

Equity and Inclusivity in Research Funding Forum: Research Funder and University Joint Statement

June 2024

A shared action plan for a more equitable, diverse and inclusive research funding ecosystem

We, the members of this Forum, acknowledge the well-documented [systemic barriers and challenges](#) that individuals in marginalised groups face to secure research funding. We agree that bringing a wider range of people into the research community supports the robustness of research.

We also recognise that effective change can be accelerated through collective sector-wide coordinated action that will complement what individual organisations are already doing.

Principles: Our focus

The focus of the Forum is on equity and inclusivity in *research funding* specifically, and by signing up to this statement we agree to work together according to the following principles. These principles will also guide us in selecting what we will do as a Forum.

1. **Collective Action:** As a collective, we will tackle issues at the interface of research organisations and funders, focusing on those that have the potential to effect sector-wide change. Funders and Higher Education institutions (or equivalent) shall co-own the delivery process and its outputs.
2. **Collective Benefit:** We will ensure that every type of organisation is able to contribute to, and benefit from, the Forum equitably, regardless of differences in institutional context and capacity.
3. **Collective Knowledge:** We will share the outputs of our collective efforts for the benefit of the wider sector.

Priority areas: Our activities

We agree to work together on priority activities, comprising both defined projects and longer-term programmes. The following areas of focus have been selected based on: i) their alignment with the principles above and ii) the consensus of the participants at a sector-wide gathering in February 2024 and the wider stakeholder consultation surrounding it.

1. **Map of Support:** Map the available support for individuals in marginalised groups provided by UK funders, to highlight different approaches across the sector and bring these to the attention of applicants, Higher Education institutions, and funders.
2. **Positive Action:** Develop sector guidance on mechanisms for introducing positive action, i.e. putting into practice the existing legal provision for increasing representation of minoritised groups to overcome disadvantage and under-representation.
3. **Data-Gathering:** Consolidate data-gathering specifications and protocols to secure a more consistent data-sharing framework across the sector.
4. **Demand Management:** Develop guidelines on implementing an effective standardised approach to demand management of funding calls to ensure that EDI is considered in the design and execution of the calls.
5. **Intervention Points:** Map the funding process, to identify the intersection points of funders and Higher Education institutions that could benefit from coordinated action to support marginalised groups in a way that avoids duplication of effort and administrative burdens on both sides.
6. **Short-Term Funding Calls:** Identify mechanisms for both funders and universities to mitigate the negative effect of quick turnaround and short-term funding calls, such as more use of pre-announcements, and wider information-sharing on upcoming calls.

Project teams will be convened to develop an action plan for each priority area, consulting with individuals in marginalised groups as appropriate. We anticipate that the Forum will initially exist for three years, and that this list may evolve with direction from Forum members.

For further information about how we intend to realise this vision, and how individuals or organisations can express support for this statement and sign-up to join the *Equity and Inclusivity in Research Funding* Forum, please refer to the Terms of Reference supplement.

Equity and Inclusivity in Research Funding Forum: Terms of Reference

A supplement to accompany the Research Funder and University Joint Statement

This document provides further information about what it means to be a part of the *Equity and Inclusivity in Research Funding* Forum. It incorporates the views of participants at a sector-wide gathering in February 2024, and it may evolve further based on members' input.

1. What is the aim of the Forum?

- 1.1. The Forum is a group of professionals or organisations who have committed to work together on priority areas and projects, with the aim to accelerate the pace at which equity and inclusivity in research funding can be achieved in Higher Education.

2. Who can become a member of the Forum?

- 2.1. Any individual with expertise and willingness to contribute as described below (section 3) is welcome to join the Forum.
- 2.2. Any research funding organisation, Higher Education and research institution, and other organisation willing to contribute to improvement in equity in research funding.

3. What does it mean to sign up to the joint statement?

- 3.1. Signatory individuals or organisations become 'Members' of the *Equity and Inclusivity in Research Funding* Forum. By signing this statement, Members agree that they:
 - 3.1.1. support the principles and approach;
 - 3.1.2. will send a representative to Forum meetings; and
 - 3.1.3. will champion or promote their involvement in some way, with the aim to amplify and share the jointly developed outcomes of the Forum.
- 3.2. Signatory members participate in various ways e.g. i) volunteering for a rotating chair role, ii) leading a priority area project, iii) contributing to the projects, iv) sharing insights at, or helping to organise Forum meetings, and/or v) contributing financial or non-financial resources.
- 3.3. Signatory members will have the opportunity to be credited for their involvement in activities, or to have their logo posted alongside the public statement on the host organisation's website.

4. How will the priority areas be advanced?

- 4.1. Each priority area will have a project lead/co-lead and a 'core team', comprised of members.
- 4.2. The project lead/co-lead will lead the project or project team to agree deliverables, and share progress and outcomes at meetings of the Forum. The lead could be an organisation or a professional that is already pursuing a similar initiative.
- 4.3. Project leads will share any learnings, insights, or tools they develop with the wider sector.

5. How will we track progress?

- 5.1. Forum members will meet three times per year (including virtually) to share progress, gather feedback, exchange practice, and to agree on how outcomes and learnings should be shared.

6. How will we coordinate our activities?

- 6.1. We will have an annual rotating chair who will convene meetings of the Forum, supported by a working group. Members will collectively agree on the chair, project lead, Forum hosts etc.

7. How can new members join, get involved and find out more about the Priority Area projects?

- 7.1. We will set up a mailing list and online space for the members of the Forum to communicate with each other and share action plans.
- 7.2. We welcome contact from UK and international universities and funders who may want to be involved and apply the principles and learnings from this initiative within their local context.
- 7.3. Individuals or organisations interested to sign-up can contact the current lead at (Thandiwe.haramsulira@admin.ox.ac.uk) and later, the rotating chair as appropriate.

8. How does this Forum complement or engage with other EDI organisations?

- 8.1. The Forum has been co-created through extensive engagement of several organisations during the development of the [Oxford Report on Equity and Inclusivity in Research Funding](#), and the subsequent stakeholder engagement process. These activities identified a gap in sector-wide action specific to inclusivity in research funding. We expect to continue to seek input from these organisations to the activities of this Forum and we welcome their involvement.