**EPSRC Mentoring Project – Taxonomy**

Please note this is an abridged overview and should not be seen as comprehensive.

Definitions of key terms used in the EPSRC Inclusion Matters bid:

* **Shared characteristics mentoring** – this is where early career staff from underrepresented groups are mentored by more senior staff who have similar identities or personal attributes, traits, qualities, and experiences that are perceived to be similar’.
* **‘Shared interests’** is defined as: Academic experiences (e.g. career trajectories, writing grant proposals, promotion applications, learning about research funding pathways etc. ) that are perceived to be similar’, and similar personal interests.
* **Reverse mentoring** – this is where early career staff from under-represented groups mentor more senior staff about specific challenges they face.
* **Early careers** – this is defined as post-doctorate, lecturers and researchers.
* **Senior staff** – this is defined as ‘having appropriate experience and having attained an appropriately senior position. For guidance, within HE this might include staff at professorial, associate professor, reader, senior lecturer, principal research or teaching fellow role or equivalent although other role holders might be agreed following discussion.’ The main qualification (other than an enthusiasm for acting as a mentor and a willingness to undertake training and to commit time to the mentor meetings) is that someone should have achieved a certain level of seniority/accomplishment and experience.
* **Leaky pipeline** – this is the loss of individuals from under-represented groups at all stages of their career transition, especially early career stages.

Key abbreviations used in the EPSRC Inclusion Matters bid:

* **BAME** – Black and Asian Minority Ethnic
* **EDI** – Equality, Diversity and Inclusion
* **EPS** – Engineering and Physical Sciences
* **EPSRC** - Engineering and Physical Sciences Research Council
* **HEI** – Higher Education Institution
* **LGBT+** - Lesbian, Gay, Bisexual, Trans, plus other sexual orientation groups
* **UKRI** – UK Research and Innovation

Although the shared characteristics and reverse mentoring project/s relates to the protected characteristics in the Equality Act 2010 they are not exclusive to these characteristics, or use them as a catch all, eg;

* **First into academia** – this relates to people from low income backgrounds that are first in their family to enter higher education (which could relate to any, or none, of the protected characteristics).
* **With or without children** – this could relate to any of the protected characteristics, and could be a form of intersectionality that becomes relevant.

As we progress through the project there are likely to be others as yet unidentified.

* **Intersectionality** – this is the interconnected nature of social categorizations such as race, class, and gender as they apply to a given individual or group, regarded as creating overlapping and interdependent systems of discrimination or disadvantage.

**Briefly, the legal aspects first:**

The Equality Act 2010 protects people from discrimination on the basis of any of the protected characteristics; age, disability, sex, sexual orientation, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, and religion and belief.

The Act also requires public bodies (such as educational institutions) to consider how their decisions and policies affect people with different protected characteristics. A public body also should have evidence to show how it has done this.

**1) Equality Act 2010**

The Equality Act consolidated an array of previous legislation, and established the nine protected characteristics;

1. Age - A person belonging to a particular age (for example 32 year olds) or range of ages (for example 18 to 30 year olds).
2. Disability - A person has a disability if she or he has a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities.
3. Sex - Sex refers to the male/female physical development – the phenotype. In an infant, the sex is judged entirely on the genital appearance at birth.
4. Sexual orientation - Whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.
5. Gender reassignment - The process of transitioning from one gender to another.
6. Marriage and civil partnership - Marriage is a union between a man and a woman, or between a same-sex couple as covered under The Marriage (Same Sex Couples) Act 2013. Same-sex couples can also have their relationships legally recognised as 'civil partnerships'.
7. Pregnancy and maternity - Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth, and is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating a woman unfavourably because she is breastfeeding.
8. Race - Refers to a group of people defined by their race, colour, and nationality (including citizenship) ethnic or national origins.
9. Religion and belief - Religion refers to any religion, including a lack of religion. Belief refers to any religious or philosophical belief and includes a lack of belief. Generally, a belief should affect your life choices or the way you live for it to be included in the definition.

**2) Gender Recognition Act 2004**

This provides a mechanism for someone to be legally recognised in, and gain the rights and responsibilities of, their gender affirmed through gender reassignment i.e. from man-to-woman, or woman-to-man. For example, the right to a new birth certificate if the birth was registered in the UK.

There are strict privacy requirements under the Act regarding gender recognition, which reinforce those in the Data Protection Act 1998, under which 'transsexual' identity and gender reassignment constitute ’sensitive data’ (Office for National Statistics 2009).

**3) Data Protection Act 1998, update as The Data Protection Act 2018**.

The Act incorporates the EU General Data Protection Regulation ‘GDPR’ into law.For the purposes of the Data Protection Act, gender reassignment and any information appertaining to an individual’s gender history would now constitute ‘sensitive data’ which can only be processed for certain specified reasons, as set out in the Act.

**4) Human Rights Act 1998**

Article 8 of the Human Rights Act gives everyone the right to a private life, ie, privacy and family life.

It is the antithesis of the intentions of the privacy provision included in the Gender Recognition Act 2004 to ask or expect an individual to evidence that they have a gender recognition certificate. Eg, it is best practice to assume any 'transsexual' person has a gender recognition certificate and treat them accordingly. This also prevents a gender recognition certificate from becoming an inappropriate demarcation as the provisions of the Equality Act 2010 apply to all 'transsexual' people irrespective of whether they have a gender recognition certificate (see key definition around ‘transsexual’ usage as a term).

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| **Key Terms** | **Key Definitions** |
| Age | A person belonging to a particular age (for example 32 year olds) or range of ages (for example 18 to 30 year olds). Age discrimination at work - treating someone unfairly because of age - is against the law apart from in very limited circumstances. This is the law under the Equality Act 2010 which replaced the Employment Equality (Age) Regulations 2006.  Age discrimination is not always about an ‘old person’ being preferred over a ‘young person’ because of their age – or vice versa. The age difference might be small – for example, a few years between one person in their late forties compared to another in their early fifties. Or, for example, a 21-year-old might claim discrimination because they are being treated differently because of their age compared to their colleague who is in their forties. |
| Disability | A person has a disability if she or he has a physical or mental impairment which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities. There are exceptions to the main definition of disability, where a person is treated as disabled and entitled to protection without having to show their condition has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities in the following situations:   * Where someone has cancer, HIV infection or multiple sclerosis. The Act specifically says a person who has one of these conditions is a disabled person from the point of diagnosis. * Where a consultant ophthalmologist has certified someone as blind, severely sight-impaired, sight-impaired or partially sighted. The Act regards them as disabled.   Often you may hear people talk of ‘disabled people’. This is a phrase many now think is derogatory and should be avoided. People are not disabled, they have a disability. Therefore, if someone is in a situation where their disability is not relevant there is no need for it to be mentioned. First and foremost they are a person with a name. |
| Sex | *Sex* refers to the male/female physical development – the phenotype. In an infant, the sex is judged entirely on the genital appearance at birth, but internal reproductive organs, skeletal characteristics and musculature, and the brain, are all sex differentiated. Other factors such as karyotype (chromosomal configuration) are seldom tested unless a genital anomaly is present. There is a presumption that an apparently male infant will identify as a boy, and vice versa. |
| Sexual  orientation | Sexual orientation is associated with the sexual attraction between one person and another. Sexual orientation is a separate issue from  gender identity; Trans people may be gay, straight, bisexual, asexual or any other sexual orientation. Their sexual relationships may remain the same through the transition process or, sometimes, they shift (GIRES, 2015). |
| Gender | A person’s sense of self as a man, woman, non-binary person or other sense of gender. A person’s gender identity can follow directly from the sex they were assigned at birth, but this is not always the case (GEO, 2015). There is a view that metrics used to determine one’s *biological sex* are flawed as a way of ‘pinpointing’ *gender*. As such, the two can be at odds with one another, therefore gender needs to be self-reported. |
| Gender  reassignment | Gender reassignment is the term used to describe transitioning from one binary gender to another (EHRC, 2011). The Equality Act 2010 defines the protected characteristic of gender reassignment as where a person has proposed, started or completed a process to change his or her sex. |
| Transgender / transsexual | Transgender has sometimes historically been used as a substitute for the term ‘transsexual’ due to the controversy felt to be associated with this term by many members of the trans community. Others use the term ‘transgender’ as a broader umbrella term (although most would suggest using the term Trans – see below). Due to the several different ways that the word transgender is used by different people and organisations, confusion can arise.  In law, a reference to a transsexual person is a reference to someone who has the protected characteristic of gender reassignment. However, the term ‘transsexual’ is now considered old fashioned, and for many should not be used to refer to an individual (GIRES, 2015). |
| Trans men /  trans women | Trans men are those who were assigned female at birth but who identify as men. Those assigned male at birth but identifying as women may be referred to as ‘trans women’ (GIRES, 2015). Many trans people, having transitioned permanently, prefer to be regarded as simply men and women. |
| Trans | This is an umbrella term to describe people whose gender is not the same as, or does not sit comfortably with, the sex they were assigned at birth. Trans people may describe themselves using one or more of a wide variety of terms, including (but not limited to) transgender, cross dresser, non-binary, genderqueer (GQ).  There can be confusion. A trans person is not a cross dresser or drag queen or king. Anyone may wear clothes associated with a different sex, although the term ‘cross-dresser’is typically used to refer to men who occasionally wear clothes, makeup, and accessories culturally associated with women. This activity is a form of gender expression and is not done for entertainment purposes. The term ‘drag’ is applied to individuals who cross-dress often for entertainment purposes. ‘Cross-dresser’ replaces the term ‘transvestite’, which is now generally viewed to be inappropriate and can cause offence. |
| Intersex  variations,  intersex | Intersex is a naturally occurring variation of human development (a:gender, 2016). There are a number of intersex variations. Some medical personnel use the term ‘hermaphrodite’ to refer to people with certain intersex variations. However, this is generally viewed as outdated and incorrect. It is recommended that this term be abandoned as it fails to reflect modern scientific understandings of intersex variations, being both misleading and stigmatising. |
| Non-binary,  Gender neutral,  Non-gender,  Third gender,  Gender queer  (GQ), Gender  Non-conforming  (GNC), Gender  fluid | These terms are used to define a person who does not subscribe to the binary approach to gender, and who may regard themselves as neither man nor woman, or man and woman, or take another approach to gender entirely (GEO, 2015).  Gender neutral pronouns may be preferred by people who identify as non-binary or otherwise gender nonconforming. If in doubt, it is best to ask the individual what they prefer and how they define their gender. People can self-identify, and many people reject the whole idea  of tick-boxes, and describe themselves in non-binary terms. |
| Bi-gender | Bi-gender people have a gender identity that encompasses masculine and feminine (Stonewall, 2004). |
| Androgynous | A person who does not fit clearly into the typical gender roles of their society. Androgynous people may identify as between genders, moving across genders, entirely genderless, or any or all of these (Office for National Statistics, 2009). |
| LGBT, LGBTIQ,  LGBTQU  LGBTQIA,  LQBTQ+,  LGBTTQQIAAP,  QUILTBAG | Acronyms, variations of which stand for lesbian, gay, bisexual, trans (or  transgender), queer, questioning, unsure, intersex, ally, asexual and pansexual communities (Stonewall.org, 2016). Some organisations have criticised acronyms for aggregating sexual orientations and gender identity under one umbrella term. The term ‘queer’ may be deemed offensive by some, yet others may self-identify this way. |
| Marriage and Civil Partnership | Until the introduction of the Marriage (same-sex couples) Act 2013, the only marriage available was between a ‘man’ and a ‘woman’. Since the introduction of the 2013 Act, there are same-sex couples opting for this form of marriage, rather than a civil partnership. |
| Pregnancy and maternity | Pregnancy and Maternity as defined under the Equality Act 2010: Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth, and is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, and this includes treating a woman unfavourably because she is breastfeeding. |
| Race | In the Equality Act 2010, race can mean your colour, or your nationality (including your citizenship). It can also mean your ethnic or national origins, which may not be the same as your current nationality. |
| Ethnicity | Ethnicity is a multifaceted and changing phenomenon. There are various possible ways of defining ethnic groups; country of birth, nationality, language spoken at home, skin colour (an aspect for consideration for some and not for others), national/geographical origin and religion. What is generally accepted, is that ethnicity includes all these aspects, and others, in combination. **The recommended key ethnic groupings are:**  **White**  1. English/Welsh/Scottish/Northern Irish/British 2. Irish 3. Gypsy or Irish Traveller 4. Any other White background, please describe  **Mixed/Multiple ethnic groups**  5. White and Black Caribbean 6. White and Black African 7. White and Asian 8. Any other Mixed/Multiple ethnic background, please describe  **Asian/Asian British**  9. Indian 10. Pakistani 11. Bangladeshi 12. Chinese 13. Any other Asian background, please describe  **Black/ African/Caribbean/Black British**  14. African 15. Caribbean 16. Any other Black/African/Caribbean background, please describe  **Other ethnic group**  17. Arab 18. Any other ethnic group, describe |
| Religion and belief | The Equality Act 2010 says you must not be discriminated against because: ... someone thinks you are of a particular religion or hold a particular belief (this is known as discrimination by perception), or you are connected to someone who has a religion or belief (this is known as discrimination by association).  The Equality Act also covers non-belief or a lack of religion or belief, eg, the Act protects Christians if they are discriminated against because of their Christian beliefs, and it also protects people of other religions and those with no religion if they are discriminated against because of their beliefs. |
| Religious identity / religious affiliation | * For many people, religion is one of the most important defining characteristics of an identity, and can cover different concepts of religion including religious affiliation, practice, belief and belonging. **Religious affiliation** is the connection or identification with a religion irrespective of actual practice or belief.This is the recommended concept for the Government Statistical Service (GSS). * **Religious practice** includes specific religious activities expected of believers. **Religious belief** includes beliefs typically expected to be held by followers of a religion and how important those beliefs are to a person’s life. **Religious belonging** can be interpreted as both loose self-identification and active or formal belonging to a religious group. This can produce problems of ambiguity as some people may respond that they have a religious affiliation but not belong to a religion. **The recommended key religious groupings are:** * No religion * Christian (including Church of England, Catholic, Protestant and all other Christian denominations) * Buddhist * Hindu * Jewish * Muslim * Sikh * Any other religion, please describe |

This is an abridged version of various other documents:

* ACAS Gender Identity Terminology, Aug 2017.
* Equality Act 2010.
* GIRES, 2015, Terminology.
* Legislative Scrutiny: Equality Bill, <https://publications.parliament.uk/pa/jt200809/jtselect/jtrights/169/16906.htm>.
* Office of National Statistics, <https://www.ons.gov.uk/methodology/classificationsandstandards/measuringequality/ethnicgroupnationalidentityandreligion>.