2 June). *Guidance: Mixed Methods Study*. Available from <https://www.gov.uk/guidance/mixed-methods-study>
- Office for Health Improvement and Disparities (2020, 30 January). *Guidance: Focus group study: qualitative studies*. Available from <https://www.gov.uk/guidance/focus-group-study-qualitative-studies>
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- Turner III, D. W. (2010). Qualitative interview design: A practical guide for novice investigators. *The qualitative report*, 15(3), 754.

For guidance on conducting evaluations of initiatives / programmes:

- Office for Health Improvement and Disparities (2020, 2 December). *Guidance: Design your evaluation: evaluating digital health products*. Available from <https://www.gov.uk/guidance/design-your-evaluation-evaluating-digital-health-products>
- Office for Health Improvement and Disparities (2020, 30 January). *Guidance: Carry out your evaluation: evaluating digital health products*. Available from <https://www.gov.uk/guidance/carry-out-your-evaluation-evaluating-digital-health-products>





Worksheet
Session 5

Qualitative accelerator: building qualitative research capacity for EDI action planning

1. What is the biggest takeaway for you from this session today?

--

2. In your own role, what is a current EDI challenge or need that you could meaningfully examine through qualitative research?

--

3. If you had to start designing a qualitative research project next week, what are some key actions that you would take?

--

4. What are the most important learning needs that have been identified for you through this session?

--

Day 2 Session 6

Parental leave and impact on women's and men's careers



Ivona Hideg

Associate Professor of Organisation Studies

Ivona is a passionate researcher and educator. Her main programme of research includes workplace EDI.

In her work, she focuses on gender, but also examines issues surrounding race, ethnicity, language and accent including the intersection of various identities that we all hold. She is also a Fellow at Jesus College at the University of Oxford.

Find out more:

www.sbs.ox.ac.uk/about-us/people/ivona-hideg

Learning Objectives

Present

research-based evidence of how parental leaves influence **women's** careers.

Present

research-based evidence of how parental leaves influence **men's** careers.

Discuss

strategies to manage parental leaves and parenthood and careers.

Session Summary

Parental leaves are critical for gender equity and recently many countries have been encouraging longer parental leaves. Yet, past research shows that parental leaves can have unintended negative career impacts, especially for women. In this talk, Dr. Hideg will present evidence-based understanding of how parental leaves and more broadly parenthood impact careers of both women and men and how the impact differs for women and men. Next, she will discuss strategies for managing taking much-needed parental leaves and having successful careers.

References

- Dickens, M., & Mangino, K. (2023). How paternity leave helps dads' brains adapt to parenting. Harvard Business Review. <https://hbr.org/2023/11/how-paternity-leave-helps-dads-brains-adapt-to-parenting>
- Hideg, I., Krstic, A., Trau, R.N.C., Zhan, Y., & Zarina, T. (in press). Agency penalties from taking parental leave for women in men-dominated occupations: Archival and experimental evidence. Sex Roles.
- Hideg, I., Krstic, A., Trau, R. N. C., & Zarina, T. (2018). Do longer maternity leaves hurt women's careers. Harvard Business Review. <https://hbr.org/2018/09/do-longer-maternity-leaves-hurt-womens-careers>
- Hideg, I., Krstic, A., Trau, R. N. C., & Zarina, T. (2018). The unintended consequences of maternity leaves: How agency interventions mitigate the negative effects of longer legislated maternity leaves. Journal of Applied Psychology, 103(10), 1155-1164. <https://doi.org/10.1037/apl0000327>

Worksheet
Session 6

**Parental leave and impact on women's
and men's careers**

1. Reflect on current strategies, practices, and policies in your organisation in regards to parental leave and support that parents who take parental leaves receive in your organisation.

2. What do you think you can do in your role to minimise negative impacts of parental leaves that women tend to incur?

3. More broadly, what do you think you can do in your current role to support new parents in their career goals?

Day 2 Session 7

Impact pathway analysis of actions and outcomes in Athena Swan Silver and Gold applications



Pavel Ovseiko

Principal Investigator/Senior Research Fellow,
Radcliffe Department of Medicine

Pavel leads a multi-disciplinary programme of research and policy advocacy on gender equity, diversity, and inclusion across medical and social sciences.

He serves on the RDM EDI Committee, the UK Advance HE Athena Swan Governance Committee, the UK National Institute for Health and Care Research (NIHR) Race Equality Public Action Group, and the European Association of Science Editors' Equity, Diversity and Inclusion Committee.

Find out more:

www.rdm.ox.ac.uk/people/pavel-ovseiko

Learning Objectives

Describe

areas of demonstrated success and impact in Athena Swan Silver and Gold university and departmental applications.

Identify

key impact pathways based on the qualitative analysis of actions and outcomes in Athena Swan Silver and Gold university and departmental applications.

Critically discuss

the complexity of Athena Swan action plans with implications for their evaluation and implementation.

Session Summary

Background

This session is based on the research conducted in support of Advance HE's ambition to develop a theory of change for the transformed Athena Swan (AS) Charter.

It attempts to establish the contribution of actions to outcomes/impacts (i.e. impact pathways) based on the information provided in AS Silver and Gold university and departmental applications.

Methods

Qualitative thematic analysis of AS Silver and Gold applications submitted under the transformed AS guidelines between Jan 2022 and Sept 2023. These included: all university Silver and Gold (n=8, 7 Silver, 1 Gold) applications and all research institute (RI) Silver and Gold applications (n=1; 1 Silver), and a proportionate 10% random sample of departmental Silver (n=9) and Gold (n=2) applications.

Qualitative data on key priorities and successes as well as contributing actions and outcomes from completed action plans were extracted into MS Excel, coded, and analysed thematically.

Results

First, according to the RAG ratings, 67% of planned actions were fully completed (green), 25% partially completed (amber), 7% not completed (red), and 2% superseded or taken out. There was no significant difference in the percentage of completed actions between Silver and Gold applications.

Second, there were notable differences in how universities/RIs and departments formulate their key priorities (proxy for impact). While approximately 50% of key priority areas were common (Embedding AS into culture, Gender balance on committees, Flexible working/career breaks, Intersectionality, Career development, Key career transition points), several key priorities were specific to universities/RIs (Senior under-representation, Gender pay gap, Bullying and harassment, PTO staff) and to departments (Students, COVID responses).

Third, thematic analysis revealed nine most common areas of demonstrated success/impact: Improved gender representation across career pipeline/transition points; Flexible and family-friendly working; Improved gender representation in senior roles;

Reduced occupational gender segregation of PTO staff across job families; Improved gender equity in career development; Reduced gender segregation of students across disciplines; Improved gender balance on committees; Reduced gender pay gap; Reduced bullying and harassment. Each area of demonstrated success/impact is presented with a summary of outcome measures and contributing actions.

Fourth, each area of demonstrated success/impact usually had multiple contributing actions, and often the same actions contributed to several areas of demonstrated success/impact. Contributing actions often depended on other actions and on the local context.

Fifth, it was impossible to determine the comparative effectiveness of different actions because outcome measures and contributing actions were not comparable across different action plans. How similar actions were defined, measured, and implemented depended on the local context and varied significantly between different applications.

Conclusions

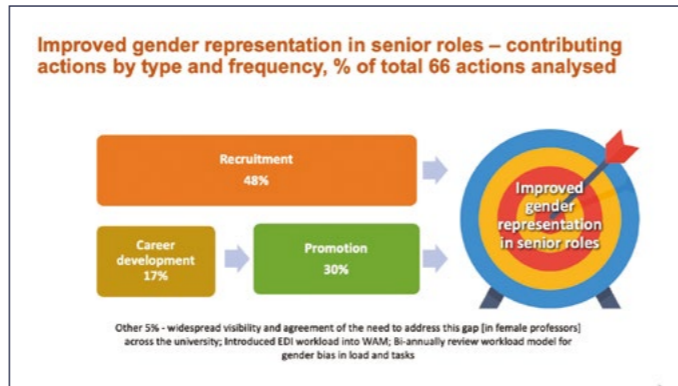
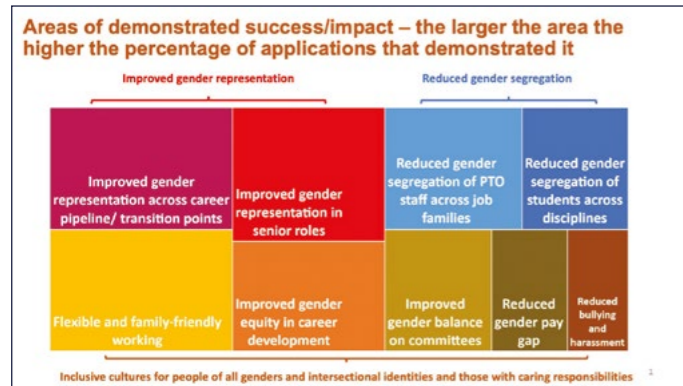
This analysis provides an overview of impact pathways in the current AS Silver and Gold applications.

It highlights the complexity of action plans in terms of (1) multiple actions and areas of intervention, (2) the non-linearity of interventions, and (3) impact in terms of contribution to change and improved conditions to foster change. The complexity of action plans makes successful implementation and evaluation of action plans dependent on the capabilities and resources of local self-assessment teams (SATs). Professional development of SAT members and adequate resources for the development and implementation of action plans are important avenues for maximising their impact.

References

- Kalpazidou Schmidt, E., Ovseiko, P.V., Henderson, L.R. et al. Understanding the Athena SWAN award scheme for gender equality as a complex social intervention in a complex system: analysis of Silver award action plans in a comparative European perspective. *Health Res Policy Sys* 18, 19 (2020). <https://doi.org/10.1186/s12961-020-0527-x>
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- Ovseiko, P. V., Pololi, L. H., Edmunds, L. D. et al. (2019). Creating a more supportive and inclusive university culture: a mixed-methods interdisciplinary comparative analysis of medical and social sciences at the University of Oxford. *Interdisciplinary Science Reviews*, 44(2), 166–191. <https://doi.org/10.1080/03080188.2019.1603880>

Key Slides & Diagrams



Case study – University of Surrey

Rationale: Women over-represented at lower levels and under-represented at higher levels - there should be gender balance at all levels across organisation.

Actions:

- Demystifying promotion workshops for women only
- Promotion viewed with gendered lens
- Covid included as mitigating factor in promotion forms
- Appraisal scores validated by gender to ensure fairness
- Diversity 200 recruitment campaign
- No male only shortlists for senior roles
- Introduced EDI workload into Workload Planning Model

Facilitators

- EB identifying Senior women in leadership as a priority
- Continued messaging from EB that gender balance in leadership is valued and needed
- Additional input from Head of Reward and HR Business Partners in appraisal and promotion

Outcomes:

- The proportion of female Professors has increased from 24% (2017/18) to 29% (2021/22).

Complexity makes implementing AS action plans harder than rocket science



Slide credit: Greenhalgh T "implementing change in complex systems", Oxford, 15 May 2019

Worksheet Session 7

Impact pathway analysis of actions and outcomes in Athena Swan Silver and Gold applications

1. How do we share best practice and evidence on the effectiveness of interventions if interventions are described and evaluated differently in different action plans?

2. How could you use the evidence on the effectiveness of interventions to challenge an organisation or department to agree actions that will lead to further gender equality or continue to foster broader inclusion in their working environments?

3. Are there other areas in your workplace where impact pathways of EDI or Athena Swan interventions could be used to encourage organisational change?

Day 2 Session 8

Beyond planning: monitoring, evaluation and learning



José Rojas Alvarado

OPEN Learning & Development Manager

As a member of the University-wide Policy Engagement Team, which is hosted by the Division, I am the team's first point of contact for all enquiries related to learning and development opportunities and resources.

You can find out more about these and the Oxford Policy Engagement Network (OPEN)

www.ox.ac.uk/policyengagement

Learning Objectives

Gain

a better understanding of the foundational concepts of monitoring and evaluation, including the principles and methodologies used to assess EDI outcomes.

Explore

the basics of Theory of Change and how it can be applied to EDI initiatives, fostering a new perspective on approaching MEL in your EDI work.

Session Summary

Effective Monitoring, Evaluation, and Learning (MEL) processes are crucial for improving our work and demonstrating impact. Within complex systems such as those in EDI contexts, it's important to consider what tools and resources we can use – and how we can use them effectively.

To help EDI practitioners address these questions, this session focuses on the foundational concepts of MEL and introduces the Theory of Change as a relevant approach for strategising and evaluating EDI efforts. We'll explore how these approaches can help navigate the complexities of EDI work and foster more effective planning and evaluation.

This introductory session will provide participants with insights into how Theory of Change can inform their thinking about MEL for EDI, encouraging a more strategic and reflective approach to their day-to-day work.

References

Better Evaluation (2024). Outcome harvesting.

Government Analysis Function (n.d.) The Theory of Change Process – Guidance for Outcome Delivery Plans

Hivos (2015). Theory of Change Thinking in Practice.

Intrac (2017). Outputs, Outcomes and Impact.

Ocean Community Empowerment and Nature (2024). Monitoring, Evaluation and Learning Guidance: a guide for partnership grants.

Strengthening responses to dementia – StRiDE (2019) Theory of Change Workshops: guidance and resources.

USAID Jordan (2021). Monitoring, Evaluation and Learning Activity.

Please see a compilation of examples of real Theories of Change: <https://assets.aecf.org/m/resourcedoc/aecf-theoryofchange-examples-2022.pdf>

Worksheet
Session 8

**Beyond planning: monitoring, evaluation
and learning**

During the session

1. **Your Current MEL Approach:** Think about how you currently track work progress:
- Do you have a specific way to monitor what's happening?
 - How do you know if your efforts are making a difference? Write down what you're doing now, even if it's very informal.

2. **Dream Big About Change (Impact):** Imagine it's five years from now and your EDI efforts have been incredibly successful. What does your workplace or community look like? How have things improved? Be specific and don't be afraid to dream big!

3. **Planning Your Path (Activities):** Now, let's think about how to get to that dream. List three activities or initiatives you could do that would help make your dream a reality. These could be training sessions, policy changes, community events, or anything else you think would help. Briefly explain why you think each activity would make a difference.

4. **Spotting the Signs of Progress (Outputs and Outcomes):** For the activities you listed:
- What are the immediate, tangible results (outputs) of these activities?
Example: "25 managers completed unconscious bias training"
 - What longer-term changes (outcomes) would indicate progress towards your EDI goals? Example: "Increased representation of diverse candidates in leadership positions"
- Reflect on the difference between outputs and outcomes in your EDI work. How does understanding this difference shape your approach to measuring progress?

After the session

<p>1. How might a Theory of Change approach help you identify key information to collect for your current work on EDI?</p>

<p>2. What information would you need to collect? (e.g., survey responses, attendance numbers, etc)</p>

<p>3. Who are the essential stakeholders you'd involve in developing and reviewing your Theory of Change for your work? How might involving these individuals or groups enhance your approach to measuring EDI success?</p>

<p>4. How has this exercise changed how you think about measuring the impact of your EDI work?</p>

<p>5. What's one new idea you've had about improving how you track and learn from your EDI efforts?</p>

Day 2 Session 9

Equality impact assessment



Stephanie Perrin

Equality, Diversity and Inclusion Officer

I play a key role in shaping and delivering plans to strengthen EDI for the University's Agile Initiative (2022–2027). Funded by the Natural Environment Research Council, Agile aims to develop policy-relevant, interdisciplinary research for evidence-based decision making in the field of environmental science. My work on EDI spans Agile's research, capacity development, outreach, communications, and monitoring and evaluation.



Laura Jones

Equality Advisor (Insight & Engagement)

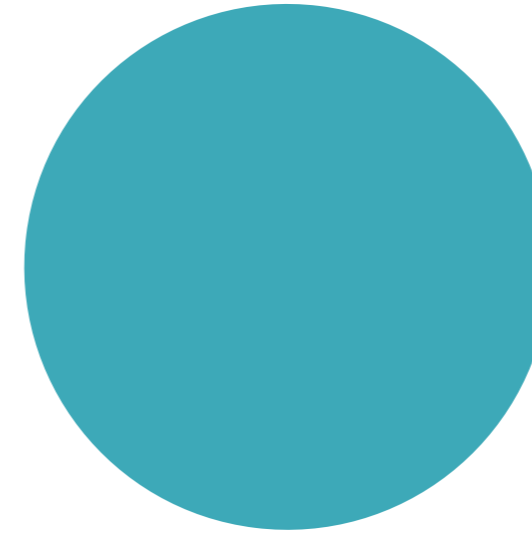
I joined the EDU in July 2023, as Equality Advisor for Insights and Engagement, and have worked at the University since 2014. My responsibilities include the Public Sector Equality Duty, where I have responsibility for co-ordinating and drafting the annual Equality, Diversity & Inclusion report, sharing the progress made towards the University's Equality Objectives and advancing equality more broadly. I also manage the University's Staff Experience Survey.



Joanna Kemp

Equality, Diversity and Inclusion Programme Manager

I joined the EDU in August 2023 as the EDI Programme Manager, where it is my role to develop and oversee delivery of the EDI Strategic Plan for the collegiate University (2024–2027). This work recognises that having an inclusive culture in which everyone can grow and flourish is essential to our continued success as a world-leading institution. Therefore, it is vital that at Oxford University, everyone 'does inclusion'.



Learning Objectives

Identify

key benefits from completing equality analysis.

Describe

the University's legal obligation under the PSED and the key benefits of conducting equality analysis (legal, decision-making, equality outcomes).

Explain

by whom, when and how equality analysis takes place.

Understand

and apply the process for conducting an equality impact assessment to a practical example.

Develop

your skills and confidence in being able to influence colleagues and senior teams to conduct EIAs for improved equality outcomes.

Reflect

on the session and identify steps you will take to implement what you have learned.

Find

resources and support available to assist with equality impact assessments.

Key Slides & Diagrams

What is the Public Sector Equality Duty?

- The PSED is a key provision of the Equality Act 2010 which places a legal obligation on public sector bodies to give **'due regard'** as to how they can:
 - Eliminate unlawful discrimination
 - Advance equality of opportunity
 - Foster good relations between people from different groups
- Protected characteristics (age, disability, gender reassignment, marriage/civil partnership, pregnancy/maternity, sex, sexual orientation, race, religion/belief)
- Other groups: part-time staff, socio-economic background, parents, carers



What is 'due regard'?

- The need to consider how we can **eliminate discrimination, advance equality of opportunity** and **foster good relations** in decision making and day-to-day activities
- A duty of empathy
- The level of 'due regard' depends upon circumstances and the impact on people
- 'Due regard' is fulfilled:
 - **before** and **at the time** a particular practice is under consideration; and
 - **at the time** a decision is taken



The EIA Process

1. The EIA Screening tool
2. If no, EIA not required, if yes, conduct an EIA

The EIA process:

- Q1 - Define the practice to assess
 Q2 - What is the aim of the new or revised practice?
 Q3 - What is the brief background to the practice?

Q4 - Who is likely to be affected by the practice?

Q5 - Could the practice affect people differently?

Q6 - Describe the positive or negative impact(s)

Q7 - How will negative impacts be mitigated against?

Q8 - Define your monitoring and review arrangements

Q9 - What are the next steps?



Equality Impact Assessments

- An **Equality Impact Assessment** is **not a legal requirement**
- They are an effective way of giving *'due regard'* as to how policies, practices, initiatives, events, activities, decisions, have the potential to impact people with different protected characteristics in different ways
- It is an assessment of the extent to which the practice has the potential to:
 - eliminate unlawful discrimination;
 - advance equality and opportunity; and/or
 - foster good relations between people from different groups



How will you implement what you have learned today?

Join us on Vevox.

vevox.app ID: 171-615-849

Keep updated after the workshops are over...

For recordings of the day:

<https://edu.admin.ox.ac.uk/edi-community-of-practice-training-conference>

Join the community of practice.

email EDICommunity@admin.ox.ac.uk

