



Lancaster University
Management School

THE GUIDE TO INTEGRATING GENDER-AWARENESS AND INCLUSIVITY IN RESEARCH AND INNOVATION

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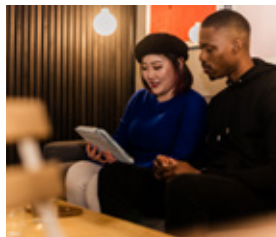


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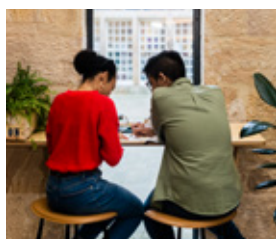


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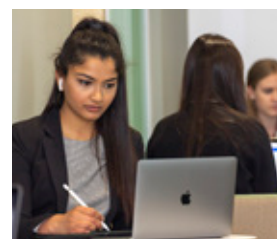
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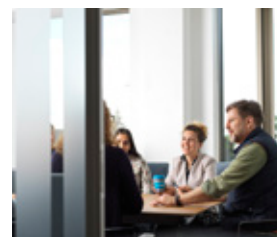
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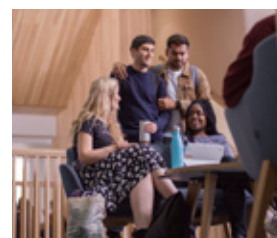
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1.0 Purpose of The Guide: Lancaster University's Commitment to Gender Equality and Inclusivity in Research

The Guide to Integrating Gender-Awareness and Inclusivity in Research and Innovation (The Guide) has been created by the Horizon 2020 **TARGETED-MPI**¹ project with the support of Lancaster University Management School's (LUMS) Equality, Diversity and Inclusion (EDI) Committee. The Guide builds on academic research, previous European gender quality projects and relevant Higher Education (HE) reports, which focus on the importance of practicing gender-awareness and inclusivity in all aspects of research². The Guide's primary purpose is to support researchers to incorporate gender-awareness and inclusivity in research and innovation, and therefore, it inevitably and inextricably intersects gender with other protected characteristics such as race, ethnicity, religion, disability, and sexuality. It does so by drawing on wider resources developed by Lancaster University (LU), such as the **Anti-Racist Learning and Teaching Toolkit**, **Disability Access Guide**, and the **EDI in Practice Guidance**. This guide also draws on LU's **Equality, Diversity and Inclusive Strategy**, and specifically, LUMS' **Gender Equality Report** and commitments as a **Level 2 Disability Confident** employer and its continued commitment to its **Race Equality Charter** and **Athena Swan** awards.

LU's institutional Strategic Plan for 2021-2026 has a primary goal 'to consolidate Lancaster University's status as a leading global research-intensive university.' This strategy maintains a significant focus on research and the research community and culture. LUMS is ranked first among business and management schools in the UK in terms of 'research power'³ and aims to follow **the principles of responsible research in business and management**. These principles aim to create research that is credible and has an impact. LUMS also aims to produce research in the key areas of sustainability, social justice, and innovation.

All major funding bodies require applicants to embed effective practice with respect to EDI as a central element of their application. Specifically, it is mandatory for all applications to Horizon Europe and UKRI programmes to include a **Gender Equality Statement**. This statement must outline how applications have taken 'meaningful yet proportionate consideration' as to how the project will contribute to reducing gender inequalities. LU's **Gender Equality Plan**, which aligns with the **Horizon Europe Gender Equality Plan** and **UKRI's Guidance for Equality, Diversity and Inclusion**, stipulates that all academic staff are expected to consider the integration of gender and inclusivity into their research activities.

Against this backdrop, the Guide aims to support research-active academics at all stages of their career, as well as department Research Directors, Research Support Officers and other research-enabling staff, and the Associate Dean for Research, in designing, conducting and supporting research that accounts for gender and inclusivity in a meaningful way so everyone can benefit equally from the research process and its outputs.

The Guide has been designed as a general guide for interdisciplinary research in business and management, and therefore, has not been created as a 'one size fits all' solution. It is understood that each research project and team will vary in their research aims, design, methodology, data collection and analysis techniques, and mode of dissemination – depending on their discipline and subject area. Thus, the guide provides a list of questions to be reflected on, where appropriate, to ensure that the research journey has engaged in the necessary due diligence required for inclusive research from its inception until its dissemination.

1 TARGETED-MPI - Transparent And Resilient Gender Equality Through Integrated Monitoring Planning and Implementation is a project funded by the H2020 scheme and focuses on institutional changes through the development and effective implementation of Gender Equality Plans in Business and Management schools to drive more inclusive, sustainable, and transparent academic cultures. At LUMS, the TARGETED-MPI project has worked on developing Gender Equality Plans by targeting key areas of interventions, including work-life balance and organisational culture, ensuring gender balance in leadership and decision-making and gender equality in recruitment and career progression. Developing The Guide is a key action in response to the LUMS Gender Equality Plan and is supported by the LUMS Executive Dean as well as LUMS' EDI action plans

2 See section 3.0 References and additional resources

3 UK Research Excellence Framework (REF) 2021: <https://www.lancaster.ac.uk/lums/news/lums-ranked-1-management-school-in-uk-for-research-power>

2.0 The Guide for Developing Gender-Aware and Inclusive Research

Organisations, work and the economy are not gender-neutral constructs, and therefore, they contribute to the institutionalisation of gendered cultures, hierarchies and perceptions of gender-appropriate jobs (Connell, 2019). Yet, there is still a significant prevalence of research in business and management that is 'gender-neutral', 'gender-blind' or 'gender-biased' (Truss et al., 2012). Taking these approaches inevitably leads to a lack of awareness and inclusivity of women, and subsequently, other protected characteristics in research. This has real-world implications as research findings are generalised to an entire population without adequately considering how diversity was considered in the project's research team, design, or methodology. As a result, the research can perpetuate social inequality through its dissemination.

The Guide supports the development of a gender-aware and inclusive approach to research by outlining reflective questions researchers and their teams can ask themselves during four key stages of the research:



1. Creating a gender-aware and inclusive research team



2. Designing a gender-aware and inclusive research project



3. Developing a gender-aware and inclusive research methodology



4. Preparing a gender-aware and inclusive dissemination plan

2.1 Creating a gender-aware and inclusive research team

Diverse research teams are crucial to prevent research from becoming biased toward certain gendered assumptions and to avoid gender-stereotyping and gaps in knowledge. Furthermore, diversity and inclusivity in research teams is also beneficial as such teams produce more novel and impactful research as compared to teams consisting of only one gender or social group. Gender diversity also leads to better reflections, more original results and higher citations (Maddi & Gingras, 2021). Furthermore, including individuals with a disability as members of the research team can provide valuable insight on improving accessibility and acceptability of research recruitment, design, and intervention approaches.

In terms of the creation of gender-diverse research teams, there are two main factors to consider: the composition of the team and the division of labour. Gender-diverse teams are fundamental to research integrity and for achieving social justice through research (Walsh et. al., 2019). Those leading a research project should seek to be mindful of various gendered entry barriers faced by potential researchers of the team. However, alongside ensuring gender-awareness and balance where possible, it is also important to pay attention to the power relations within the team and the gendered and hierarchal nature of labour within the team.

While creating a team for a (funded) research project, consider these reflective questions to support the creation of a gender-balanced and inclusive team:

1	Are there equal opportunities in the recruitment of the project team, including Co/Investigators and Research Assistants?
2	Is the language used in the job description and recruitment advertisements gender-aware and inclusive? This study by Gaucher et. al. (2011) may help in checking if a job description uses gendered wording which could deter women from applying for the job.
3	Is there an opportunity to achieve a gender balance in the project consortium and team, at all levels, including decision-making positions? If not, have you included a statement explaining why this was not achievable at this time for the project?
4	Have you observed a trend of hierarchical dynamics within the team if you have worked with the team members previously? If so, how can you avoid it in future projects?
5	How extensively are women, men, and where applicable, transgender and non-binary individuals, engaged in the planning, design, and evaluation of research across the project's partners?
6	Where applicable, does your project team include those from different race and religious, and minority ethnic backgrounds? And is it inclusive of those who are neurodivergent or have (visible/invisible) disabilities?
7	Do all team members perform equitable labour for your research project, in the context(s) or communities where your research will be undertaken, and findings will be applied?
8	Does the working environment of the research project promote equitable working conditions for everyone regardless of gender, sexuality, race, religion or (dis)ability (including pay, training opportunities, access to grants and funding), and accommodate personal commitments or varied career paths?
9	Have early discussions taken place to ensure that researchers in the team, at all levels, have an equal opportunity to engage in writing and publishing work from the project?

2.2 Designing a gender-aware and inclusive research project

A gender-aware and inclusive approach to research project design involves incorporating gender as a social construct that is integral to understanding business and management studies, rather than focusing solely on women as a variable. The gendered nature of organisational culture has implications for male and female workers, as well as for LGBTQ+ and minority ethnic communities, and those with disabilities.

While outlining the project's research design, consider these reflective questions:

10	Does the formulation of the research question integrate a gender or minority perspective?
11	Have you reviewed the varied literature and sources relating to sex and gender differences in the research field?
12	Does the proposal clearly and thoroughly outline how it will address gender-related concerns? àtheir exclusion?
13	Have you considered how gender and diversity are related to, or affected by, the subject of the research?
14	Have you considered how gender intersects with other socially constructed dimensions of difference that interact with the research topic, such as race, religion, disability, sexuality, nationality?
15	Have you reflected on your own biases, preferences, values, and socio-cultural background which could influence the process of the research and its findings?
16	Have you explored the resources on The Academy for Gender Equality and Social Justice Research in Organisations?

Fieldwork in research can often be a gendered experience based on the person carrying out the fieldwork and the participants in it. Porter and Schänzel's (2018) compilation of fieldwork experiences by women researchers showed important themes emerging based on access to research participants and spaces, considerations of attire, personal safety and well-being. Similarly, it is also important to consider the gendered nature of space and time as researchers design their data collection and employ diverse research instruments to ensure the perspectives of various research participants of different genders are captured.

While designing your fieldwork, consider everyone's safety and ethical conduct in the field through these reflective questions:

17	Have you chosen a location to conduct field work that is safe for women or those who identify as a member of the LGBTQ+ community to travel to? What about those from religious or minority ethnic groups?
18	Have you considered being flexible in the use of online fieldwork approaches to take account of gender differences in access to technologies and privacy requirements? For example, in some conservative communities, women, minority groups or those with disabilities may find it more comfortable and feasible to communicate online than face-to-face.
19	Have you considered using local community, civil society groups or relevant institutions to access hard to reach groups, especially women and ethnic minorities – for example, religious organisations, men's or women's wellbeing groups or co-operatives?

2.3 Developing a gender-aware and inclusive research methodology

Research that does not apply a gender-aware and inclusive approach may draw general conclusions based on partial data. To comprehend specific societal processes, it is imperative to incorporate perspectives from both males and females (Mihajlović, Trbovc & Hofman, 2015) and where relevant transgender and non-binary people. Using a wide range of qualitative as well as quantitative research tools is crucial to investigate gender relations inherent in business and management. Business and management research, that endeavours to respond to real world problems, needs to employ methodological tools that can uncover the gendered dimensions of a research question.

Consider these reflective questions to support you in the development of your project's methodology:

20	Does the methodology ensure that (potential) sex/gender differences are investigated? (e.g., will sex/gender differentiated data be collected, analysed, and included as part of the final publication?)
21	If you are using an established methodological approach in your field, have you thought about how you could integrate gender into it, or have you researched the latest methodologies that can be used to effectively uncover gendered dimensions of the research question?
22	Have you considered developing evaluation and impact indicators that take into account gender and diversity in your sample?
23	Have you considered other intersecting factors with sex and gender (e.g., age, ethnicity, disability, religion, sexuality, disability, race or caste) in your methodology?
24	Do analyses present statistics, tables, figures, and descriptions that focus on the relevant gender differences identified during the project?
25	Are you using gender-aware and inclusive language? (e.g., avoid overusing masculine pronouns when discussing your sample and analyses)



2.4 Preparing a gender-aware and inclusive dissemination plan

To foster gender awareness and inclusivity in dissemination activities, researchers must be mindful of how they share the impact of their work, i.e. their communication styles and practices. Adopting inclusive language, imagery, and dissemination is crucial for realising the project's ambitions.

Consider these reflective questions before disseminating the findings of the research:

26	How will you encourage equal access to your project's knowledge outputs? For example, have you included stakeholders that focus on gender among the target groups for dissemination, along with mainstream research conferences or journals?
27	Have you considered how people of different genders, ethnicities and abilities could use the project results in different ways?
28	If the results of your project contain policy recommendations, how does this speak to men and women, and where applicable, transgender and non-binary individuals, of different ethnicities, religions, and sexualities in society?
29	Do you report and promote gender disaggregated data?
30	Have you checked if your publication/exhibition presents images that are inclusive of different minority groups? And have you considered if these images may reproduce stereotypical gender roles?
31	Are graphs, charts, or images used to visualise abstract concepts that are gendered and not inclusive of minority groups in unintended ways?



3.0 References and Additional Resources

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Notes

Personal reflections on using the guide

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