



## Using the Roadmap: A How-To Guide

### Introduction

The Diversity, Equality and Inclusion (DEI) Roadmap is a framework of guidance and support for member bodies at all stages of their diversity work. It is designed to help develop a plan and signpost to relevant good practice resources, initiatives and guidance. The intention is that the Roadmap will be made publically available and continue to evolve.

There are three levels to the Roadmap:

- i) The Schema. This top-level flow diagram is designed to help organisations understand where they are on the diversity journey and which actions to take next.
- ii) The Questions. The Roadmap Working Group has developed an extended set of questions associated with each stage on the Roadmap. These are to support action in each of these areas, setting out the main questions organisations should be asking themselves and suggesting areas of investigation or action. They have been designed so that each stage can be accessed separately, depending on how far work has already progressed, or used as a complete guide from beginning to evaluation of schemes.
- iii) The Resources. This extensive spreadsheet signposts to good practice resources and initiatives, with a worksheet corresponding to each stage of the Schema. The resources are being reviewed by member organisations and working group members to ensure organisations can easily find resources that will be most valuable to them.

The Roadmap will be a living document, evolving as the Science Council and Declaration signatories pursue their diversity aspirations. Member bodies are encouraged to input ideas for new content and review resources they have used.

### Using the Schema

Use the schema to determine which stage of the journey the organisation is on, then to identify potential next steps for developing or improving a programme of work supporting DEI.

### Using the Questions

The questions can be used to assist organisations in planning their DEI activity by suggesting areas of consideration such as resource planning, staff responsibility, and future planning.

### Using the Resources

The resources can be used to gain good practice guidance and ideas, as the worksheets include toolkits, case studies, reports and reviews all relating to DEI action.

### How to share learning and best practice

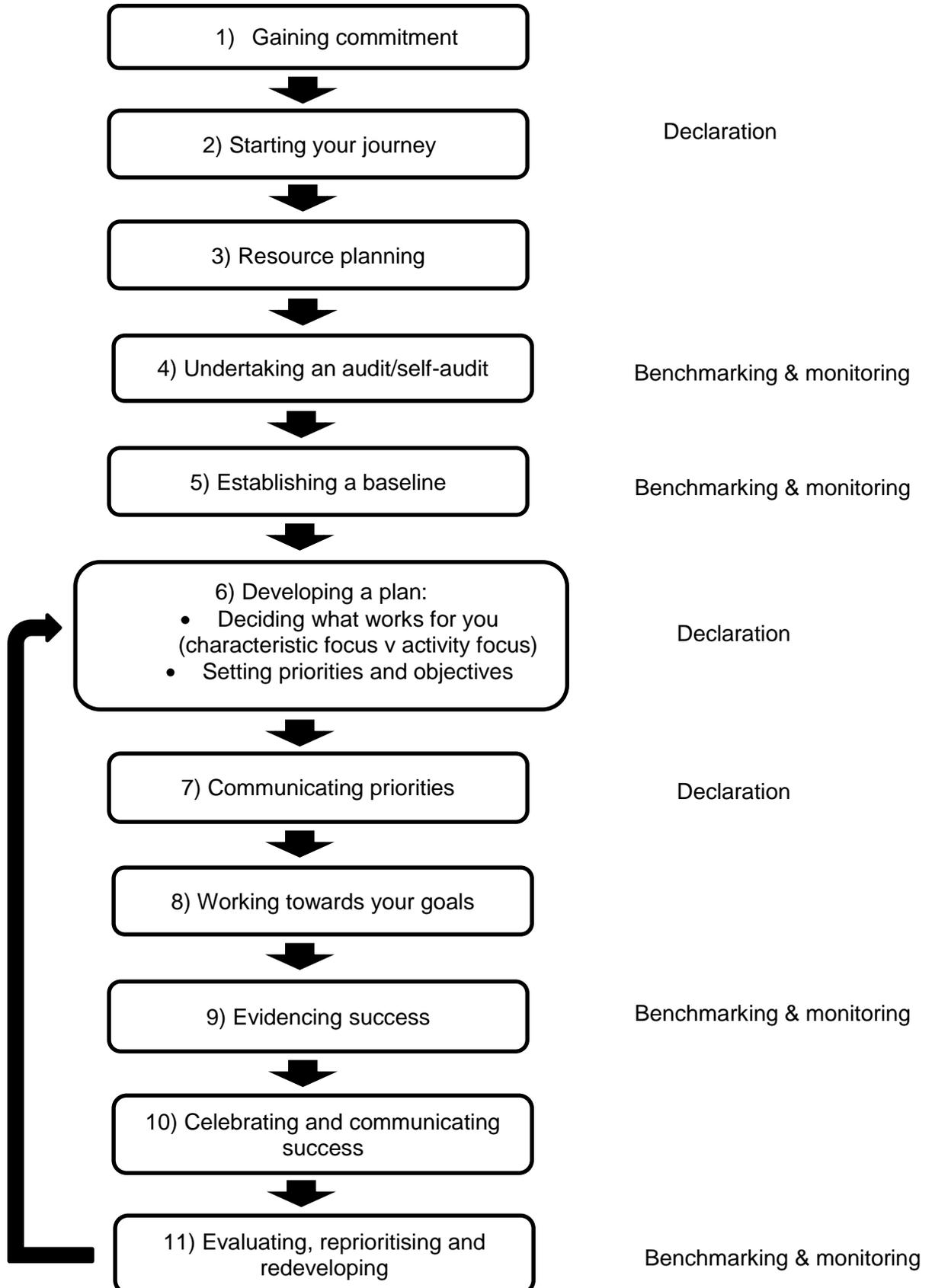
Input to the Roadmap, which could include: leaving reviews or comments on resources; uploading new resources and case studies; expanding on the Questions to include more aspects of planning; sharing personal experience of using the Roadmap/ diversity action. There will also be opportunities to share learning and progress via workshops and the Science Council's annual report.

### Contact

If you have any further queries on using the Roadmap or the Science Council's DEI project please contact Nicola Hannam ([n.hannam@sciencecouncil.org](mailto:n.hannam@sciencecouncil.org)) or Sarah Harris ([s.harris@sciencecouncil.org](mailto:s.harris@sciencecouncil.org))

The draft schema below forms the high level outline of the 'roadmap' with a series of suggested stages for developing a programme of work to support diversity, equality and inclusion. Each stage of the roadmap will be linked to guidance, existing resources such as toolkits, example initiatives and case studies.

Links to:



Expansion to support reflection:

<b>1) Gaining commitment</b>	
<b>Issue</b>	<b>Questions to consider</b>
Timing	Does this fit in with your strategic planning cycle? What are the external and internal pressures for change? Who will champion the cause – is there a natural volunteer/will you have to persuade someone?
The rationale	What will drive change in your organisation? What will the benefits be? Who will allocate the necessary time and resources to do this work?
Engaging all	How are you going to engage senior management and ensure buy-in? How are you going to engage all staff? Who else do you need to engage? Members? Your wider community?

<b>2) Starting your journey</b>	
Declaration	Have you gained board-level commitment to DEI and signed the Declaration? Have you appointed a Diversity Champion?
Developing the vision	In an ideal world, where do you want to be in 2 years, 5 years, 10 years' time?
Managing the work	Do you need to establish a committee or forum to oversee this work? Who will take responsibility for making sure that actions happen? Who is actually going to do the work? Do they have time, resources and expertise? What are the limitations? Will you start off in one area and work to others, or tackle multiple issues at once?
Getting help	What areas are you strong on and what areas will you need help with? Where will you go for help? Do you need to buy in expertise or can you access networks/support/shared learning?

<b>3) Resource Planning</b>	
Personnel	What expertise is already within your organisation? Who will take overall responsibility within the organisation? Who will be implementing the actions? Who will be the 'diversity champion'? Who will provide input from the membership/wider community? How will all these people work with, and report to, each other (e.g. Committees, working groups)? How will staff across different sections of the organisation be involved (e.g. HoD meetings)? Do these people have the time, resources and expertise to be involved? Do they support the diversity aims? Are there any networks you can tap into for guidance? Will you need to buy in expertise and/or recruit more staff?
Time	Do your aims have a specific end-date? How does this end-date tie in with typical events in the calendar? Will you set appropriate short-, medium-, and long-term objectives? Will you need to set aside some time for these within the work plans of the individuals responsible for this area? Will you build in time for research, gathering materials, securing expertise, training etc.? Will you schedule in regular meetings to review progress and adapt work plans if necessary?
Materials	What is your organisation already doing in this area i.e. what materials already exist and will these need reviewing? If you're planning to monitor diversity, what platforms do you already have to facilitate this (i.e. membership applications, event tickets, web survey accounts) or will you need to obtain these? What existing forms can you look at for ideas? If benchmarking, will you need to obtain baseline measures elsewhere and how? Will you need assistance in analysing the data? If reviewing practice, which policies/procedures/activities will you prioritise and are there examples of good practice in these areas elsewhere? Will you need to bring in expert guidance?
Communication	Will you have a dedicated web page about your diversity work and/or email address for people to contact? How will these be managed? What other ways are there in which you could communicate progress (i.e. magazine, flyers,

	social media, events)?
Budget	Will you need to ring-fence funding for: <ul style="list-style-type: none"> <li>○ Recruiting extra staff (if required)</li> <li>○ Buying in expertise</li> <li>○ Meetings</li> <li>○ Designing and disseminating materials</li> <li>○ Purchasing benchmark data</li> <li>○ How will the audit outcomes affect your resource planning?</li> </ul>

<b>4) Undertaking an audit/self-audit</b>	
Timing	When is the best time to take this forward in your organization? Does it fit in with a particular planning cycle?
Responsibility	Who will decide whether to commission an external consultant or take forward work internally? Have you the expertise to take forward an internal audit? Have you already decided on a budget for this work? Who will be responsible for overseeing the audit process? Who will be on your self-audit team (SAT)? How will you select those people? How will you ensure that all staff/member voices are heard? Who will the SAT report to? What are the desired outcomes?
Scope	Who will decide on the scope of the audit? Which areas will you include (membership, external projects, internal projects, all departments, etc.)? Will you exclude any particular areas (e.g. IT, finance, estates, etc.)? Will it focus on one diversity strand in particular or all strands at once? Are there any strands that you wish to prioritise? Have you considered what might be the easiest way to start? – e.g. only focus on recruitment for this audit & expand later on
Audit	If undertaking a self-audit, how will you decide which audit tool to use? How will you gather information – questionnaire, focus groups, interviews, combination of two or more? Do you need external expertise to advise on certain areas, even if undertaking self-audit?
Audit report	Who will read the audit report? Who will the recommendations be addressed to? Who will be responsible for taking forward the recommendations and overseeing their implementation?

<b>5) Establishing a Baseline</b>	
Taking Stock	What resources do you already have available to you? What (if any) actions have already been undertaken? Were these successful/unsuccessful? Why?
Understanding the picture	Following your audit/self-audit (stage 4): <ul style="list-style-type: none"> <li>○ How diverse is your organisation? How does it measure up?</li> <li>○ What areas need addressing the most?</li> <li>○ Did the audit identify any gaps in the data &amp; can you establish methods of measuring these?</li> </ul> What, given your resources and current state-of-affairs, are realistic and achievable aims?
Planning for the future	What are your current capabilities for establishing a baseline (i.e. what data do you collect)? What information might you aim to collect in the future? If developing a new database or collection method, will this be compatible with extended data/information? Could you implement it at this stage?
Engagement	How aware are your colleagues of the need to improve diversity? What is their level of buy-in/interest of colleagues? How much time are they able to give to you?

<b>6) Developing a plan</b>	
Deciding what works for you	What have you learned from your audit? What do you want achieve? Have you decided which aspects to tackle first? How are you going to do it?  What is easily achievable, what 'quick wins' can you identify? Are you going to work on these first? Where are your biggest gaps? What requires a larger project? Is it feasible to address this now or should it be a later development phase?

	<p>How will you manage a programme across the internal (your organization as an employer) and the external (your organization as a membership body) aspects?</p> <p>What resources (internal and volunteers) do you have and what may be available as shared resource?</p> <p>How can you best align resources to what you want to achieve?</p> <p>What will you start with/what order will you do things?</p> <p>Who owns the work stream(s)? What internal communications, meetings, reporting do you need and how often?</p>
Setting priorities and objectives	<p>What is a realistic target for you?</p> <p>Is your objective SMART? How will you know when you've achieved it?</p> <p>What are the development milestones?</p> <p>What will your timescales be?</p> <p>How are you going to record your progress?</p>

### 7) Communicating Priorities

Communication Channels	<p>What methods are most effective or appropriate?</p> <p>Can the plan be featured on your website?</p> <p>Social media? (Twitter, Facebook etc.)</p> <p>Publications, leaflets and posters?</p> <p>How will you communicate internally? (i.e. with staff members)</p> <p>How will you communicate externally? (i.e. with members of the society)</p> <p>Can you submit any resources to the roadmap? Or highlight priorities with the Science Council for communication?</p>
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### 8) Working towards your goals

During this stage plans will be put in to action so there are no questions to support this stage.
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### 9) Evidencing Success

Identify Sources	How will you identify the key sources from which you will draw evidence from? E.g. HR, recruitment, talent management
Data	<p>Where might you source data that will enable you to demonstrate and track progress over time? E.g. Employment data, survey data</p> <p>Refer back to baseline data &amp; any improvements – be aware of whether results have statistical significance or whether you can refer to trends.</p> <p>Have you used both quantitative and qualitative data?</p>
Case Studies	Where can you draw the case studies and examples from that show case what is already working within the sector? E.g. identify pockets of best practice
Mainstreaming	Who are the main stakeholders you will share the evidence with and how will you communicate it to them? E.g. Explore options to mainstream stories into established communication channels

### 10) Celebrating and Communicating Success

	<p>What worked best? How can this be highlighted?</p> <p>How can you engage all staff in this success?</p> <p>How can you showcase success to your membership?</p> <p>What appropriate methods are there for celebration? Press release, posters, Twitter etc.?</p> <p>Would others find this work useful?</p> <p>Can you submit a case study illustrating success or learning?</p> <p>Can you volunteer to offer advice and experience to another Declaration signatory?</p>
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### 11) Evaluating, reprioritising & redeveloping

Qualitative Evaluation	<p>Have perceptions of the organisation changed?</p> <p>Were people engaged with the activities – through attendance, correspondence, volunteering etc.?</p> <p>How were the different stakeholders involved?</p> <p>What was the feedback from members/staff/registrants/etc.?</p> <p>Weaknesses – can you determine what didn't work and why?</p> <p>Refer to your recommendations/objectives – did you achieve them?</p>
Quantitative Evaluation	<p>Have membership/ registrant/ other numbers increased? Is this by a significant amount?</p> <p>Has the demographic of membership/ those participating in events/etc. changed?</p>

	Resources used – what was the staff or volunteer time? How much did it cost?
Reprioritising	<p>What other areas to improve were identified in the self-audit?</p> <p>Review priorities – are you going to look at this issue in more detail or start action on something new?</p> <p>Do you need to perform another self-audit?</p> <p>Have your organisation's aims or goals changed?</p> <p>Have the available resources changed? How will this influence priority action?</p>
Redeveloping	<p>Check the roadmap - are there new case studies or research you can draw from? Is there anything you can add from your experiences?</p> <p>Establish predicted demand – can you reduce resource demand using your experience from the previous activity? Will this be led by staff internally, by governance or by member volunteers?</p> <p>Will the previous activity continue running? How will this link in with future work? Can it be integrated into routine organisational practice?</p>

For further support visit:

<http://www.sciencecouncil.org/content/diversity-equality-and-inclusion>