



CoARA

Coalition for Advancing
Research Assessment



TIER – Towards an
Inclusive Evaluation of
Research

Self-Assessment Report

Inclusive Excellence in Research Evaluation

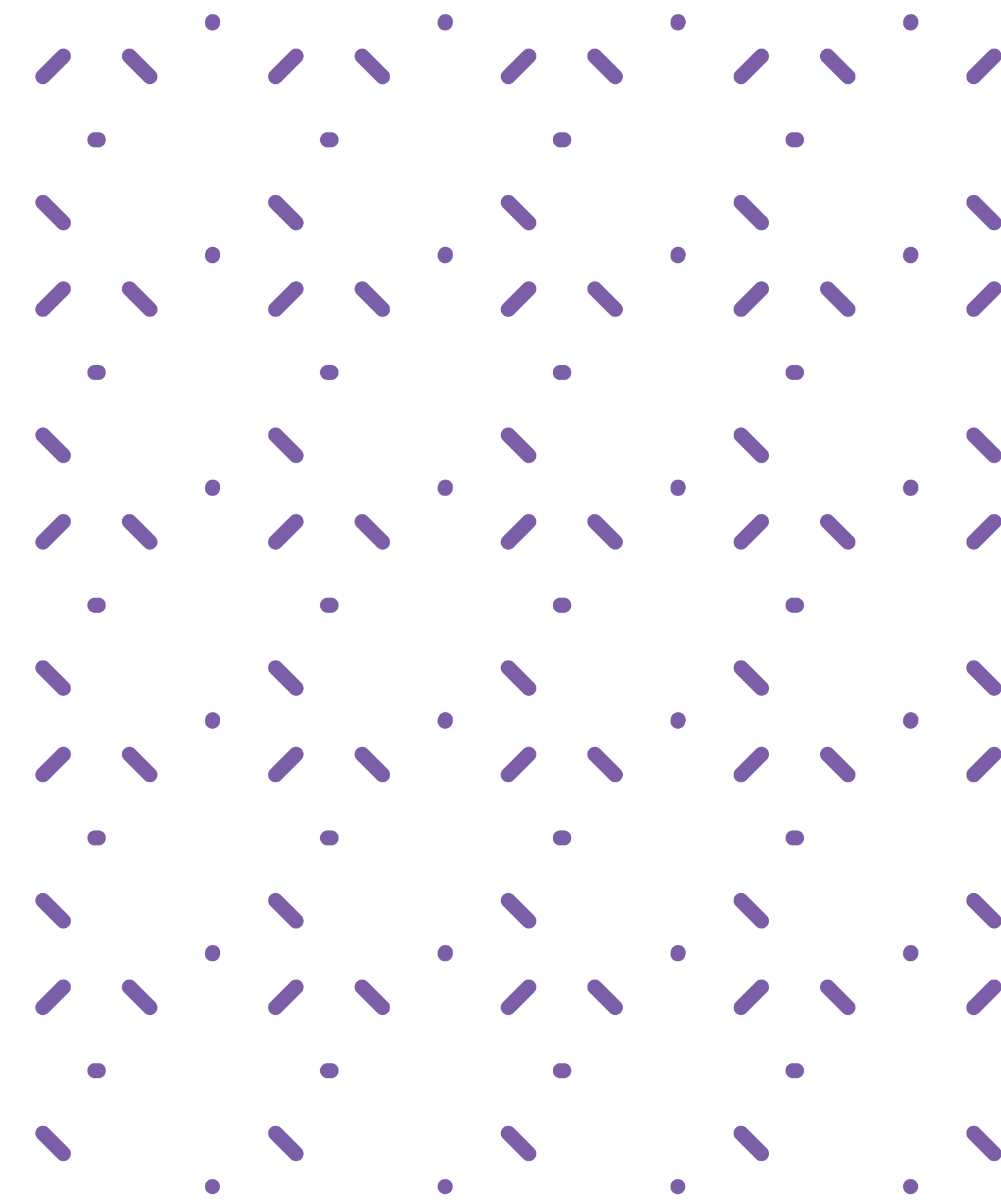
A toolkit for **Research Performing Organizations (RPOs)** and **Research Funding Organizations (RFOs)** aiming to build fair, inclusive and transparent researcher evaluation processes.

**GENDER
EQUITY**

**INCLUSIVE
EXCELLENCE**

**BIAS
AWARENESS**

**EDI
POLICIES**

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Introduction

Does your institution want to identify excellent researchers?

If so, it is crucial to recognize that researchers are diverse in their backgrounds, career paths, and contributions to science.

This interactive toolkit supports you and your institution in rethinking evaluation strategies to make assessments fairer and more inclusive, with the goal of recognizing all excellent researchers. Ultimately, this can enhance both the quality of scientific knowledge and its impact within and beyond academia.

Inclusive understanding of scientific excellence

We build on [CoARA's](#) vision, which aims *"to recognise the diverse outputs, practices, and activities that maximise the quality and impact of research through an emphasis on qualitative judgement in assessment, for which peer review is essential, supported by the responsible use of quantitative indicators."*

We invite all institutions active in the evaluation of researchers and of their work to carefully reflect on how the institution defines scientific excellence and consider how it can move towards an inclusive understanding of excellence. This self-assessment toolkit supports you and your institution in 1) gaining a better understanding of where your institution stands in terms of an inclusive evaluation of researchers and 2) identifying which measures, processes and networks can enable your institution to develop inclusive excellence.

This toolkit is for all those institutions aiming to identify excellent researchers: this implies developing approaches which acknowledge the diversity of researchers, they have distinct backgrounds, career paths, and/or contributions to scientific knowledge. This toolkit supports you and your institution in rethinking evaluation strategies to make evaluations fairer and more equal. Ultimately, this toolkit supports your institution's ability to lead high-quality research and contribution to scientific innovation.

How some institutions redefine excellence to promote responsible assessment of researchers – some practical examples:

- A description of why diversity/inclusive excellence matters from the Dutch Funding Agency (NWO): <https://www.nwo.nl/en/position-paper-room-for-everyones-talent>
- A national recommendation for the responsible evaluation of researchers in Finland: [National Recommendation for the responsible evaluation of a researcher / Responsible Research](#)
- A video of the Royal Society explaining why it is important to have diverse groups for evaluations and how they can overcome biases: <https://www.youtube.com/watch?v=uzZppdjFFVg>
- A presentation by the Swiss National Science Foundation of its model of scientific excellence, building on multiple dimensions and highlight diversity in scientific excellence: [The SNSF's model of excellence](#)

TIER's perspective

- Quantitative metrics still remain the most widely used, largely because they are easiest to use and because they are considered to be objective.

- Using quantitative metrics, however, can often lead to a variety of biases: for instance, women have fewer citations than men as a result of a persistent gender bias in academia (see Elsevier's tool for measuring [Progress Toward Gender Equality In Research And Innovation | Tableau Public](#)). As women are less cited, they are considered less excellent and thus are less rewarded and/or funded. This, in turn, reduces women's chances of having a long-term career in academia.
- Focusing on quantitative metrics when evaluating researchers can reduce evaluators' capacity to acknowledge innovative scientific research, because quantitative metrics are only a partial reflection of people's capacities - and sometimes, because of the "publish or perish" culture, a distorted one.

Resources produced by the CoARA TIER working group

To find out more about the outputs of the CoARA TIER working group on inclusive excellence, you can:

- Browse the collection of References for Communication and Training on gender biases provided on Zenodo <https://zenodo.org/records/19855074> CoARA WG TIER (2025). Inclusive Excellence: how and why? Report of the TIER online workshop on June 27, 2025. <https://zenodo.org/records/18750386>
- CoARA WG TIER – Report of the In-Person Meeting of 7 February 2025, Milan, Italy <https://zenodo.org/records/18750251>
- Implicit Biases in Research Evaluation – TIER – CoARA, June 27th, 2025, Coniglione M. <https://zenodo.org/records/18746584>

Institutional self-assessment

To help you assess where your institution currently stands and **identify best practices** that can be adopted and implemented, the CoARA-TIER working group has produced a detailed checklist of measures. These allow institutions to:

- 1) identify where they currently stand in terms of inclusive evaluation of researchers,
- 2) understand how they can further advance and progress on this important topic, thus fostering an inclusive research culture.

FAQ

Who is the toolkit for?

This toolkit can be used by anyone working in a Research Performing Organization (RPO) or in a Research Funding Organization (RFO) and aiming to contribute to **making evaluation processes and practices fairer and more inclusive**.

This self-assessment toolkit can be used in RPOs and RFOs at different levels. It can be useful for the Rectorate, Faculties, Human Resources offices, EDI offices, officers in charge of preparing evaluation panels, evaluation committees and anyone interested in promoting a responsible research assessment within their institution. The toolkit provides concrete measures with clear explanations of how they work.

How should the toolkit be used?

This toolkit provides a structured approach to identify measures aimed at supporting your institution to move towards fair and inclusive evaluation of researchers. Through a step-by-step structure, the toolkit leads you towards the identification of targeted measures:

- ◆ Firstly, to define whether you are interested in measures for RPOs or RFOs.
- ◆ Secondly, to define the type of measures you are looking for (e.g., policies, data collection, evaluation practices).
- ◆ Thirdly, questions assessing whether your institution already adopted specific measures (e.g., narrative CVs, bias training, lottery).
- ◆ As you consult the different measures, you might realize that some of them cannot be adopted and implemented in your specific context. However, you might identify another best practice aimed at solving the same challenge. In relation to this, have other Universities or faculties / funders adopted measures to address this challenge?
- ◆ You might also face resistance on some of the topics and proposed measures. In that case, you could consider how to get more stakeholders on board. For example, who can you talk to in order to raise their awareness? How could you convince different groups to support these changes?
- ◆ At the end of the process, you can download a document which lists measures that are relevant for you and your institution.

By taking the time to go through the toolkit, you will be better prepared to contribute in creating inclusive research culture in science.

- **Does the TIER Toolkit collect or store any personal data from questionnaire responses?**

No. The TIER Toolkit is designed as a self-assessment instrument for use within your own organisation. No data entered in any questionnaire or assessment form is collected, stored, transmitted, or processed by CoARA or any third party.

- ◆ No data collection. Responses to questionnaires remain entirely on your device and are never sent to any server.
- ◆ No tracking or analytics. The Toolkit does not use cookies, tracking pixels, or analytics tools that could identify individual users or organisations.
- ◆ No third-party sharing. Since no data is collected, no data is shared with or transferred to any third party, under any circumstances.

Full confidentiality. Your self-assessment outputs are for your organisation's internal use only. CoARA has no access to them at any stage.

For any questions regarding data protection and the TIER Toolkit, please contact the TIER Working Group at silvia.penati@mib.infn.it. Data controller for any other CoARA-related processing activities: CoARA – Coalition for Advancing Research Assessment.



PART 1

Research Performing Organizations (RPOs)

POLICIES

Gender Equality Plan (GEP)

Questions to help determine whether your institution has adopted specific measures:

- Does your institution have a **GEP**? If so, is it updated and published?

A **GEP** is a set of commitments and actions that aim to promote gender equality in an organisation through institutional and cultural change.

It includes four requirements:

- ◆ It must be a public document signed by the top management that shows commitment to gender equality
- ◆ Dedicated resources and expertise on the topic
- ◆ Data collection and monitoring, including disaggregated data on sex and gender
- ◆ Training and action on gender equality

See: [What is a Gender Equality Plan | European Institute for Gender Equality](#)

- Does the GEP clearly state the organization's objectives and strategies for achieving them?

Many national university sectors encourage universities to publish GEPs, because they can set out multiple ways for combatting inequalities in the university.

A GEP is strengthened when it includes a gender-responsive budgeting component: analysing how institutional resources are actually distributed across genders moves beyond stated commitments toward measurable accountability.

- Is the GEP used, in practice, to make data-driven and informed decisions and, where necessary, mitigate disparities?

See: [DORA \(2025\), Practical Guide to Implementing RRA at RPOs.](#)

Monitoring the **presence** of EDI measures is not sufficient – institutions should also assess their impact. Evidence-based review cycles, combining quantitative outcome data with qualitative feedback from researchers, allow institutions to identify what works, what does not, and where further intervention is needed.

- Is this budget analysis made public and used to inform institutional decisions?

See: [CRUI \(2019\), Linee guida per il Bilancio di Genere negli Atenei italiani; Oppi et al. \(2021\).](#)

A **GEP** usually includes five recommended areas of intervention:

- ◆ Work-life balance and organisational culture
- ◆ Gender balance in leadership and decision-making
- ◆ Gender equality in recruitment and career progression
- ◆ Integration of the gender dimension into research and teaching content
- ◆ Measures against gender-based violence, including sexual harassment

GEPs are currently set as a requirement to apply for EU-funding, hence it is likely that most RPOs have one (or a similar document).

- Does your institution evaluate whether its EDI policies produce measurable change, collecting data before and after implementation and reviewing them periodically?

See: [What is a Gender Equality Plan | European Institute for Gender Equality](#)

Interaction between the EDI/human resources offices, governance bodies, and departments/faculties on gender issues can importantly allow the university to understand issues and search for solutions.

Gender Equality is increasingly part of international agendas, such that European grants require researchers to submit a GEP, making researchers aware of how they act in collaborative research.

Internal & External assessment of Gender Equality Plan

- Is your GEP or equivalent document subject to an internal assessment to measure compliance and progress?

See, for instance, the approach used in the UK: [Athena Swan Charter / Advance HE](#)

The commitments made in the GEP or other equivalent document/s are reviewed by an internal or external organ to examine to what extent the objectives are achieved and how much progress is made.

This ensures that stated measures are effectively implemented and that the institution is making progress on targeted objectives.

- Is your GEP or equivalent document subject to an external assessment to measure compliance and progress?

In the case of Athena Swan Charter, the achievements are recognized by an award. Reaching a certain level is required to apply for funding.

Maternity and paternity leave policy/policies

- Do maternity/paternity/parental leave policies differ for fixed-term and permanent researchers/staff?

In some countries, national-level policies for fixed-term workers are less generous and more restrictive than for permanent workers.

If maternity/paternity/parental leave policies differ for fixed-term and permanent researchers/staff, it is useful to consider how your organisation can assist fixed-term researchers and guarantee their maternity/paternity/parental leave rights. As such, the organisation might decide to integrate gaps by providing additional services or provisions.

- What maternity and paternity leave policy or policies are in place, beyond national policies?

See: [Cambridge University: Summary of leave for personal or family reasons / Human Resources](#).

In some cases, universities have very positive conditions for maternity leave. The University of Cambridge, for example, has a very positive policy. According to UK law, only the first 6 weeks are guaranteed at 90% of pay, and the rest of the weeks (33 weeks) are paid at the lower statutory rate.

Cambridge, instead, pays the full salary for 26 weeks, giving full pay for longer.

- Does your maternity/paternity/parental leave policies simply follow national policy? Understanding where your institution stands.

Definition of working conditions for researchers (*working horse, salary, further education, etc.*)

- Does your institution have guidelines defining the working conditions for researchers, and does it officially endorse the EU Charter for researchers?

Working conditions are a crucial factor influencing researchers' lives but also the attractiveness of RPOs. They include salary, work-life balance, and social rights, all of these aspects are part of the researchers' contracts. The EU charter points out key aspects which make working conditions optimal.

See: [The European Charter for Researchers](#).

The main objective is to contribute to the development of attractive, open and sustainable employment opportunities for researchers and avoid reproducing precarious working conditions, such as fixed-term contracts.

- Does your institution follow the R1–R5 profiles which identify different career stages?

See: [R1–R5 profiles](#).

These career profiles are meant to give a general perspective on academic careers.

- Has your organization obtained the ‘HR Excellence in Research Award’ from the European Commission for its commitment to implementing the principles of the Charter?

See: [HR Excellence in research award](#).

This award encourages institutions to engage with relevant questions and certifies that they respect important aspects of researchers’ careers.

- Does your institution provide dedicated support for international researchers (visa and permit processes, access to social security, etc.)?

See: in the UK, there is the [Concordat to Support the Career Development of Researchers](#).

Committing to measures that create inclusive work environments allows to create an attractive and socially-sensitive work environment for aspiring candidates. This includes aspects such as mental health, solid contracts which are comprehensive of social benefits, and dedicated monitoring which can allow the organization to keep track of the well-being of its workers.

- Does your institution have policies and practical measures ensuring physical and organisational accessibility for researchers with disabilities and or neurodivergencies?

See: [LERU on EDI policies](#).

Inclusive work environment – EDI policies and EDI data

- Are EDI policies published, such as on the organization’s website on a dedicated page?

An inclusive work environment, according to EDI principles, ensures all staff feel respected, valued, and able to contribute regardless of gender, background, or identity.

See: for instance, the [UniSAFE tool: Where to start – UniSAFE Toolkit](#).

Misconduct reporting system

- Does your institution have a regulation for assisting people with disabilities?

See: [EU survey on EDI in universities](#).

- Does your institution have a code of conduct to address gender-based violence and other forms of violence?

See: [Gendersafe: Good examples and testimonials, available here](#).

- Does your institution have an anonymous reporting system for reporting misconduct?

See: [Report + Support – University of Leeds](#).

Some researchers might fear retaliation when reporting verbal or physical racist/offending/sexual harassment, language, discrimination, violence. Offering the opportunity to report anonymously might open the possibility to identify problematic behavior within the organisation, enhance workers’ willingness to speak up, and take appropriate measures towards the offender.

DATA AND MONITORING

Disaggregated Data Collection

- Does your institution systematically collect sociodemographic data to monitor equity in hiring, funding, career progression and research outputs, administrative duties, teaching and student mentoring?

See: [She Figures 2024 \(European Commission\)](#)

Disaggregated data allows your organization monitor and analyse the respect of EDI dimensions. Aggregated analyses such as those of [‘MINDtheGEPs’](#) and the EU ‘She figures’ rely on data availability.

Ideally, the EDI office should **construct a database** of disaggregated sociodemographic data dedicated exclusively to information on the amount of the organisation’s population belonging to groups that tend to be more discriminated against than others.

Cross-sectional data – showing the proportion of women and men at a given point in time – is insufficient to identify where and why gender gaps emerge.

- Does your institution collect EDI data longitudinally, tracking the same cohorts of researchers over time rather than only taking cross-sectional snapshots?

See: [NIFU-NY Eval project \(Norway\): A longitudinal tracking of CoARA/NOR-CAM implementation.](#)

Longitudinal data, tracking cohorts over time, allows institutions to pinpoint the specific career stages at which women disproportionately leave academia or stall in progression. Evidence consistently identifies the post-PhD transition as a critical bifurcation point, but this is only visible through time-series analysis.

- Which dimensions of diversity are covered (sex, gender, age, nationality, ethnic background, migratory background, disabilities, etc.)?

See: [CoARA, ACA-WG \(2025\), Mapping ACA reform initiatives: Survey outcomes.](#)

Similarly, and in order to ensure an accurate monitoring of the organisation’s attempts to reduce biases, it is recommended that organisations collect data on the reviewers which appoint new staff, whether administrative, researcher or teaching.

Data Analysis

- Does your institution analyse institutional statistics on the profiles of its researchers?

Descriptive statistics summarize hiring, funding, career progression, and research outputs by gender, ethnicity, nationality, and field. They help organizations track trends, assess resource distribution, and identify potential biases in recruitment or funding decisions. Publishing applicant and success rates by diversity indicators supports transparency, self-assessment, and progress toward EDI goals.

Data Availability

- Does your institution make the data on EDI statistics/indicators available (public)?

Useful platforms for publishing data include: [zenodo](#), [github](#), [research data repositories](#), the organisation’s website, online dashboards.

For many universities, especially if public, making data on their progress and processes is crucial to ensuring their public purpose remains intact. By consulting and reviewing a university’s reports, people are aware of its characteristics, and, for those working within the university, new decisions and objectives can be built based on conclusions made in the reports. Indeed, international entities such as institutions or associations need available data in order to report on EDI instances.

- Does your institution publish the organisation's EDI data, when available in a FAIR & GDPR compliant way – and make it available in an open data repository/ in an open dashboard/upon request?

Making sure that some indicators for monitoring EDI (such as the percentage of female researchers as a proportion of male researchers, the number of GEP objectives achieved as a total of the GEP's overall objectives, etc.) exist and are used in monitoring equity ensures that the organisation can evaluate its progress as it works towards EDI goals.

See: [General Data Protection Regulation \(GDPR\) – Legal Text.](#)

The University of Naples Federico II has a dashboard on [Gender-disaggregated tables and gender indicators for students, teaching and research staff, technical-administrative and managerial staff, and governing bodies](#). The data is monitored and updated at least quarterly.

Similarly, the University of Milan provides [a dashboard with information on its research publications, and on publication costs](#). Although these are not EDI aspects, the dashboard is a useful example of a simple way to communicate institutional data.

If EDI data is missing, hard to find, or not updated, on the other hand, it becomes a real challenge to understand if and how the university tackles EDI issues and biases. Local-level data from universities is crucial for making national statistics, which are then used for international reporting as well.

Monitoring the organisation's data

- Does your institution use data, analysis and indicators to evaluate the effectiveness and the impact of your policy on equality, diversity and inclusion?
- Are indicators which specifically measure diversity and inclusion dimensions (representation diversity, access to recruitment, success rates/budget allocation) used to guide decision-making in hiring, funding, promotion, career progression, research outputs evaluation, administrative duties, teaching and student mentoring?
- If not, have you considered coordinating offices dedicated to data collection and analysis with EDI office/human resources office, and internal research evaluation to discuss how to build and use indicators to improve equity in hiring/career progression/funding/research evaluations, etc.?

Making sure that some indicators for monitoring EDI (such as the percentage of female researchers as a proportion of male researchers, the number of GEP objectives achieved as a total of the GEP's overall objectives, etc.) exist and are used in monitoring equity ensures that the organisation can evaluate its progress as it works towards EDI goals.

TRAININGS ON THE DETECTION AND AVOIDANCE OF BIAS IN RESEARCH EVALUATION PROCEDURES

Bias Awareness Resources and Trainings

- Does your institution provide trainings on biases for the following target groups:
 - ✓ For committees who evaluate researchers for recruitment and/or career progression?
 - ✓ For newly-hired administrative staff?
 - ✓ For newly-hired research staff?
 - ✓ For newly-hired teaching staff?
 - ✓ For academic and non-academic leadership positions?

Training on biases teaches people to detect and counter those unconscious preferences or stereotypes which we apply to our thoughts and opinions and which can affect recruitment/promotion decisions in the context of assessment. Resources and training on biases are very useful for improving the degree of awareness and thus reducing biases in the long-term – as bias detection becomes widespread, society more broadly will engage differently in social relations.

They are important because they help ensure fairer, more objective evaluation and decision-making.

See [this project's finding on biases and trainings in academia](#); **see** [the Royal Society's work on unconscious bias \(2015\)](#); **see** [the video catalogue by CoARA ExPECT \(2025\)](#).

If your organization does not provide resources and/or training/s on biases, it should consider setting them up, seeking resources and help, starting from TIER Working Group and other relevant Groups. If training is absent or difficult to organize, institutions can start in a simple way, by simply organizing occasions during which participants read/consult/view/listen to the available resources and then biases are collectively discussed.

Providing bias-awareness training, especially if it becomes compulsory, can help an organization to affirm EDI values and ensure their concrete enactment in procedures of evaluation, recruitment and career progression.

- If yes, how frequently are they held, are they compulsory or voluntary, is attendance monitored?

It is important that training of this type be discussed by your institution and redacted by groups of academics and/or experts who are aware of the psychological functioning of biases and also of the biases existing in recruitment and promotion processes in academia.

See: [“Background noise”, redacted by the National Research Council of Italy \(2023\)](#).

- Does your institution provide resources (videos courses/reading material/IAT (Implicit Association test)/other) for raising awareness on biases in evaluation procedures?

See: [a list of resources collected by the TIER group, available \[here\]\(#\)](#).

- Does your institution assess whether bias awareness training produces measurable change in evaluation practices, for example through pre/post surveys or monitoring of evaluation outcomes over time?

See: [the course on Responsible Research Assessment by DORA \(2024\)](#); [Recruitment Bias in Research Institutes, redacted by CERCA \(2016\)](#).

It is highly recommendable that particular attention be paid to training committees – who are often NOT trained against biases. Ideally, training should be redacted using available resources and configured with the collaboration of the RPOs' governing bodies, to ensure that the entire organization uses training regularly to improve the fairness and equity of its recruitment process.

EVALUATION CRITERIA

Quantitative & Qualitative indicators/metrics to evaluate researchers

- Is there one or more policy defining which indicators or metrics (e.g. number of papers, h-index..) should be used in the organization for evaluating candidates for:
 - ✓ New recruitments?
 - ✓ Career progressions?
 - ✓ Grants distribution?

Structured frameworks such as NOR-CAM (Norwegian Career Assessment Matrix) offer a concrete model for multidimensional academic evaluation. NOR-CAM assesses researchers across six dimensions:

- ◆ **Research outputs** – publications, datasets, software, patents
- ◆ **Research process** – methodology, open science, reproducibility, peer review
- ◆ **Pedagogical competence** – teaching, supervision of students and early career researchers
- ◆ **Impact and innovation** – societal impact, technology transfer, policy influence
- ◆ **Leadership** – project and group management, institutional coordination
- ◆ **Other experience** – competences acquired outside academia, career breaks, non-linear trajectories

Each dimension is documented both quantitatively and qualitatively, with space for narrative reflection. The framework is flexible – institutions adapt the weighting to their profile and disciplinary context. Finland and Sweden are developing equivalent national versions (FIN-CAM, SWE-CAM).

See [the NOR-CAM framework](#):
[the work of the CoARA WG ACA \(2025\)](#), *Rethinking ACA: Lessons and tools for reform*.

Traditional bibliometrics are used for evaluating researchers and their research output, but they are a biased measure of the research quality. H-index, number of citations, number of publications, impact factor of the journal do not fully account for quality, context and other duties (such as teaching, student mentorship), thus they need to be complementary and not determinant, indicators.

- **Do departments/faculties have the chance, according to your organisation's regulations/policies, to produce their own indicators?**
- **Does your institution avoid reducing evaluation to a single composite score, assessing each dimension contextually instead?**

Composite scores that aggregate bibliometric indicators have been shown to introduce additional bias, including correlation with academic age.

Recently, there has been a development of normalized metrics for accounting for the context, for example the Field-Weighted Citation Impact (FWCI), which calculates, for each research output, the number of citations accounting for that specific field of research and for the year of publication.

- **Does your institution explicitly recognise open science practices (data sharing, open access, peer review, preregistration) as assessable contributions?**
- **What are the similarities and differences between the national-level and university-level policies or guidelines on research evaluation?**
- **Does your institution use specific context-metrics to account for diversity of contributions (such as metrics normalized by field of research, research seniority, age, parental leave, career gap, etc)?**

Transparency of the criteria for recruiting and career progressions

- Are evaluation criteria made public in advance by the committees **before** the evaluation date?

See: [an insight into how job adverts influence application trends.](#)

If criteria that will be used for evaluation are not made publicly available previously to the examination/colloquium, candidates may feel that the evaluation procedure is not transparent and is too vulnerable to arbitrary behaviour. Indication on evaluation criteria or aspects of candidates' work/curriculum that will be considered for the position is, instead, an adequate way to communicate the organisation's expectations when hiring new researchers/staff.

- Are recruitment calls checked for language and phrasing to avoid gendered language and in accessible formats (e.g., readable with screen readers, using dyslexia-friendly fonts)?
- Are benchmark/minimum requirements/eligibility criteria for career progressions made publicly available?
- Is there a dedicated procedure for requesting specific accessibility supports for oral or written examinations?
- Does your institution have specific procedures in place to prevent the disclosure or inadvertent publication of deadnames of transgender applicants who have not yet completed legal gender recognition?

It would be ideal for your institution to consider this in its procedures.

Inclusive knowledge production

- Does your institution map to what extent researchers engage with gender in teaching, and in research knowledge production?

Some universities may want to consider the degree of inclusion of critical knowledge (research and teaching) that is present. A university where knowledge production is more inclusive can encourage a more bias-sensitive environment and thus more respect of EDI principles.

Societal impact and stakeholder uptake

- Does your institution consider societal impact, stakeholder uptake, and the final results of a project into account whenever relevant when evaluating researchers?

See: [CoARA's recent view on societal impact in publications' assessment.](#)

Quality and quantity evaluation of teaching, student mentorship, administrative duties

- When researchers are evaluated for hiring/career progression/funding, etc, do you consider the quality of teaching and mentorship, and the quantity of administrative work which they also carry out?

See [The NOR-CAM matrix considers how these contributions should be considered. This guide for more.](#)

"Housekeeping academic work" refers to the "invisible" work comprising important but undervalued tasks that fall disproportionately on certain researchers (often women). These tasks are time-consuming and essential for both academics and institutions; accounting for them in research evaluation – alongside other metrics – is therefore good practice for making invisible work visible.

EVALUATION PROCESSES

Narrative CVs

- Does the organization ask candidates to provide a narrative CV instead of a 'traditional' CV?

The narrative CVs is one tool to move away from a narrow focus on publications and research funding, in line with CoARA's commitments. Narrative CVs allow candidates to discuss their professional development by referring also to aspects such as maternity/paternity/parental leave/non-linear research careers, experience and knowledge gained during other types of work experience, societal involvement and impact generated, and so on. Importantly, if committees consider these broader aspects when evaluating candidates, they can more concretely integrate the gender dimension (for example, by not discriminating women who have had career breaks for maternity purposes) as well as other dimensions (for example, by not discriminating against publications published in languages other than English).

See for instance:

[Why researchers should consider a narrative CV | THE Campus Learn, Share, Connect: European Research Council \(ERC\): the narrative CV: Frith \(2025\), Breaking Barriers – impact of narrative CVs on underrepresented researchers, funded by EDICA; Research Professional News \(2025\), Narrative CVs risk worsening the biases they aim to redress.](#)

In 2022, the European Research Council discussed the narrative CV, suggesting that it allows committees to also consider other kinds of outputs which are relevant for a research career but are not usually considered in CVs which mostly focus on research publications.

The Marie-Curie Alumni Association and the Young Academy of European have opened a platform (free of use) where researchers and CV mentors can read and share narrative CVs and think collectively about how to make them appealing and useful for both researchers and organizations.

- Are evaluators trained on how to assess narrative CVs consistently, avoiding advantages for researchers with stronger academic writing skills?

See [the Royal Society also has a variety of resources on Narrative CVs; MCAA/YAE peer exchange network and platform for narrative CVs. MCAA/YAE peer exchange network and platform for narrative CVs](#)

- Does your institution provide guidance or templates to help candidates – especially those from underrepresented groups – write effective narrative CVs?

See for instance this example from Finland: [Template for researcher's curriculum vitae / Finnish National Board on Research Integrity TENK.](#)

It would be ideal for your institution to consider this in its procedures.

- Does your institution combine narrative CVs with structured evaluation criteria to limit the influence of writing style on assessment outcomes?

See [DORA \(2021\), Using Narrative CVs: Process optimization and bias mitigation: an example from Utrecht's template Research Professional News \(2025\), Narrative CVs risk worsening the biases they aim to redress](#)

Narrative CVs are a promising tool, but evidence shows they carry risks if not carefully implemented. Researchers from underrepresented groups – including women, ethnic minorities, and early career researchers – report significant barriers to adopting the narrative format, including unfamiliarity with the expected language and anxiety about self-promotion. Furthermore, narrative CVs may inadvertently favour confident self-narrators, potentially compounding existing advantages rather than reducing them. To mitigate these risks, institutions should pair narrative CVs with structured criteria, provide writing support to candidates, and train evaluators explicitly on how to assess narrative content without being influenced by writing style.

Composition of evaluation committees

What rules exist, as far as the composition of evaluation committees is concerned, in order to guarantee objectivity with respect to these points:

- ◆ minimum/maximum number of committee members
- ◆ Number of women & number of men members
- ◆ Committee members with documented training on EDI principles and anti-bias practices
- ◆ Knowledge of CoARA principles (or similar) on research evaluation
- ◆ Number of internal (i.e. affiliated to the hiring organization) vs number of external (i.e. non affiliated to the hiring organization) members

To make evaluation committees fair and representative, members should be **selected for diversity in expertise, gender, ethnicity, and career stage**, ensuring multiple perspectives are included. Committees should be **balanced in size and include both internal and external members** to reduce institutional bias and provide independent judgment. Clear **conflict-of-interest policies and structured evaluation criteria** should guide decisions, with all members trained in recognizing and mitigating implicit bias to enhance impartiality.

No single example can offer a standardised practice: what counts is that the elements mentioned in the definition and in the questions are kept into consideration. From these, each RPO usually has its own guidelines on committees' composition.

Blind Recruitment and Blind Evaluation Procedures

- Does your institution apply anonymisation of personal information (e.g. name, gender, nationality, photo) in the first round of recruitment or promotion processes?

This refers to the active practice of concealing the candidates' personal information during candidate evaluation. By hiding such information from committee members/evaluators, the intent is to make evaluation as impartial as possible, thus to reduce the influence of gender, nationality, ethnicity, and other characteristics which are unrelated to research merit.

See [UKRI \(2025\), Peer Review Interventions: A Summary](#).

Full anonymisation is not always feasible nor possible, particularly in later stages of evaluation (e.g. interviews, presentations). In these cases, institutions can complement blind procedures with structured evaluation criteria defined in advance, training for committee members, and the appointment of an independent observer (see: Gender Observer).

For practical guidance on implementing blind and structured evaluation, [see the links](#).

- Does your institution use double-blind procedures in any evaluation process (e.g. hiring, promotion, internal grant allocation)?

See [CoARA: Experiments in Assessment Catalogue – Double blind peer-review](#)

- Are evaluation committees provided with guidance on how to conduct structured, criteria-based assessments to minimise the influence of personal characteristics?

See [LERU \(2018\), Implicit bias in academia: a challenge to the meritocratic principle and to women's careers](#)

Gender Observer in Evaluation Committees

- Does your institution appoint an independent observer to monitor evaluation committees for potential discriminatory practices, is this an external or internal observer?

An independent observer can be called in order to monitor selection and evaluation committees to help ensure fairness, transparency, and compliance with equal opportunity and anti-discrimination policies.

The observer plays an important role in identifying and addressing potential biases or discriminatory practices, thereby strengthening the integrity and credibility of the selection process.

A gender-balanced committee does not in itself guarantee a bias-free process – female evaluators have been found to be equally susceptible to implicit bias as male ones.

- If yes, are observer reports formally collected and used to improve future evaluation processes?

In some national contexts, the role of the observer may be subject to legal restrictions and should be designed accordingly. An independent trained observer can flag biased dynamics in real time and provide structured feedback. This practice is already implemented at institutions such as the University of Geneva and KU Leuven.

Recognition of Career Gaps in Evaluation Procedures

- Does your institution have explicit guidelines for accounting for career gaps in evaluation and promotion procedures?

Career interruptions extend well beyond parental leave. Restricting gap recognition to maternity and paternity leave excludes a broad range of legitimate life circumstances that disproportionately affect women and other underrepresented groups. Institutions should adopt an explicitly inclusive definition of career gaps and ensure that evaluators are equipped to contextualise them.

[See the SNSF's work on Career Funding for Junior Researchers.](#)

- Do these guidelines cover grounds beyond maternity and paternity leave, including: miscarriage, stillbirth, and problematic pregnancies; pre-pregnancy medical treatments; illness and disability; caregiving responsibilities; mental health interruptions; trauma and bereavement; conflict or displacement?

[See the 'other experience' dimension in the NOR-CAM matrix.](#)

It would be ideal for your institution to consider this in its procedures.

- Does your institution use **net academic age** – career length adjusted for documented interruptions – as the reference point for evaluating research output?

[See the SNSF has also produced work on the 'net academic age', with useful examples.](#)

The concept of the **net academic age** – career length adjusted for all documented interruptions – provides a fairer baseline for comparing research outputs across researchers with different life trajectories, and is already applied by several funding agencies including the Swiss National Science Foundation (SNSF).

Forward-Looking Assessment

- Are evaluators trained on how to contextualise career gaps when assessing candidates?

- Does your institution have, at present, any debates on how to transform current evaluation criteria?

Shift the focus of evaluation from past track record to future potential, assessing the quality and feasibility of what a researcher plans to do rather than what they have already achieved.

- Does your institution include an assessment of future research plans or potential as an explicit evaluation criterion, alongside or instead of track record?
- Are evaluation criteria designed to avoid systematically advantaging researchers who have already had access to resources, networks, and prestigious positions?
- For funding decisions, is the quality of the proposed project weighted more heavily than the applicant's bibliometric record?
- Does your institution pilot or consider alternative allocation mechanisms — such as partial randomisation among equally qualified candidates — to reduce the accumulation of resources among already-privileged researchers?

See [COARA-Experiments — Forward looking assessment \(Level 0\): experiments.coara.org](https://experiments.coara.org)

[COARA- Evaluating the idea only \(Level 0\): experiments.coara.org](https://experiments.coara.org)

[The SNSF on Drawing lots as a tie-breaker](#)

[The Volkswagen foundation: a new experiment Search for Bold Research Ideas](#)

Evaluation systems based primarily on past achievements tend to concentrate resources on researchers who are already advantaged — a dynamic known as the Matthew effect. This structurally disadvantages early career researchers, researchers returning from career breaks, and those from less prestigious institutions or underrepresented groups, regardless of their actual potential. Shifting toward forward-looking criteria — assessing what a researcher plans to do and their capacity to do it — can interrupt this cycle.



PART 2

Research Funding Organizations (RFOs)

POLICIES

They shape the opportunities of diverse researchers to pursue an academic career and therefore are linked to how we assess researchers and their work.

Gender Equality Plan or other similar framework to support EDI (GEP)

- Does your organisation use a GEP, in practice, to make data-driven and informed decisions and, where necessary, mitigate disparities?

"A GEP is a set of commitments and actions that aim to promote gender equality in an organisation through institutional and cultural change".
A GEP is required to apply for EU-funding.

See: [What is a Gender Equality Plan | European Institute for Gender Equality](#).

GEP has four requirements:

- ✓ Public document signed by the top management that shows commitment to gender equality
- ✓ Dedicated resources and expertise on the topic
- ✓ Data collection and monitoring, including disaggregated data on sex and gender
- ✓ Training and action on gender equality

And five recommended areas of intervention:

- ✓ Work-life balance and organisational culture
 - ✓ Gender balance in leadership and decision-making
 - ✓ Gender equality in recruitment and career progression
 - ✓ Integration of the gender dimension into research and teaching content
 - ✓ Measures against gender-based violence, including sexual harassment
- Does your GEP include a gender-responsive budgeting (GRB) component, analysing whether financial resources (salaries, research funds, career development support) are allocated equitably across genders? Is this budget analysis made public and used to inform institutional decisions?

See, for practical guidance: [The Journey to Gender-Responsive Budgeting: Lessons Learned from Higher Education](#).

A GEP is strengthened when it includes a gender-responsive budgeting component: analysing how institutional resources are actually distributed across genders moves beyond stated commitments toward measurable accountability.

- Does your institution evaluate whether its EDI policies produce measurable change, collecting data before and after implementation and reviewing them periodically?

See: [DORA \(2025\), Practical Guide to Implementing RRA at RPOs; CoARA Experiments – Assessing Research Assessment \(Level 1\)](#).

Monitoring the presence of EDI measures is not sufficient – institutions should also assess their impact. Evidence-based review cycles, combining quantitative outcome data with qualitative feedback from researchers, allow institutions to identify what works, what does not, and where further intervention is needed.

External assessment of Gender Equality Plan (GEP) or similar framework to support EDI

- Is your GEP or equivalent document subject to an internal assessment to measure compliance and progress?

When the commitments made in the GEP or other equivalent document are reviewed by an internal or external organ to examine to what extent the objectives are achieved and how much progress is made, it strengthens progress. This ensures that stated measures are effectively implemented and that the institution is making progress on targeted objectives.

- Is your GEP or equivalent document subject to an external assessment to measure compliance and progress?

See, for instance, the approach used in the UK: [Athena Swan Charter / Advance HE, and in Ireland: Athena Swan Ireland / Advance HE](#).

In the case of Athena Swan, the achievements are recognized by an award. In some cases, reaching a certain level is required to apply for funding.

Definition working conditions for researchers (work time, pay, further education, parental leave, etc.)

- Does your organisation have guidelines defining the working conditions for researchers working on projects that you are funding?

See, for instance:

the **European Charter for Researchers** – [the code of conduct for the recruitment of researchers](#);

or, in the UK, the **Concordat to Support the Career Development of Researchers**: [researcherdevelopmentconcordat.ac.uk](#).

The main objective is to contribute to the development of attractive, open and sustainable employment opportunities for researchers. Committing to measures that create inclusive work environments contributes to establishing attractive work places for diverse talents.

In doing so, it is important to define both institutional responsibilities and supervisors'/ managers' responsibilities to enhance transparency about researchers' rights and duties when working in academia.

Support for care work

- Does your organisation have measures to support researchers with care responsibilities?

If yes, which care responsibilities are covered (unpaid care work based on personal relationship, that is caring for children, for partner, parents, or other relatives in cases of chronic illness or disability)?

- Which kind of support is offered (time vs. financial resources)?

Researchers with care responsibilities face specific challenges while pursuing an academic career / working in academia.

Inclusive work environment

- Has your organisation adopted a code of conduct to prevent gender-based violence and other forms of violence?

See, for instance, **GENDERACTIONplus paper on funders' role to counter gender based violence**: [GENDERACTIONplus_Position-Paper-4_Ending-gender-based-violence.pdf](#).

The GENDERACTIONplus position paper 4 highlights that "by acknowledging their responsibility for ensuring that R&I does not support potential perpetrators of gender-based violence, RFOs will directly help to protect potential victims and, because of this, will foster high-quality research and education."

They recommend taking the following steps:

- ✓ Develop core procedures within RFOs
- ✓ Build strong partnerships with other stakeholders
- ✓ Ensure continuous knowledge and awareness raising
- ✓ Establish long-term funding for research on gender-based violence

- Does your organisation have procedures to report cases of misconduct (ombudsperson, trust person, whistleblowing)?

See, for instance, the approach used by FWF in Austria: [fwf_promoting_inclusive_researchculture.pdf](#).

Defining what is expected from the research community and offering the possibility to report cases directly to the RFOs strengthens the creation of safe working environments. Some researchers might fear retaliation when reporting sexual harassment, sexual or sexist violence, or discrimination. Offering the opportunity to report anonymously might open the possibility to identify problematic behavior and enhance willingness to speak up.

- **Does your organisation require that partner organizations adopt a code of conduct addressing gender-based violence and other forms of violence in order to apply for and obtain funding?**

The zero tolerance code of conduct states its aim to: *"provide guidance to Member States, stakeholders, and individuals on how to create a European Research and Innovation (R&I) environment free from all forms of gender-based violence, based on the values of gender equality and inclusiveness, respect, dignity and safety."*

See, for instance a zero tolerance code of conduct: [Counteracting Gender-Based Violence, including Sexual Harassment, in the EU Research and Innovation System](#); or the European code of conduct for scientific research integrity: [european-code-of-conduct-for-research-integrity_horizon_en.pdf](#).

The targeted audience and aims of the zero tolerance code of conduct are "to prevent and address incidents of gender-based violence in research and higher education settings." The document aims to:

- ✓ Ultimately prevent the occurrence of gender-based violence in higher education and research organisations;
 - ✓ Effectively counter all forms of gender-based violence by providing specific procedures to combat and address it;
 - ✓ Support the institutional changes in research and innovation organisations that are necessary to build safe and inclusive work environments;
 - ✓ Raise awareness of and sensitivity to all forms of gender-based violence;
 - ✓ Provide assistance and support to institutions and organisations involved in the European research and innovation system in setting internal policies and related documents;
 - ✓ Provide assistance and support to employees and students and to anyone who comes into contact with higher education institutions and research institutions.
- **Does your organisation require that partner organizations have adopted policies to create accessible work environments (e.g., with the aim to remove barriers for people with disabilities)?**

See for instance, [Disability-inclusive laboratories in the chemical sciences](#).

- **Does your organisation offer support for researchers with disabilities when they are applying for funding?**

See for instance, [Disability-related support for applicants – Funding Guidance | Wellcome](#).

- **Does your organisation offer financial support to researchers with disabilities?**

See for instance, [Researchers with Disabilities or Long-Term Illnesses in DFG Funding Procedures | DFG](#).

Researchers with disabilities face more barriers in their day to day work. Some institutions address these issues and have adopted overall frameworks or specific measures to remove barriers. Funding agencies can encourage this by requiring partner institutions to have such a framework in place.

Funding agency can also offer support directly to researchers with disabilities, for instance providing guidance and/or support during the grant writing process or by providing additional funding for the research project or longer project duration.

DATA AND MONITORING

EDI data allows us to assess diversity in the research community and to identify marginalization processes that might be at play.

Disaggregated data collection

- Does your organisation collect sociodemographic data on applicants? If yes, which dimensions of diversity are covered (sex, gender, age, nationality, ethnic background, migratory background, disabilities, etc.)?

Disaggregated data allows to monitor and analyse the integration of EDI dimensions in research performance of organizations, considering that there is a significant imbalance which tends to discriminate against minorities and women.

See: [She Figures 2024 \(European Commission\): op.europa.eu;](https://op.europa.eu/en/publication-detail/-/publication/14548157)
[CoARA WG ACA \(2025\), Mapping ACA reform initiatives: Survey outcomes: zenodo.org/records/14548157;](https://op.europa.eu/en/publication-detail/-/publication/14548157)
[NIFUNY Eval project \(Norway\) – longitudinal tracking of CoARA/NOR-CAM implementation: coara.org.](https://coara.org/)

Ideally, the EDI office of the organisation should be able to construct a database of disaggregated sociodemographic data dedicated exclusively to information on the amount of the organisation's population belonging to groups that tend to be more discriminated against than others.

Cross-sectional data — showing the proportion of women and men at a given point in time — is insufficient to identify where and why gender gaps emerge. Longitudinal data, tracking cohorts over time, allows institutions to pinpoint the specific career stages at which women disproportionately leave academia or stall in progression. Evidence consistently identifies the post-PhD transition as a critical bifurcation point, but this is only visible through time-series analysis.

- Does your institution collect EDI data longitudinally, tracking the same cohorts of researchers over time rather than only taking cross-sectional snapshots?
- If yes... Does your institution monitor at which career stage the gender gap widens most significantly (e.g. post-PhD transition, promotion to senior roles)?
- Are longitudinal findings used to identify structural bottlenecks and inform targeted interventions?
- Are the indicators you collect actively used to assess the effectiveness of EDI interventions, and are interventions adjusted based on this evidence?

See: [She Figures 2024 \(European Commission\): op.europa.eu;](https://op.europa.eu/en/publication-detail/-/publication/14548157)
[CoARA WG ACA \(2025\), Mapping ACA reform initiatives: Survey outcomes: zenodo.org/records/14548157;](https://op.europa.eu/en/publication-detail/-/publication/14548157)
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- Are the indicators you collect actively used to assess the effectiveness of EDI interventions, and are interventions adjusted based on this evidence?
- Does your organisation collect sociodemographic data on reviewers? Which dimensions of diversity are covered (sex, gender, age, nationality, ethnic background, migratory background, disabilities, etc.)?



See for instance, in Canada, [the Canadian Institutes of Health Research publish a list of all peer reviewers: College of Reviewers – Membership List – CIHR](#).

In order to ensure an accurate monitoring of the organisation's attempts to reduce biases, it is recommended that organisations collect data on the reviewers who appoint new staff, whether administrative, researcher or teaching.

Data publication

- Does your organisation publish descriptive statistics on researchers?

See for instance, [the SNSF publishes analyses focused on specific topics: Early career stage: do female and male researchers have equal access to funding?](#)

- Does your organisation publish analyses on researchers?
- Does your organisation publish descriptive statistics on reviewers?
- Does your organisation publish analysis on reviewers?

Descriptive statistics usually provide a useful summary of a dataset, explaining major trends such as dispersion, frequency and so on.

This allows an organisation to fully grasp developments across time and act upon challenges in order to meet its EDI objectives.

Data available following FAIR principles and GDPR guidelines

- Does your organisation make data available building on the principles of FAIR and the GDPR regulations?
- Does your organisation publish data in an open data repository?

See: [FAIR Principles – GO FAIR and General Data Protection Regulation \(GDPR\) – Legal Text](#).

Allowing access to data enables the research community to further analyze the current situation and identify potential for improvements. This should be done following the FAIR principles stating that scientific data should be Findable, Accessible, Interoperable, and Reusable. Moreover, at the European level, they would have to comply with the GDPR regulations. In other contexts, with existing regulations on Data Protection. Making data available corresponds to best practices and existing policies on open data and open research. Useful platforms for publishing data include: [Zenodo](#), [GitHub](#), [research data repositories](#), the organisation's website, online dashboards.

Data analysis and use

- Does your organisation follow indicators to evaluate the effectiveness of your measures for diversity and inclusion? If yes, on which dimensions of diversity and inclusion?

See: The [Swiss National Science Foundation \(SNSF\)](#), for example, has carried out [detailed analyses of gender and other potential biases in peer review](#). The review concludes that there is no gender bias in funding access for SNF grants, and all the data and analysis is made publicly available, guaranteeing transparency.

Ensuring that specific persons and/or organs are in charge of following indicators enhances the impact of data collection by ensuring that available information are used to inform decision-making processes.

It also enables institutions to move from strategic decisions to implemented changes.

EVALUATION PROCESSES

These measures are at the core of how we assess researchers and allocate funding. Therefore, they require close scrutiny to develop inclusive practices.

Responsible research assessment

- Did your organisation sign the DORA Declaration of responsible research assessment?

DORA is a global initiative that campaigns for and supports improving ways we assess research and researchers.

See: [Home | DORA](#).

DORA calls for a responsible use of metrics. The aim is to reflect on and develop practical tools to set a qualitative assessment of researchers and the outputs of their research at the core of their evaluation.

- Did your organisation sign the agreement and join the coalition for advancing research assessment?

The Coalition for Advancing Research Assessment (CoARA) is a collective of organisations committed to reforming the methods and processes by which research, researchers, and research organisations are evaluated. Current research assessment methods rely heavily on publication-based metrics such as citation counts, and often fail to recognise the wide array of contributions made by researchers.

See: [CoARA – Coalition for Advancing Research Assessment](#).

Researchers take on multiple activities, roles and responsibilities for their research and for their institution. These include teaching, supervision of students and/or Early Career Researchers, engagement with different sectors of society, and institutional activities. In order to recognize the intrinsic value of these multiple tasks, as well as their contribution to research quality, to research findings dissemination, to research far-reaching impact, and to the training of students and researchers.

- Has your organisation developed measures to implement responsible research assessment?

See for instance the online course proposed by DORA: [Introduction to Responsible Research Assessment Course | DORA](#).

- Has your organisation developed measures to reform research assessment?

See for instance the example from Finland: [National recommendation for good practice in research evaluation \(2020\)](#) and [National steering group for responsible assessment](#).

Narrative CVs

- Does your organisation use narrative CVs?

See for instance, [Why researchers should consider a narrative CV | THE Campus Learn, Share, Connect](#).

The narrative CVs is one tool to move away from a narrow focus on publications and research funding. Also with the aim to move away from a quantitative presentation of achievements and focus more on key contributions that are described in qualitative terms.

- If you use narrative CVs: does your institution provide guidance or templates to help candidates – especially those from underrepresented groups – write effective narrative CVs?

- Does your organisation train evaluators on how to assess narrative CVs consistently, avoiding advantages for researchers with stronger academic writing skills?
- Does your institution combine narrative CVs with structured evaluation criteria to limit the influence of writing style on assessment outcomes?
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See, for instance this example from Finland: [Template for researcher's curriculum vitae / Finnish National Board on Research Integrity TENK](#). For instance, several funding agencies as sponsor, the MCAA and Young Academy of Europe opened a free platform of peer-to-peer mentoring with narrative CVs: <https://pep-cv.mariecuriealumni.eu/>. Frith (2025), Breaking Barriers – impact of narrative CVs on underrepresented researchers, funded by EDICA: sfdora.org; Research Professional News (2025), Narrative CVs risk worsening the biases they aim to redress: researchprofessionalnews.com; DORA (2021), Using Narrative CVs: Process optimization and bias mitigation: sfdora.org; MCAA/YAE peer mentoring platform for narrative CVs: pep-cv.mariecuriealumni.eu.

Narrative CVs are a promising tool, but evidence shows they carry risks if not carefully implemented. Researchers from underrepresented groups – including women, ethnic minorities, and early career researchers – report significant barriers to adopting the narrative format, including unfamiliarity with the expected language and anxiety about self-promotion. Furthermore, narrative CVs may inadvertently favour confident self-narrators, potentially compounding existing advantages rather than reducing them.

To mitigate these risks, institutions should pair narrative CVs with structured criteria, provide writing support to candidates, and train evaluators explicitly on how to assess narrative content without being influenced by writing style.

Accessibility and inclusivity of published calls

- Does your organisation assess how accessible the published calls for funding are?
- Does your organisation review and assess the funding calls to make sure the language is accessible and gender inclusive?

See, for instance, [Improving pre-award processes for equitable and transparent research assessment / DORA](#).

It is important to consider all steps in the funding process, starting from the timing of the funding call and considering also the language used and implicit messages related to the target group. This is important to avoid the Matthew effect – research funding goes to those who have already obtained funding.

Recognition of multiple research tasks

- Do you use other approaches that allow researchers to present a wide range of achievements?

See for instance, in The Netherlands, [the Position paper 'Room for everyone's talent' / NWO and the associated initiative Recognition & Rewards – Recognition & Rewards](#); or, in Finland, [National Recommendation for the responsible evaluation of a researcher / Responsible Research](#).

In some countries, higher education institutions, funders, and academies have worked together to develop guidelines for the recognition of a broad range of tasks and activities that are used across institutions. This ensures that institutions are aligned with regards to what they expect from researchers.



In practice, when researchers apply for funding and for positions, they can use a common language to describe their key achievements and contributions to science.

EDI in the funding cycle

- Is your organization supporting inclusive gendered innovation throughout the funding cycle?

See: the tool developed by INSPIRE presents the different steps of the funding cycle and measures, [Support Package 5 – “Inclusive Gendered Innovation” – For Funders | INSPIRE project.](#)

The funding cycle includes different steps that all contribute to fair and equitable allocation of funding. The tool prepared by the INSPIRE team allows working on ten decisive steps in the funding cycle and understanding what are the key decisions that would support inclusive gendered innovation at each step.

Transparent criteria used to assess funding applicants

- Does your organisation share the evaluation criteria with the evaluators in precise guidelines?
- Does your organisation make the evaluation criteria available to researchers who apply for funding?

See also https://genderaction.eu/wp-content/uploads/2025/05/GENDERACTIONplus_Inclusive_Funding_RFO-Guideline.pdf.

This enables the research community to understand how to move from abstract principles to specific evaluation criteria while also ensuring transparency throughout the process.

Inclusive knowledge production

- Does your organisation assess to what extent researchers engage with sex and gender in knowledge production, research content, and innovation?

Inclusive research relates to the integration of diverse perspectives and experiences into R&I, to ensure that the design, implementation and outcomes reflect the needs/perspectives of different groups.

See, for instance, [GENDERACTIONplus_D4.3_Report-on-policy-coordination-across-MS-and-AC-andpromising-practices-to-advance-the-gender-dimension-in-RI-in-the-ERA.pdf](#).

GENDERACTIONplus defines inclusive knowledge production as:

- ✓ “The gender dimension in R&I and sex/gender analysis refer to the use of sex and/or gender aspects – when appropriate – in all phases of a R&I project. This means taking into account the biological characteristics (sex) of women, men and intersex persons and the – changing – social and cultural features (gender) of women, men and non-binary and transgender people.”
- ✓ Intersectionality describes overlapping or interdependent systems of discrimination related to age, disabilities, ethnicity, gender, geographical location, sex, socioeconomic status, sexuality, etc.
- ✓ Inclusive research has clear added value in that all individuals, regardless of their socioeconomic status, ethnicity, age, social background, (dis)ability, sex or gender, are considered throughout the research process, from design to data collection and analysis and dissemination of the results.

Valorization of societal impact and stakeholder uptake

- Does your organisation take societal impact, stakeholder uptake, and the actual results of a project into account whenever relevant when evaluating researchers?

See, for instance, [Press Release: CoARA Calls for Societal Impact to Become a Core Criterion in Research Assessment in its Recent Publication – CoARA](#).

In order to capture the full value of research for society, it is important to move beyond a narrow focus on some scientific outputs and outcomes. For instance, CoARA calls for a recognition of the societal impact of science. They propose six guiding principles:

- ✓ prioritising societal relevance
- ✓ embracing pluralism
- ✓ planning for impact from the outset
- ✓ co-creating with stakeholders
- ✓ evaluating both benefits and risks
- ✓ balancing accountability with learning through proportionate, auditable evidence

Academic age

- Does your organisation use academic age to establish eligibility windows/ periods? If so, can researchers deduce time for care responsibilities, working outside of academia, part time work, national military service, sick leave, etc.?
- Does your organisation use academic age to assess track records?
- If so, can researchers deduce time for care responsibilities, working outside of academia, part time work, etc.?

See for instance, in Switzerland, the SNSF approach to calculating net academic age: [SNSF net-academic-age.pdf](#).

Not all career paths are linear, running directly from PhD to postdoctoral research and professorship.

Taking into account academic age and allowing researchers to deduce periods of time spent working in other sectors, fulfilling care duties or other activities creates opportunities for researchers with non-linear career paths to compete for funding.

Selection of evaluators (reviewers and panel members)

- Does your organisation have guidelines for having diverse reviewers?
- Does your organisation have guidelines for setting up diverse panels for evaluation bodies?

More diverse reviewers are core for the ability to assess more inclusive excellence. They can bring in multiple perspectives, avoiding that one approach is dominant for the funding decision and counteracting confirmation bias, the tendency to give more weight to information that aligns with one's own pre-existing beliefs. If values and backgrounds are diverse, this bias becomes less influential (DORA). Including international researchers in national panels mitigates the risk for Conflict of Interest and nepotism (Schiffbänker et al. 2024).

See for instance, [NSERC Guidelines Governing Membership of NSERC's Peer Review Committees](#) | [Natural Sciences and Engineering Research Council of Canada](#).

- Does your organisation use quotas for evaluation panel composition? If yes, which dimensions of diversity are covered by quotas?

Evaluators' training (reviewers and panel members)

- Does your organisation have guidelines for evaluators?
- Does your organisation offer bias training to evaluators?

See for instance, the training developed by the Canadian federal research funding agencies, [Biases in the Research Ecosystem.cpt](#) and [Excellence in Peer and Merit Review](#).

- Does your organisation provide feedback to evaluators?

- Does your institution assess whether bias awareness training produces measurable change in evaluation practices, for example through pre/post surveys or monitoring of evaluation outcomes over time?

In order to facilitate the implementation of fair and inclusive approaches to researchers' evaluation, it is important to offer clear guidelines to evaluators, as well as training and feedback. This sets into motion a learning process and ensures that core principles are effectively used to allocate funding.

Other evaluation approaches

- Does your organisation use some form of random selection to allocate funding? If so, does your organisation use random selection before peer-review? Does your organisation use this approach across funding instruments or for specific funding instruments?

Random selection can be used at different stages of the funding process, for instance before or after peer review, to reduce biases in the allocation of funding.

See for instance: [*Lottery before peer review is associated with increased female representation and reduced estimated economic cost in a German funding line - WU Wirtschaftsuniversität Wien*](#);
 CoARA Experiments – [*Forward looking assessment \(Level 0\): experiments.coara.org*](#);
 CoARA Experiments – [*Evaluating the idea only \(Level 0\): experiments.coara.org*](#);
 SNSF, Drawing lots as a tie-breaker: [*snf.ch*](#);
 VW Foundation, Experiment! Search for Bold Research Ideas: [*volkswagenstiftung.de*](#).

Evaluation systems based primarily on past achievements tend to concentrate resources on researchers who already obtained funding – a dynamic known as the Matthew effect. This structurally disadvantages early career researchers, researchers returning from career breaks, and those from less prestigious institutions or underrepresented groups, regardless of their actual potential. Shifting toward forward-looking criteria – assessing what a researcher plans to do and their capacity to do it – can interrupt this cycle.

Applicants express interest to submit a proposal and a short summary of the project, those who are invited to write a full proposal are randomly selected. Testing of this approach shows that:

- ✓ It reduces the cost of the allocation process by limiting the number of submitted projects
- ✓ It increased the share of female applicants and female-led funded projects

There are further arguments suggesting that this approach might also lead to more innovation in the proposed projects.

- Does your organisation use partial randomisation to allocate funding? If so, does your organisation use this approach across funding instruments or for specific funding instruments?

Partial randomisation among equally qualified candidates is one concrete mechanism to reduce accumulation bias: after top-ranked proposals are funded, remaining eligible applications are selected randomly rather than ranked in further detail, preventing minor differences in prestige or track record from determining outcomes.

See for instance, example from UKRI [*UKRI-170725-PeerReviewInterventionsSummary.pdf*](#) or from the [*SNSF Drawing lots as a tie-breaker*](#).

In partial randomisation, typically after the highest-ranked proposals have been funded, a subset of the applications under consideration for funding are selected for funding at random rather than being individually ranked in detail. This prevents biases and discrimination to define who will receive funding among projects of similar quality.

- Does your organisation use double-blind peer review systems?

See for instance, [UKRI-170725-PeerReviewInterventionsSummary.pdf](#);
[Double-Blind Reviews: A Step Toward Eliminating Unconscious Bias - PMC](#).

Knowing the gender, the nationality or ethnic background of the applicant might lead to biases in how the research is assessed. Double-blind peer reviews have the potential to counteract bias in research funding decisions that are associated with applicants' personal characteristics.

- **Does your organisation use distributed peer review?**

In distributed peer review applicants assess and review other proposals submitted to the same funding opportunity.

See UKRI guidelines for distributed peer review: [BBSRC-180925-DPR-Guidanceforapplicants.pdf](#); the assessment of the first trial: executive summary - [A year in metascience \(2025\) - GOV.UK](#); RoR article: [Applicants as reviewers? Here's how it can work - Research on Research](#).

Applicants assess and review other proposals submitted to the same funding opportunity. They agree to act as reviewers and to have their proposal reviewed by their peers.

Expected benefits:

- ✓ Improving the speed and quality of feedback available to applicants
- ✓ Increasing the consistency and expertise of reviews
- ✓ Benefitting from a larger pool of reviewers
- ✓ Proposals are reviewed a greater number of times

Observed benefits:

- ✓ Shorter assessment and decision-making process (3-months faster)
- ✓ Reduced work for funder's staff
- ✓ Process contributes to applicants' knowledge of the field and grant writing skills
- ✓ By adding reviewers, the scoring consistency is increased.

- **Does your organisation offer feedback to researchers from marginalized groups who did not obtain funding?**

The amount and quality of support received by applicants in writing their grants varies by higher education institution (e.g., larger, more prestigious offer more support to applicants through grant offices for instance) and by interpersonal networks (e.g., benefitting from the support of a mentor or sponsor who has experience in acquiring grants). Offering feedback to unsuccessful applicants from marginalized groups might contribute to increased success rates over time among this group of applicants.

- **Does your organisation provide an inclusive definition of excellence that translates into evaluation practices?**

See, for instance, [The SNSF's model of excellence](#).

The notion of scientific excellence often remains vaguely defined and under conceptualized. Thus, limiting the possibilities to assess researchers and their research in fair and transparent ways. Explicitly defining excellence and aiming to promote an inclusive definition of excellence support the creation of fair, transparent and inclusive work environments.

Recognition of Career Gaps in Evaluation Procedures

- **Does your organisation extend eligibility windows (e.g. years post-PhD) for applicants who have experienced career interruptions, covering grounds beyond parental leave (illness, disability, caregiving, trauma, conflict, displacement)?**

Ensure that career interruptions are explicitly accounted for in hiring, promotion, and funding evaluation processes, regardless of their cause. This means ensuring equitable access to funding and fair evaluation of outputs.

See, for instance: Swiss National Science Foundation (SNSF): [analysis of career breaks](#); NOR-CAM – Other experience dimension: [uhr.no](#); CoARA Experiments – Forward looking assessment (Level 0): [experiments.coara.org](#).

Career interruptions extend beyond parental leave, hence it is important to take into account a broad range of legitimate life circumstances that interrupt careers and that disproportionately affect women and other underrepresented groups. Institutions should adopt an explicitly inclusive definition of career gaps and ensure that evaluators are equipped to contextualise them.

Transparent communication of these provisions in calls for proposals ensures that eligible researchers are aware of and can benefit from them.

- **Does your organisation apply the concept of net academic age when evaluating applicants' track records, adjusting for documented career interruptions?**
- **Does your organisation offer supplementary funding or budget flexibility to researchers returning from career interruptions (e.g. to cover childcare during mobility, hire a technician, or attend conferences)?**
- **Does your organisation allow no-cost extensions or temporary suspension of active grants in case of career interruptions, without penalty for the grant holder?**
- **Does your organisation monitor whether success rates in funding applications vary systematically between applicants with and without documented career gaps? Are these provisions explicitly communicated in all calls for proposals?**

The concept of net academic age – career length adjusted for all documented interruptions – provides a fairer baseline for comparing research outputs across researchers with different life trajectories, and is already applied by funding agencies like the Swiss National Science Foundation (SNSF).

Gender Observer in Evaluation Committees

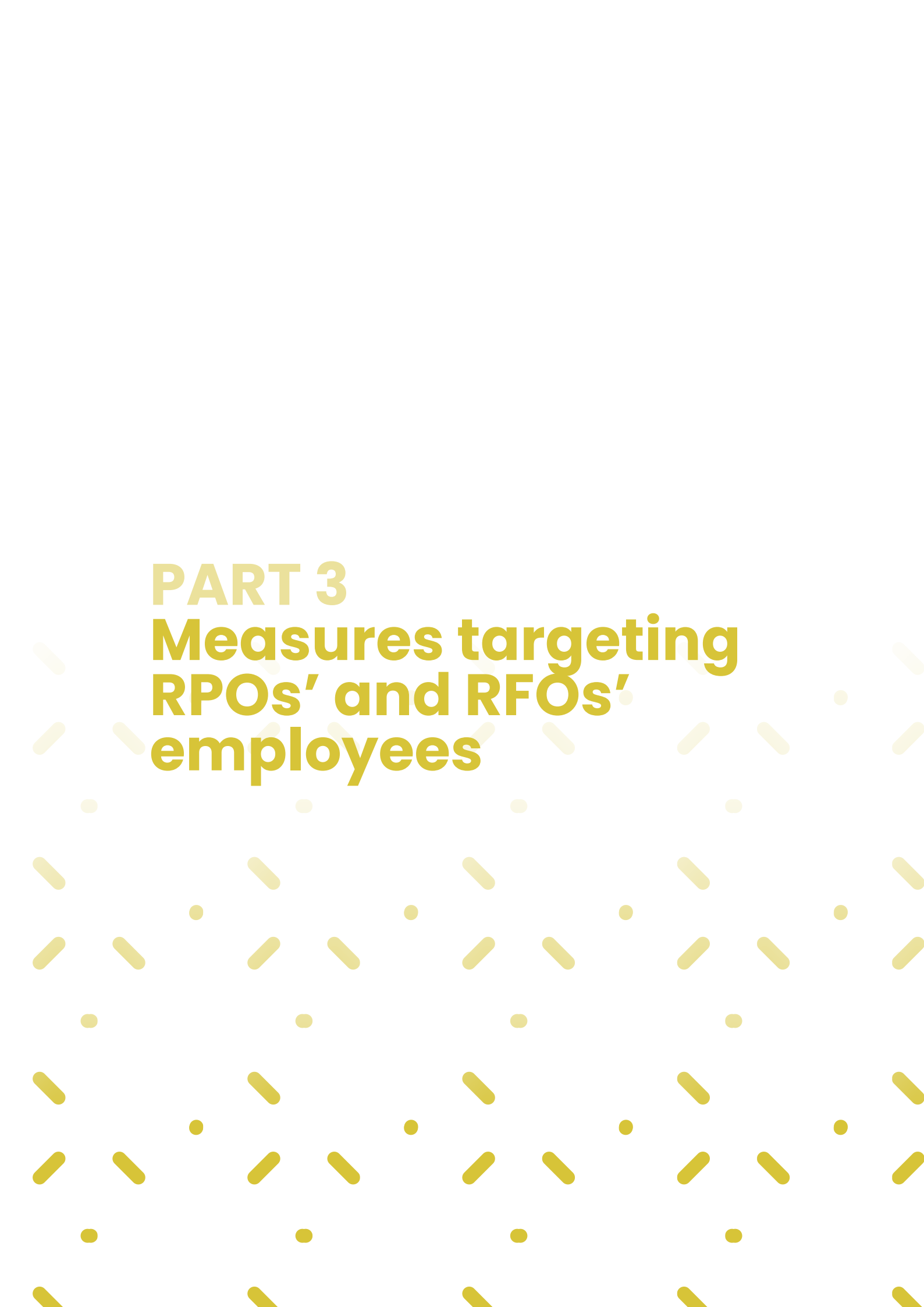
- **Does your institution appoint an independent observer to monitor evaluation committees for potential discriminatory practices? If yes, is the observer external to the department or unit being evaluated?**
- **Are observer reports formally collected and used to improve future evaluation processes?**

Appoint a trained independent expert to observe evaluation processes and report on potential bias in selection or promotion procedures.

See: LERU (2018), *Implicit bias in academia*: [leru.org](#); CoARA Experiments – Acknowledging bias, making it transparent (Level 0): [experiments.coara.org](#).

A gender-balanced committee does not in itself guarantee a bias-free process – female evaluators have been found to be equally susceptible to implicit bias as male ones. An independent trained observer can flag biased dynamics in real time and provide structured feedback. This practice is already implemented at institutions such as the University of Geneva and KU Leuven.

Note: in some national contexts, the role of the observer may be subject to legal restrictions and should be designed accordingly.



PART 3

Measures targeting RPOs' and RFOs' employees



This part of the self-assessment tool focuses on RPO and RFO employees.

It is important to consider internal EDI policies since they have repercussions on the evaluation processes (specific profile of staff participating in the evaluation processes, the kind of biases they bring in, and the signals that they send about the institution). Moreover, the internal policies signal to the research community what the RPO or RFO cares about and which work culture it promotes internally.

POLICIES

Diverse workforce

- **Does your organisation have guidelines to promote a diverse work force?**
- **Has your organisation set objectives to establish a diverse work force?**

Having a diverse workforce within the funding agency shows commitment to diversity and adherence to the principles that are expected from funded partners. Moreover, marginalized researchers realize that they can receive support and advice from staff who might face similar challenges in their daily life and working environments.

Inclusive work environment

- **Does your organisation have guidelines or code of conducts to promote an inclusive work culture?**

Building inclusive work environments requires efforts from everyone: team leaders need to be trained in inclusive leadership and staff need to understand expected behaviors from everyone to be able to adopt inclusive behaviors, adapt a learning mindset, and lead sensitive conversations with colleagues about inappropriate behaviors.

- **Is the work environment in your organisation designed to be inclusive and accessible to people with disabilities (e.g., barrier-free work environment for people with disabilities)?**

Are your facilities accessible to people in a wheelchair? Can people who have a vision impairment navigate easily in the building? Are meetings accessible to deaf people? These are some of the questions that are relevant to create inclusive work environments for employees with disabilities.

Parental leave

- **How generous is parental leave for both parents in your country?**

If the legal framework applicable to your institution offers limited opportunities to take parental care duties, do you offer more than what the law requires?

- **If the legal framework applicable to your institution focuses on one parent, do you take measures to support the other parent?**

Having inclusive policies for staff working within your institutions signals that you aim to be an exemplary employer and that you adopt and implement measures that you promote for academic work environments.

Sick leave

- **How does your organisation protect employees in case of chronic illness or diseases?**
- **Some mental health, chronic illnesses or diseases are not yet taken into account and covered by existing social policies, do you offer support measures to employees with specific needs?**

Having inclusive policies for staff working within your institutions signals that you aim to be an exemplary employer and that you adopt and implement measures that you promote for academic work environments.

DATA AND MONITORING

Disaggregated data collection

- Does your organisation collect sociodemographic data on employees? Which dimensions of diversity are covered (sex, gender, age, nationality, ethnic background, migratory background, disabilities, etc.)?

Disaggregated data is important for allowing your organization and/or national/international organs to monitor and analyse the respect of EDI dimensions in research performance organizations, considering that there is a significant imbalance which tends to discriminate against minorities and women.

Ideally, the EDI office of the organisation should be able to construct a database of disaggregated sociodemographic data dedicated exclusively to information on the amount of the organisation's population belonging to groups that tend to be more discriminated against than others.

Data available following FAIR principles and GDPR guidelines

- Does your organisation make data available building on the principles of FAIR and the GDPR regulations?
- Does your organisation publish data in an open data repository?

See: [*FAIR Principles – GO FAIR and General Data Protection Regulation \(GDPR\) – Legal Text.*](#)

Allowing access to data enables the research community to further analyze the current situation and identify potential for improvements. This should be done following the FAIR principles stating that scientific data should be Findable, Accessible, Interoperable, and Reusable. Moreover, at the European level, they would have to comply with the GDPR regulations. In other contexts, with existing regulations on Data Protection. Making data available corresponds to best practices and existing policies on open data and open research.

Data analysis

- Does your organisation use data to set objectives and political strategies?

Ensuring that specific persons and/or organs are in charge of following indicators enhances the impact of data collection by ensuring that available information are used to inform decision-making processes. It also enables institutions to move from strategic decisions to implemented changes.

INCLUSIVE SKILLS

Gender and bias training

- Does your organisation offer training for your employees on gender and biases?

Regular feedback on all aspects related to EDI

- Does your organisation offer regular feedback on EDI related aspects?

Inclusive leadership

- Does your organisation train team leaders to be inclusive leaders?

Anti-racist principles

- Does your organisation have guidelines on anti-racist principles for office work and collaborations?



See, for instance: [Wellcome's anti-racist principles, guidance and toolkit / Wellcome](#).

Guidelines on inclusive language and gender inclusiveness

- Does your organisation have guidelines presenting how to write gender neutral and/or gender inclusive text?
- Does your organisation have guidelines on how to welcome and address people of all gender?

Establishing inclusive work environments for people who work in RPOs and RFOs shows alignment and compliance with promoted values for research. Moreover, it creates welcoming environments for researchers who reach out to gather information, submit applications, or visit the institution for interviews. Inclusive leadership requires, for instance, to reflect on and understand one's own biases and preferences, to adapt the format of meetings as well as the inputs presented and the participation required from different team members. Inclusive leadership can be supported by guidelines presenting best practices on different topics.



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