**How welcoming and inclusive is the Learned Society of Wales?**

**Initial outcomes of Equality, Diversity and Inclusion research project: May – July 2021**

**INTRODUCTION**

The Learned Society of Wales has made a commitment to promote equality, diversity and inclusion (EDI) as part of its ongoing drive to develop as a national academy for the 21st century. This research, into how welcoming and inclusive the Society is considered to be, is a demonstration of this commitment and of the Society’s desire to listen and learn from current Fellows, from potential future Fellows and from external audiences. It has been commissioned by the Society’s Council and carried out by independent consultant, Catherine Hester.

The Society’s commitment to EDI is encapsulated in the following vision statement:

‘*The Learned Society of Wales has a strong commitment to equality and diversity. We seek to be a diverse Society and to reflect a diverse society. Our differences enrich us. We will not stand for sexism, racism or discrimination of any kind. We have a moral obligation to contribute to their elimination. We are committed to making the Society welcoming and inclusive. We will seek out participation from under-represented groups and will value and celebrate the contributions of all.’*

The challenge is not LSW’s alone: all institutions involved with higher education are reflecting on the implications of a commitment to equality, diversity and inclusion, and identifying what actions they need to take to move forward.

*‘The funding bodies, and the REF Equality and Diversity Advisory Panel (EDAP) which I chair, are fully committed to supporting and promoting equality and diversity in research careers. We firmly believe that all those involved in REF should exercise a shared responsibility for advancing equality and diversity.’*

Professor Dianne Berry OBE, Chair of the REF EDAP

 ‘*Diversity is essential to delivering excellence in science, technology, engineering and mathematics (STEM). A diverse and inclusive scientific workforce draws from the widest range of backgrounds, perspectives and experiences thereby maximising innovation and creativity in science for the benefit of humanity. The Society is committed to increasing diversity in STEM by seeking out participation from underrepresented groups, in order to build and develop a world in which studying and working in science are open to all.”*

The Royal Society

Over recent years, the Society has focused on the issue of gender balance, aiming to bring about incremental but purposeful change through concerted action by the Council, the Fellowship and the staff team. In December 2020, the Council held a special meeting on gender balance, considered possible actions in this area, and agreed to consult on a series of proposals. Subsequently, the Society decided to widen the focus of this work to include all aspects of equality, diversity and inclusion, with specific reference to the 9 protected characteristics in the Equality Act 2010. This research project is the outcome of this decision, designed with two interconnecting components:

* An online survey completed by 140 people, including existing Fellows, those who had been nominated for Fellowship but were not successful, and those who have never been nominated.
* Follow-up 1-2-1 interviews with 20 self-selecting participants, offering the participants the opportunity to share and discuss their experiences and perspectives in more detail.

**EQUALITY ACT 2010**

With respect to the specific survey questions relating to the Equality Act 2010 and the 9 protected characteristics, comments and suggested actions have been integrated into relevant thematic headings throughout the report. A general theme, expressed by several respondents, is the importance of promoting positive role models across all these characteristics. Respondents commented on the importance of ‘seeing people like me’ and ‘nothing about us without us’ as important indicators of how welcoming and inclusive the Society is seen to be.

In order to work effectively on characteristics other than sex, the staff team are clear that it is imperative that the Society gathers baseline data about the diversity of the Fellowship and uses this for ongoing monitoring of progress.

Data from the survey and the interviews has been combined and summarised, and key recommendations drawn out. The Society will need to determine which of the recommendations are ‘in or out of scope’ for its work, prioritising those actions deemed most likely to achieve its vision on EDI, and which use the resources, skills and expertise of the organisation to best effect.

The table below provides a summary of profile of respondents relating to gender and relationship with the Society.

|  |  |  |
| --- | --- | --- |
|  | **SURVEY** | **INTERVIEWS** |
| Male\* | 32 | 8 |
| Female\* | 45 | 12 |
| *\* of those who disclosed their gender* |
| Fellows | 86 | 11 |
| Nominated but not successful | 6 | 1 |
| Other | 48 | 8 |

I am deeply grateful to all of those who took the time to participate in this research.



Catherine Hester

July 2021

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8. **HEADLINE RECOMMENDATIONS**

**With specific regard to EDI, the Society should consider:**

1. **Strengthening focus on EDI:** establishing a Working Group and / or Diversity Champions to oversee, inform and guide a range of proposals agreed by the Council. This would include bringing in learning from within and without the Fellowship to ensure that best practice is followed in all key areas. Consideration should also be given to identifying specific staffing resource to augment capacity, e.g. through a Diversity Officer.
2. **Diversifying nominations with regards to gender and diversity:** establishing a specific Nominations Working Group to research and ‘talent spot’ top women, LGBTQ+ leaders etc across Wales and identify Fellows or staff to approach them directly, introducing the Society and Fellowship.
3. **Mentoring programme**: expanding and further developing this aspect of the Society’s work, with a particular focus on EDI. This would ensure that the Fellowship maximises its potential to support early and mid-career researchers and other professionals, nurturing a new generation of potential Fellows. One aspect of mentoring could be to support potential Fellows with completing the nomination process.
4. **Diversity / Women only events:** increasing the portfolio of events targeting specific groups (e.g. women, ethnic minority groups, those with a disability) within and beyond the Fellowship, and creating opportunities to network, share experiences and identify actions to overcome barriers.
5. **Scrutiny Committees:** continuing to develop guidance and training for Committees. Continue to keep the election benchmarks and criteria under review and increase guidance and training for Committees on how to apply the benchmarks and criteria with proper consideration of EDI. The Society may learn from other organisations with expertise in this matter, e.g. the Research Excellence Framework Equality and Diversity Advisory Panel. Consideration should be given to tasking a specific committee or individual with reviewing failed nominations, through an explicit lens of EDI.
6. **Public Profile:** expanding existing communications work to showcase Fellows from diverse backgrounds, on public speaking platforms, on the website, and as hosts or chairs at Society events. Consideration should also be given to further strengthening guidance for event organisers, with regard to gender and diversity, e.g. profile of speakers, gender balance for chairs, consideration of who speaks first.
7. **Welsh language:** reviewing the proposals arising from this research in relation to the Welsh language and continuing to develop the Society as an organisation in which the language thrives.

1. **UPDATES ON PROGRESS MADE BY THE SOCIETY ON EDI**

Throughout the research project, a number of issues were raised, questions posed or actions suggested, that have already been taken forward by the Society’s Council and staff. One assumption to be drawn from this, is that more needs to be done to ensure that the Society communicates effectively – within and beyond the Fellowship – about actions taken and progress made with regard to EDI. This has been noted by staff as an action to take forward.

In this section, the staff of the Society were asked to reflect on the key themes arising from the research and to provide headlines of actions taken over recent years and, where possible, the impact observed. This ensures that the recommendations in the report are cited within this context of ‘work in progress’.

**Fellowship nomination and election process**:

* **Recognising the full diversity of outstanding careers and contributions to learning:** the Society has made several recent updates to its benchmarks and criteria for election as a Fellow. The benchmarks now recognise a wide range of academic career trajectories, including those whose impact has been primarily in teaching, knowledge exchange and wider impact. Nominees need to meet a selection of those benchmarks, rather than all of them. Beyond academia, the C1 category provides a route for nominees who have made an outstanding contribution to public service, industry, creative arts and other areas of learning.
* **Taking account of circumstances that affect nominees’ careers:** since 2019, nominees have been invited to outline such circumstances, either on their nomination form or on a separate, confidential form seen only by the scrutiny committee chair. This allows the assessment process to take account of any circumstance. Scrutiny committee chairs are trained on how to deal with such disclosures, and report to the Vice-Presidents on how they have taken the circumstances into account.
* **Process followed by scrutiny committees:** the Society openly publishes its procedures for scrutiny committees’ decision-making, as part of its overall guidance document for nominations.

Since 2019, all scrutiny committee chairs and vice-chairs have had an induction meeting and explicit guidance on equality, diversity and inclusion. A single staff member attends every scrutiny committee meeting and reports to the Vice-Presidents and Fellowship Committee. This has led to improved consistency in the assessment process. However, the Society welcomes further suggestions to strengthen its processes – potentially including a member on each scrutiny committee who comes from outside that discipline.

* **Potential barrier of Fellowship fees:** the Society introduced a fee relief policy in 2019 and is clear that fees should not be a barrier to membership. In 2021, this policy was extended to nominees so that they can apply for pre-relief prior to their nomination being submitted.

**Gender balance and other aspects of diversity within the Society:**

* **Gender diversity:** the Society has taken steps to increase nominations of women to the Fellowship, and this is already showing signs of success (2021 saw the highest ever proportion of women nominees). The Society has since adopted a target that women should comprise 50% of nominees and Fellows are working proactively to secure nominations. The Council became gender balanced in summer 2021, and the Society continues to improve the gender balance on its other governance committees.
* **Diversity profile in Society activities:** the Society actively seeks diverse, including gender-balanced, panels for the Society’s events; organisations whose events the Society supports financially are asked to make similar commitments. Improvements have also been made to the gender and ethnic diversity of those pictured on our website.
* **Lack of Fellows from industry and public sector:** the Society is aware of the relatively low number of Fellows from these sectors, and in 2021 rewrote the nomination guidance document to encourage a wider range of C1 nominations. Staff have started to produce ‘talking heads’ videos from existing Fellows and agree that it would be helpful to include C1 Fellows in this work. The Society is also open to new ideas to increase nominations and further demonstrate the diversity of the Fellows.
* **Potential to establish an EDI committee:** This has previously been considered and the Society will consider it again as part of a wider governance review. The Society is also committed to appointing an EDI adviser to Council.

**Society activities:**

* **Need for activities to be more ‘outward looking’:** whilst staff are always happy to consider new activities, they have organised many ‘outward looking’ events. These have included a series of *Wales and the World* conferences and international symposia on economics, sustainable development and multilingualism. The last of these was an online event with more than 300 participants and contributors from across the world. The Society’s policy work has also engaged with ‘outward looking’ aspects, including the wider higher education and research sector, Brexit, devolution and governance arrangements in the UK.
* **Need to reach more people or engage the wider public in Wales:** the Society deploys its resources as strategically as it can – for example, it has recently started to offer small grants to foster new collaborative research initiatives.

In this way, it can support activities with the potential for a wider reach, without staff having to deliver everything themselves (given the relatively limited capacity). The Society has also organised wider public events and activities, and each year provides financial and practical support to other engagement initiatives. For example, this summer it is supporting the Merthyr Science Festival. There is a strategic question about to what extent the Society should use its capacity on such broader engagement work, especially when individual universities already have a strong commitment to such work. *The forthcoming strategic plan will consider this.*

1. **PUBLIC PROFILE - IS THE SOCIETY FOR ME?**

The starting point for both the survey and for the interviews was to ask: ‘how welcoming and inclusive do you find the Society?’ As one might expect, there was a wide range of opinions expressed in response to this question. For some, perspectives were shaped by their attendance at – or participation in – an event organised by the Society; for others it was reading the website; for some their opinions were most powerfully shaped by individual interactions with existing Fellows. This last point reinforces the sense that the Fellowship itself is a powerful tool for increasing equality, diversity and inclusion, that responsibility sits with each individual to actively encourage, welcome and support all those they come across.

*Positive perceptions of the Society*

Several respondents, particularly recently elected Fellows or those who have been closely connected to the core work of the Society, commented on the significant progress that has been made in recent years, especially with regard to gender equality.

* ‘I feel really positive about the progress the Society has made to addressing gender and equality over the past years. There’s a really visible and tangible difference evident in meetings, information and images that portray a more diverse cohort of Fellows. There’s more to do but definitely progress made.’
* Several respondents cited the recent women-only networking event as a significant and welcome move forward. ‘I was sceptical initially, but it was really positive and good to have ‘safe space’ to talk about imposter syndrome, how women always concentrate on what they can’t do.’
* One Fellow observed: ‘I am the lead for inclusivity in my institution, so always look at gender balance, background and ethnicity. To me, the website looks very inclusive, gender, ethnicities. What is written is very clear about wanting to encourage more women – think they are doing a good job’.

*Negative perceptions of the Society*

Many respondents expressed concerns about the Society’s profile – particularly, but not exclusively, those not directly (yet) involved with the work of the Society, i.e. including those who consider themselves potential future Fellows.

* Comments made touched on a range of issues, including: ongoing bias towards academia over excellence in other sectors (like business or industry); ‘it’s still an old boys club’; ‘an elitist academic club with no influence’; ‘very incestuous between the universities’.
* Many people, both within and without the current Fellowship, expressed concerns over the word ‘learned’, summarised by one interviewee in this comment: ‘this is such an archaic title. That someone in the 21st Century decided to call it the Learned Society is either presumptuous or pretentious. It’s just not an adjective that is in current usage’.

Many respondents made specific suggestions on how to improve the extent to which the Society is seen as welcoming and inclusive. *These specific suggestions will be examined in more detail by the working group as they look at the main EDI recommendations.*

1. **ROLE OF FELLOWS**

Current Fellows commented that to be nominated and accepted into the Society is a great honour. Respondents described the Society variously as ‘an essential element of devolution’, ‘less about championing your own excellence and more about using your position to access a wider network, to champion others in your field’, ‘a society of people who want to have impact from their work not a legacy of academia group’. That sense of wanting to be proactive in making a difference was widespread amongst Fellows: ‘I want to be part of something that is actively making a difference’. The desire to understand more about ‘the impact that Fellows have and the positive sense of being part of that community’ was equally widespread amongst those less directly involved with the Society at present.

The role of individual Fellows, the role of the Fellowship as a collective body, and the role of the staff of the Society, are all relevant here and it is important to distinguish between each aspect.

1. **DIVERSIFYING THE POOL OF NOMINATIONS**

There was near universal support for the principle that diversifying the profile of the Fellowship is important for the future of the Society, to ensure that it is ‘fit for the challenges of the 21st century’ and that proactive action is needed to achieve this outcome.

During the interviews, a number of women stated directly that they felt they would never be eligible for Fellowship as their background was not sufficiently academic, reinforcing the need to communicate widely about the revised criteria.

There was also significant support for the principle of supporting early and mid-career researchers, but not conclusive agreement on the best way to achieve that ambition.

Many respondents shared their experiences of a difference in how men and women approach and respond to Fellowship nominations. Several reflected their experiences that women are more likely to take a more cautious or passive approach: ‘if I am good enough, someone will approach and nominate me’, ‘I am not sure I would have the time to commit to the work required’.

They noted that in contrast, their experience was that men were more likely to proactively solicit a nomination and think ‘I will have a punt at that’.

Several women respondents talked about ‘impostor syndrome’ and the need to support women to feel confident about their potential suitability: ‘there’s no way I would have put an application in if I had not been approached, so being proactive would help to address that gender difference directly.’

*Some more specific suggestions were provided and these will be examined in more detail by the working group as they look at the main EDI recommendations.*

1. **THE NOMINATION AND SCRUTINY PROCESS**

As the Society has made significant revisions to the nomination process over recent years, it is worth noting that some comments received may have been influenced by older procedures and criteria for Fellowship. There was frequent reference to the need to make ‘rejection less damaging’ and to ensure that both feedback and future support is effective, specific and encouraging.

**Strengths of the current process**

Those Fellows and potential Fellows who had most recently gone through the nomination process (i.e. in the past two years) were generally very positive about their experiences. Several of those who were not successful initially, commented on the positive feedback process, noting that the constructive and encouraging nature of this helped them to submit successful nominations in subsequent years. A number of respondents from STEMM disciplines commented that the process was comprehensive and measurable.

**Weaknesses of the current process**

A range of comments were made by individuals in response to this question:

* Individual concerns were raised over the transparency of the process, the make-up of committees and the time it takes to complete nominations
* Need to review benchmarks to ensure they are equivalent across disciplines and that they recognise excellence beyond academia and traditional research
1. **WELSH LANGUAGE**

The Society has an ongoing commitment to support, promote and reflect the Welsh language. The recommendations from this research will make a helpful contribution to an ongoing review of this area.