EQUAL4EUROPE
GENDER EQUALITY PLANS

Programs and Materials for Retention and Development

D3.4

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EXECUTIVE SUMMARY

This deliverable offers an overview of retention and development toolkits, and additionally includes information on a specific training on the advantage of gender bias in communication. The report is intended for professionals working in the higher education sector, supporting them in the goal of retaining a diverse workforce, and in particular female academics, in their organization.

Reviewing 17 HR toolkits, this summary of best practices is divided into two parts:

1) **understanding retention risks**, and

2) **retention and development best practices**.

The first section focuses on suggested measures for understanding and identifying retention risks. A first suggestion is to monitor the workforce and zoom in on retention issues, such as by looking at who is leaving the organisation and who is promoted. A second suggestion is to gain an overview of past organisational efforts, focusing on retention and development issues and their effectiveness. A third suggestion is to do environmental scans in order to identify systemic barriers to retention, development, and promotion. A fourth suggestion is to conduct stay and exit interviews with diverse employees. While “stay interviews” allow identifying opportunities for improvement before the loss of a valued employee, “exit interview” can gain an understanding into what went wrong. Overall, these suggestions focus on effective data collection and analysis of retention and development issues in order to identify (potential) problems. Based on these insights a retention strategy can be developed.

The second section offers an overview of the suggested retention and development practices to ensure successful retention and development and minimize turnover intentions. These best practices are clustered into five areas: 1) socialization, 2) training and development practices (e.g., mentoring programmes, transparent career models, professionalisation of leadership development), 3) recognition and benefits (e.g., flexible working arrangements and financial benefits for employees with care responsibilities), 4) wider working climate (e.g., commitment and promotion of diversity and inclusion principals), and 5) specific policies supporting academics with childcare responsibilities. These suggestions can give an idea of what could be included in a retention strategy.

The final section of this deliverable introduces the training on the advantage of gender bias in communication, developed with an aim to address the topic amongst female faculty at the participating institutions in the EQUAL4EUROPE project. Participants will be inspired and challenged to increase their influence by considering the value of gender bias in communication and adapting their approach to take advantage of it.

A brief description of this specific training is shared and summarizes the learning outcomes. The training is an outcome of WP3, focusing on investigation of key environmental and skills needs for women to advance their careers in research organisations. Based on institution wide surveys from WP2, participants identified needs for further training and negotiation and communication was in the top listed needs for trainings. Its aim is also to provide an inspiration for other institutions interested in introducing similar training for their female faculty members.

INTRODUCTION

Nowadays, the majority of organizations face a greater risk of losing capable staff members (Rogers, 2020). Fiercer competition in the labour market increased the pressure for organisational to secure competent people and greater employment fluidity in the form of job changes heightens the risks of high-performing employees leaving the organisation or switching to another sector (Yamamoto, 2011). The urgency for managers to focus on retention and development has increased as the global pandemic started a unprecedent rate of employees resigning (Cook, 2021).

The process behind turnover, employees leaving their job, is complex. It relates to employees' job satisfaction and commitment to their work and organisation (Steel, 2002). If individuals are not satisfied or committed to their work, they start a withdrawal process. This process can start with the evaluation of the current work against other possible alternatives, and continue with the development of ideas for their future, and engagement in various types of job search behaviour. This process could lead to an actual resignation or other withdrawal behaviour, such as absenteeism, lateness, and poor performance at the workplace. All these outcomes are negatively impacting an organisation. Turnover thus matters because it is costly, it negatively affects the organisational performance, and it may become increasingly difficult to manage due to the shortage of highly skilled employees (Al-Emadi, Schwabenland, & Wei, 2015; Shaw et al., 2005). Organisations should thus proactively manage retention issues.

Higher education institutions ignoring retention issues may lose their highly marketable workers and have a lower organisational performance. There are multiple reasons why in particular female academics leave universities and resulting in a lower representation of female academics in more senior and leadership positions in higher education, including gender discrimination and stereotyping, undervaluation of women's work, gender-based labour market segmentation, traditions and culture, and work–life balance issues (UNCTAD, 2014). In the European context for example, female academics account for nearly half of grade C staff (46%) but they only occupy 24% of grade A staff positions (European Commission, 2019). Women are also underrepresented in leadership positions in strategic management committees of European universities. There is thus no point in hiring a more female academics if they do not stay in the higher education intuitions. To foster greater gender equality, universities can focus on the retention and development of their female talent.

The retention process starts during the hiring process. Ensuring candidates fit the organisational and team culture, that the work and task expectations are realistic, and that the job description of the position is clear are first steps to retaining newly hired employees. Retention policies for a diverse workforce involves similar ideas for attracting and recruiting a diverse workforce, for more details on how to foster equality in the hiring process please see also our HR recruitment and selection toolkit. This summary collected suggestions and ideas to retain valued female academics. This overview can be used as an inspiration or in parts to help managers focusing on high priority retention areas.

This summary of 17 retention and development toolkits is intended for professionals working in the higher education sector to support the goal to retain a diverse workforce and in particular female academics in their organization. Tackling diversity and inclusion topics requires a long-term commitment across your organisation and measurement beyond the recruitment cycle. There is no one-size-fits-all solution as each university is unique operating in its own environment and having its own challenges (Allen, Bryant, & Vardaman, 2010). Metrics of the diversity of the workforce can be helpful to keep organisations accountable to their commitment (Elliott, Haynes, & Jones, 2021). Where does your organization stand internally and externally with respect to diversity? Retention goals and challenges may differ across departments and groups within one university. Part one of this summary offers an overview how retention risks can be measured.

Retention management can be defined as the human resource management policies and initiatives taken by organizations to create an environment which encourages and motivates employees to remain with them for a maximum period of time, enabling individuals to exercise or develop their capabilities (ALDamoe et al., 2012; Mahal, 2012; Yamamoto, 2009: 14-15). While there are various reasons why employee leave an organisation, a retention strategy for employees revolves around employee satisfaction. Examples are to offer tailored learning and development opportunities (Hay, 2002). Leadership development has also a positive influence on highly skilled employees (D’Amato & Herzfeldt, 2008). An effective retention strategy however involves many aspects of the work environment and the employee relationship. Depending on the goal retention management involved various aspect of the organisation and interlinked with other practices, such as training and development, salary and benefits, and promotion policies. Part two of this summary gives an overview of various retention practices addressing employee satisfaction.

1. DEFINING A RETENTION STRATEGY

STEP 1: UNDERSTANDING RETENTIONS RISKS

To start with understanding the risks associated to retention, the Retention Toolkit of the University of Michigan suggests some questions to reflect on your retention policies and retention of a diverse workforce. The most relevant ones are for academic staff members is: "Do you have difficulty attracting and maintaining diversity among your academic staff members? If you, a retention plan may be useful.

Self-evaluation is important for several reasons:

- To identify the nature of the retention problems for faculty and professional services staff in the different departments.
- To select strategies and interventions to address challenges.
- To provide a baseline or point of comparison against which the results of an intervention can be compared.
- To assess workplace retention practices.
- To help identify what is and what is not working.

STEP 2: ASSESSING RETENTION AND TURNOVER IN YOUR INSTITUTION

To develop a retention plan, most toolkits recommend to **monitor** who is being employed, who is staying and leaving the organisation, who is (not) promoted, who has what kind of training and training budget and makes use of it, and what are the relative costs and benefits of the current turnover (e.g., APHNET Toolkit and SHRM retaining talent guide).

The AHP toolkit focusing on retention plan suggest to calculate retention and turnover is just the first step in determining employee stability. These rates do not tell the whole story. The following retention and turnover calculation formulas are simple and effective methods to determine who is leaving, when, and under what circumstances. The term "calculating period" can be months, a series of months, or years, depending on the trends you are researching. You can use any time period. We used months in these examples. The "employee" category can be a specific job position or type of job, a specific shift, or your employees in general. The following formulas can help you determine 1), retention rate, 2) turnover rate, 3) voluntary turnover rate.

Retention Rate

Calculating your retention rate (stayers)
The number of “stayers” (employees who remain at the end of calculation period) divided by the number of employees you had at the beginning of your calculation period times 100 equals your retention rate.

Example of Retention Rate Calculation

If you have 100 employees starting the first day of the month, and 90 employees at the end of the month, you have lost 10 of employees. Your retention rate is 90 percent.

Number of stayers	*Divided by*	Number of personnel at beginning of period	*Times 100*	*Equals*	Your retention rate
(90	**÷**	**100)**	X **100**	**=**	***90%***

Calculating your retention rate can be interesting, but misleading. Using the retention formula, it appears that you lost only 10 employees during the month. However, what happens if you hired 12 employees after the first day of the month and 8 left before the end of the month, in addition to the other 10 that left? You can gain a better understanding by simultaneously measuring your turnover rate.

Turnover Rate

Calculating your turnover rate (leavers)
The number of “leavers” (employees terminating during your calculation period) divided by the total number of people employed during your calculation period times 100 equals your turnover rate.

Example of Turnover Rate Calculation

You had 175 people in your employment in January. Fifty employees left by the end of the month. A simple turnover rate is 50 divided by 175, which equals 28.6 percent.

Number of leavers	*Divided by*	Number of people employed	*Times 100*	*Equals*	Your turnover rate
(50	**÷**	**175)**	X **100**	**=**	***28.6%***

Voluntary Turnover Rate

The previous calculation shows the entire turnover rate, but not all turnover is voluntary. Voluntary turnover is when the employee chooses to leave. The reasons for voluntary turnover vary, and it can be caused by a number of factors. These may include lack of job training or advancement opportunities, little feedback, job dissatisfaction or unmet job expectations, stress, or compensation factors. To pinpoint problem areas or make changes, you need to determine the rate of those who left voluntarily for another job. Take the same example and look at who left voluntarily.

Calculating your voluntary turnover rate
The number of employees who left voluntary divided by the number of employees you had during your calculation period times 100 equals the voluntary turnover rate.

Example of Voluntary Turnover Rate Calculation

Fifty total employees left, but only 12 were dissatisfied with the organizational policy, compensation, and/or career opportunities. Good exit interview strategies should help you determine which employees terminated voluntarily.

Of the other 38, 15 retired, 7 moved to another part of the State, 8 were laid off due to funding cuts, 3 were terminated for poor performance, and 5 became ill and could no longer work. These numbers indicate involuntary turnover.

Number of voluntary leavers	*Divided by*	Number of people employed	*Times 100*	*Equals*	Your voluntary turnover rate
(12	÷	**175)**	X **100**	=	***6.9%***

Calculating such retention and turnover rates can give insights to employee stability, who is leaving, and when they leave.

If aiming to retain and promote female talent regular monitoring should include measuring the advancement of female academics as compared to male colleagues e.g., the representation of previously under-represented groups among your board members, head of departments, head of research groups, and other managerial positions. For example, are female academics more or less likely to receive trainings or get promoted? Are they more likely to leave during their tenure track position or after? Do pay gaps among exist between female and male academics at the same level, and generally across your organisation? Once the baseline data is collected and analysed, areas of improvement and critical issues can be identified.

SHRM retaining talent guide suggest to conduct **stay and exit interviews** with diverse employees. “Stay interviews” are a preventive approach proactively identifying opportunities for improvement before the loss of a valued employee. “Exit interview” data allow insights to what went wrong but can also show trends related to the work environment. More information how to conduct a stay or exit interview can be found in the SHRM retaining talent guide or Retention Toolkit of the University of Michigan.

Background information on the **organization’s past efforts in retention and development** can help identify what retention methods were used, which were effective or ineffective over the years, and why. If a university or department aims to increase the share of female academics collected data can thus be related to the past retention and development policies and identify how effective previous policies have addressed existing retention and development issues.

A more inclusive and equal organisation requires a long-term commitment. Canadas Research Chair suggest to foster the retention by also conducting **environmental scans** to identify systemic barriers. To scan the organisational environment faculty, staff, and students of every background and ability should be surveyed about the institution's collegiality and climate and how well it is doing in its EDI work. Use the findings to identify systemic barriers and address them can foster greater retention.

STEP 3: DEFINING A RETENTION STRATEGY

Effective data collection and analysis of retention and development issues will identify (prospective) problems. To measure the effectiveness of the retention and development practices, regular monitor should be ensured. Based on the insights of regularly collected data the SHRM Retaining Talent Guide and the Retention Toolkit of the University of Michigan recommends to **define a retention strategy**. They suggest the following questions to develop a retention strategy:

Some questions to consider when deciding which retention strategy to follow:

- How big is your problem?
- Is it a problem of the whole organization, of a certain department or team?
- Do you need an immediate fix, or can you plan a longer intervention for a greater future outcome?
- Do you have to be concerned with running out of resources for long-term interventions? Can you complete the intervention in stages?
- Do you need to start with short-term objectives to show results and provide quick relief?
- What intervention could produce the biggest impact for your problem?
- What intervention would be the most realistic in terms of resources and successful task completion?
- Do you have key staff members or consultants available to complete the necessary steps in the intervention, such as those who will be involved in developing, implementing, and evaluating the intervention?
- Does your organisation already focus on an inclusive work environment and retaining diverse staff members?
- In your organization, do leaders receive coaching in diversity and inclusion as well as provide coaching to others?
- Does your organization have and exercise a talent retention strategy? If so, does it specifically address diverse talent retention?

2. BEST PRACTICES AND RECOMMENDATIONS FOR RETENTION AND DEVELOPMENT POLICIES

This section provides ideas for retention and development policies and practices which could be included in a retention strategy plan. Some of the practices are more general and others are aiming to increase the retention of diverse faculty members. The sections below summarize the practices from these toolkits focusing on suggestions related to 1) socialization, 2) training and development practices, 3) recognition and benefits, 4) wider working climate and culture, and 5) policies supporting academics with childcare responsibilities.

2.1 SOCIALISATIONS AND MENTORING

Typically, organisations experience higher turnover rates among new employees. Socialization practices can help new hires become embedded in the company and thus more likely to stay (Allen, 2006). These practices include shared and individualized learning experiences, formal and informal activities that help people get to know one another, and the assignment of more seasoned employees as r

For example, AICPA's Recruitment and retention toolkit suggest mentoring programmes for onboarding. Assign a mentor to all new members. Mentors and buddies can help new employees to gain a better understanding of working cultures and concerns outside of a line manager relationship. Mentoring programs are especially effective in creating connections and networks between talented diverse members and maintaining transparent communication channels across various levels of the organization. Such relationships can be invaluable in increasing retention and progression rates and provide a mechanism for support where difficulties arise.

Additionally, SHRM's guide to retaining employees recommends organisations to provide clear information about the stages of the socialization process to newly hired employees and plan orientation activities so that groups of new hires experience them together.

2.2 TRAINING AND DEVELOPMENT SUGGESTIONS

Training and development practices are opportunities for employees to advance their knowledge and skill sets. Organisations aim with training and development practices to instil greater motivation and to enhance job performance of an individual or group. Such programmes have a modest negative effect on turnover rate. Employees having more trainings are somewhat less likely to leave their job compared to those who receive fewer trainings (Allen, Shore, & Griffeth, 2003). These ideas mainly focus on being transparent, supporting diverse employees, and professionalising leadership and leadership trainings.

Training opportunities. The Inclusive retention toolkit by the University of Texas suggests to invest in high quality and relevant job-related training and ongoing development opportunities that are tailored to the various stages and positions that faculty, graduate students, postdoctoral fellows, and professional services move through within the institution. These should be designed with your employees in mind knowing the strengths and ambitions of your employees. Reflect which are the appropriate forms of trainings and development opportunities. Offering employees appropriate training and development opportunities will benefit both your organization and the individual employee.

SHRM's guide to retaining employees also mentions that managers could coach and support employees through frequent, regular, and meaningful conversations and performance feedback. Managers should continually communicate clearly expectations and top priorities. Frequent and lightweight feedback can encourage employees to make small, manageable changes and improvements. Employees who feel appreciated by their managers are more likely to sat with the company. Successfully coaching employees, both managers and employees build a relationship in which they feel comfortable providing authentic feedback without fear of discrimination, retaliation, or harassment.

Employees directing their own growth and set goals. The Retention Toolkit of the University of Michigan Create accountability also highlights to involve employees in goal-setting and empower them to direct their own growth. Talent assessments and individual performance data can provide employees information to identify their strengths. HR professionals can assist this process by matching employees' personal strengths and career goals with organisational opportunities. Offering employees clear prospects within the company can improve retention.

Mentoring and sponsorship programmes. AICPA's Recruitment and retention toolkit suggests to develop a strong mentoring culture within the university providing formal and informal mentoring to develop and foster an inclusive community and career and psychosocial support.

- On-going departmental support for all mentors and mentees
- Luncheons that build community and promote collegiality
- Speaker programs that provide best practices in effective mentoring
- Encourage faculty and staff members, as well as graduate students and postdoctoral researchers to seek out multiple informal mentors
- Encourage peer mentoring networks and collaborations both within the department and across the university

- Recognize outstanding best practices and exemplary mentoring relationships by providing modest stipends or creating an annual award (similar to a teaching award with a monetary prize) for mentorship
- Encourage eligible faculty to apply for the Graduate School's Diversity Mentoring Fellowships for Graduate Students, which help faculty recruit, mentor, and support outstanding new graduate students who will add to the diversity of the university's graduate programs
- Recruit and mentor postdoctoral fellows with the potential for the positions to become full-time faculty lines at the end of the fellowship
- Sponsorship programs can be effective in developing and enhancing diverse professionals' careers.

Communicate a transparent model of career development and training opportunities. AICPA's Recruitment and retention toolkit and University of Texas' Inclusive retention toolkit both recommend to clearly communicate, and having transparent and accessible policies and procedures for evaluation, promotion, and tenure and training opportunities. Examine and implement best practices that address psychosocial and organizational barriers, myths, assumptions, cognitive errors and biases that affect retention, salary, workload equity, trainings, promotion, and tenure. For example, evaluate candidate's teaching reviews in context. For example, student evaluations are subjective and often are influenced by unconscious or other biases. Gender, disability, race, language ability (i.e., working in a second or third language) and culture could affect teaching style or the students' perceptions of the instructor.

Professionalise leadership. Provide opportunities and training for deans, chairs, senior faculty members, and unit leaders on outreach, recruitment, hiring, retention, and promotion of women and underrepresented faculty, graduate students, and postdoctoral fellows. Identifying and communicating defined leadership competencies and providing development in those areas is seen as important by AICPA's Recruitment and retention toolkit. Managers and other senior personnel should know what you are looking for in a leader. Hold information sessions about promotion, including on how panels assess promotions, and how best to prepare your application package for the promotion process.

Engage professionals from marginalised groups in leadership development. Include professionals from under-represented groups in leadership development and training as a component of succession planning.

Other options are:

1) Establish leadership training and development initiatives that focus specifically on minority candidates.
2) Nominate and send women and underrepresented members (graduate students, postdoctoral fellows, and faculty members and professional services to national conferences and leadership programs.

Avoid "tokenism". A Best Practices Guide by Canada Research Chairs recommends to seek a balance in having an underrepresented faculty member on every committee. This might lead to an unfair burden of service and affect their success in the department if there are a small number of underrepresented faculty in the department. Do encourage all employees to become involved in committees or in decision-making groups based on their interests and strengths. Additionally, minority employees do not speak for or represents the entire minority group.

Getting on. University of Texas' Inclusive retention toolkit highlights that implicit biases can also affect perceptions of an individual's performance and determine who gets promoted or received what kind of training. For examples, implement actual, measurable on-the-job performance measurements and ensuring transparency of training, development, and performance processes to minimise implicit biases in the development and performance evaluation.

2.3 RECOGNITION AND OFFERING EMPLOYEE BENEFITS

Recognising employee's contribution is important and has an impact on employees' satisfaction. Organisations can call attention to great achievements and high performing by diverse employees or employees who demonstrated key values. Offering employee benefits is one of the most commonly used employee retention best practices because it appeals to employees' desire for security and stability. Pay levels and pay satisfaction seem to be only modest predictors for turnover decisions (Griffeth, Hom, & Gaertner, 2000). Failing to offer competitive rewards, organisations may be at a disadvantage for retaining talent. Organisations can compare their benefits and compensations with the ones of their competitors. Utilize a variety of resources to retain faculty, including salary adjustments, competitive career development funds, fellowships, endowed appointments, reduced loads, leaves and fellowship leaves, bridge money, research support, mentors, leadership and professional development opportunities, collaborations with other departments on campus, release time from teaching and service, etc. Universities should consider how to use rewards to retain their academic staff members. Other benefits include financial or childcare assistance and flexible work arrangements.

Financial and childcare assistance is usually provided by governments (city, commune, etc.). However, organisations can provide extra opportunities for childcare assistance to their employees. BalticGender summarises best practice examples:

- On-site childcare.
- Additional childcare places for people who have difficulty to find a place in a short and timely manner e.g., persons from abroad or single parents.
- Covering the costs for childcare or organized childcare during conferences, seminars, trainings, or other meetings (on demand).
- Holiday programs for school children.
- Funding for childcare during business travel.
- A compensation for study disadvantages caused by the incompatibility of family issues with their studies (for students).

Flexible working arrangements allow most individuals to combine their care responsibilities (childcare, eldercare) with their work ones. Academics have generally more flexible working time and hours, whereas other professional service staff members may have some restrictions depending on the nature of their work. Below you can find some suggestions from the BalticGender project to allow for flexible work arrangements:

- Flexible working time/hours.
- Home office and/or telecommuting.
- Part-time employment.
- Work agreements for sabbatical.
- Adaption of meeting and teaching times to family-friendly hours.
- A substitute for laboratory work for pregnant or breast-feeding researchers.
- School holidays and partner’s annual leave are taking into account when planning employees’ annual leave.

2.4 WORKING CULTURE

University of Texas' Inclusive retention toolkit suggest for the retention strategy of universities and department to commit to fostering an inclusive working climate and culture where all identities are respected.

- A start is to articulate the university's long-term and sustainable commitment to diversity.
- Assess, respond to, and address policies, programmes, and structural realities that affect the climate and potentially prevent inclusion of underrepresented faculty members, including the importance of pursuing diversity and excellence as compatible and concurrent goals.
- Share your efforts and future plans that will promote inclusivity and diversity within the university, or department (such future efforts should be informed by the insights of the climate assessment report) through an accessible and comprehensive university or departmental website including critical information on promotion and tenure, dual career assistance, family friendly policies, disability accommodations, etc.
- Promote the benefits of diversity across the departments and highlight t that a variety of perspectives and identities among faculty can lead to a more culturally sensitive and innovative research community. Diverse role models working at university across disciplines can also positively influences students.
- Consider promotion of EDI principles in an individual's work as criteria for faculty awards and/or nominations.
- Proactively address inequities in salaries, start-up packages, merit raises, teaching assignments, levels of research and travel support, number of committee assignments, leadership opportunities, awards, allocation of offices and resources, and endowment appointments across the department.
- Ensure organisational policies are in place addressing swiftly and effectively instances of hate speech, violence, harassment and other forms of discrimination. These policies must protect members of the community who are subject to aggressions.
- Ensure departmental and university events, such as seminars and conferences, include diverse people, perspectives, and ideas.
- Engage and partner with various interdisciplinary centres and departments across campus.

2.5 OTHER POLICIES SUPPORTING EMPLOYEES WITH WORK-LIVE BALANCE

Focusing on the retention of female academics one common challenge is childcare. Above childcare and financial assistance were already mentioned. Other policies could facilitate a greater inclusive environment by improving the work-live balance. Examples from the University of Texas' Inclusive retention toolkit are:

- Organisations of social gatherings for families.

Informative events and distribution of informative materials about national legislation and organizational options for employees with family issues or international employees.

- Opinion surveys among employees gathering information regarding reconciling work and family obligations, well-being, and other topics.
- Supports for personal health and wellbeing.
- A reference person or office for the issue of work-family reconciliation (family- services) and issues concerning international employees.
- Work-live balance coaches for parents.

3. MATERIALS ON RETENTION AND TURNOVER

This section provides a collection of HR toolkits related to retention and development in general and best practices related to the retention of diverse and marginalised employees in particular.

1) AHP. **Building a Recruitment and Retention Plan**. Source: http://toolkit.ahpnet.com/Building-a-Recruitment-and-Retention-Plan/Step-1-Gather-Organizational-Baseline-Information.aspx

2) AICPA National Commission on Diversity and Inclusion. **RECRUITMENT and RETENTION TOOLKIT A Journey Toward a More Inclusive Workforce**. Source: https://us.aicpa.org/content/dam/aicpa/career/diversityinitiatives/downloadabledocuments/recruitment-retention-toolkit.pdf

3) BalticGender. **Family-friendly strategies in higher education & research: Best practice examples and recommendations from Baltic Gender project**. Source: https://oceanrep.geomar.de/43128/

4) Behavioural Health Education Center of Nebraska. **Retention Toolkits. Resources for Nebraska's Behavioral Health Workforce 2017**. Source: https://www.unmc.edu/bhecn/_documents/2017-retention-toolkit.pdf

5) Behavioural Health Education Center of Nebraska. **Retention Toolkits**. Source: https://www.naadac.org/assets/2416/samhsa-naadac_workforce_bhecn_retention_toolkit2.pdf

6) California Department of Education. **Teacher Retention Strategies.** Source: https://www.cde.ca.gov/pd/ee/documents/tchrretentionstrat.docx

7) Canada Research Chairs. **Creating an Equitable, Diverse and Inclusive Research Environment: A Best Practices Guide for Recruitment, Hiring and Retention.** Source: https://www.chairs-chaires.gc.ca/program-programme/equity-equite/best_practices-pratiques_examplaires-eng.aspx#h

8) CIPD. **Employee turnover and retention**. Source: https://www.cipd.co.uk/knowledge/strategy/resourcing/turnover-retention-factsheet

9) GARCIA. **Mapping organisational work-life policies and practices**. Source: https://eige.europa.eu/sites/default/files/garcia_report_mapping_org_work-life_policies_practices.pdf

10) Institute of Student Employers. **Social Mobility Toolkit: Development & Retention**. Source: https://ise.org.uk/page/social-mobility-development-retention

11) Minnesota Hospital Association. **Employee Retention Tool Kit.** Source: https://www.mnhospitals.org/Portals/0/Documents/policy-advocacy/workforce/employee-retention-workbook.pdf

12) Rogers, M. (2020). **A Better Way to Develop and Retain Top Talent.** Harvard Business Review. Source: https://hbr.org/2020/01/a-better-way-to-develop-and-retain-top-talent

13) Scotland Food & Drink. **Recruitment and Retention A practical guide for employers**. Source: https://foodanddrink.scot/media/2518/recruitment-retention-toolkit_web.pdf

14) SHRM. **Retaining Talent: A Guide to Analyzing and Managing Employee turnover**. Retrieved from: https://www.shrm.org/hr-today/trends-and-forecasting/special-reports-and-expert-views/documents/retaining-talent.pdf

15) The University of Texas at Austin. **Retention Toolkit**. Source: https://equity.utexas.edu/wp-content/uploads/2016/09/OIE_Retention_-SEPT2016_v1.2.pdf

16) Unilever. **Preparing people to adapt and thrive in changing times.** Source: https://www.unilever.com/news/news-search/2021/preparing-people-to-adapt-and-thrive-in-changing-times/

17) University of Michigan. **Retention Toolkit: Resources for retaining valued staff**. Source: https://hr.umich.edu/working-u-m/management-administration/additional-resources-supervisors-managers/retention-toolkit-resources-retaining-valued-staff

4. TRAINING COURSE ON THE ADVANTAGE OF GENDER BIAS IN COMMUNICATION

Communicating strategically is an important component in creating a resilient network and building a visible profile in an organization. Many informal conversations are part of an *informal negotiation* for resources, whether those resources are in the form of budgetary, financial, or private or public support. Gender bias offers women an advantage in a crucial element of effective negotiation strategy, but only when they become aware of the type of conversation they are in and adapt their communication approach accordingly.

In this short training, participants will understand how to recognize different types of conversation, will learn about evidence showing the effect gender bias has on negotiation outcomes, and will practice simple communication tools for engaging on interest, exploring perspectives, establishing options, and setting clear boundaries.

The choice of topics covered in this training, which are broadly communications and negotiations with a gender lens, are based on the analyses of the institutional surveys where participants could suggest topics for future training and chose from a list of topics. The topics below represent the topics that were chosen most and hence are covered in the training that was piloted:

- Learn to recognize the difference between discussion and dialogue
- Analyse your approach to informal negotiations
- Explore the value of gender bias in negotiation
- Practice using tools to engage and convince in mock conversations
- Using a case to conduct role playing in a negotiation situation

The training was delivered in three parts.

Part 1- introduction of basic concepts,

Part 2 - practice concepts and practical case study, and finally

Part 3 - where the link between the introduction of the concepts and the experience during the role playing, are reflected on and used to identify negotiation methods and needs for future purposes.

4.1 STRUCTURE OF THE TRAINING

Part 1: Introduction of basic concepts and identifying existing structures
The initial module focuses on introducing key definitions and issues at stake.

Concept and topics covered are;

- When gender bias is an advantage in communication
- Gender and leadership stereotypes
- Tightrope

See **ANNEX 2 for the content of this module.**

Part 2: Practice with concepts based on practical case study & role playing

The aim of the second part of the training was to practice tools in engaging and convincing negotiation styles, according to a pre-set role in a mock conversation. This module was based on a case-study that was provided to all participants, and participants were prescribed either role A or role B. In groups of two the participants were redirected to break-out rooms where they played out the case according to their role.

See **ANNEX 1 for an example of the case study that was used, for role A.**

Part 3: Linking concepts and identifying negotiation methods and needs

The last part of the training focused on the reflection of the roles played in the practical case study, and how these were link to the described concepts in part 1. This part was meant to create awareness of the different needs during negotiations and identify the possible framings.

The following concept were discussed;

- Leverage gender bias in dialogue
- Position based conversation & language
- Interest based conversation & language
- Inventory styles
- Reframing

See **ANNEX 2 for the content of this module**

4.2 METHODS USED IN THE TRAINING DELIVERY

The methods used to deliver this training was aimed to ensure presentation of key concepts, combined with practical hands-on experience and interactive learning. A safe space was created where participants could freely speak about their own experiences with having difficult conversations, in order for the trainer to reflect and guide the participants for future conversations.

Knowledge exchange and building a network between participants was stimulated, by using both plenary introduction of all participants, and small group conversations.

The following mix of methods was used:

- **Interactive online lecture** to introduce the basic concepts and approaches. An important aspect of using this method is being open to questions from participants at any point of the lecture and providing space for discussion about the concepts presented. The online platform Zoom was used, to allow participants to join from anywhere, while still being able to see each other.
- **Case study presentation** to demonstrate the presented concepts on the practical example of how they are implemented in the specific research project.
- **Group discussions / small group break out rooms** to foster the understanding of key concepts through discussing their application in short break-out sessions with peers and in the whole group with the trainer’s feedback.
- **Group work / role playing assignment** to foster the understanding of key concepts through working on the assignment applying them.

For the delivery of training the following should be considered:

- Preparation: the case study is shared on the day of the training with the participants, and there is time during the training to read this carefully.
- Timeline: the training last 2,5 hours. Each training part takes around 45 minutes, leaving room for a short break. Parts are divided in plenary sessions, questions and feedback, in small break-out rooms.
- Participants: this training works best for an audience of 12 to 20 per training.
- Trainer: the training needs to be ideally carried out by an experienced trainer with a background in communications, negotiations and gender bias.

4.3 TRAINERS AND PARTICIPANTS

The main target group of the presented training are female faculty at the institutions participating in the EQUAL4EUROPE project. This resulted in a rather diverse audience with various disciplinary backgrounds, with different ranks within academic institutions represented, making it an excellent environment to use the role-playing case, and having participants change positions.

Prior knowledge of the topic differed, which resulted in lively discussion and insights from many angles, where each participant was encouraged to share their own experience with the topic of negotiations.

The training was hosted by the Erasmus Centre for Women and Organisations, a key expert in the field. The facilitator of the training was Dory Grandia, associate director of Erasmus Centre for Woman and Organisations, at Rotterdam School of Management - Erasmus University.

This training is most suitable for an all-female group, both from the faculty as staff side of the institutions. All levels of experience, rank and positions are welcome and suitable to join. Ideally it is known to the trainer beforehand who is participating, so the case study exercise can be divided accordingly.

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ANNEX I - EXAMPLE OF PART OF THE CASE STUDY

A Difficult Conversation (A)

Confidential Instructions for Stefan Erkens

Glancing at your clock, you notice that it is already 11:30am. You are not looking forward to your lunch meeting with Saskia Visser scheduled for 12:30pm in the Faculty Club and, clearly, it is time to begin collecting your thoughts.

A rather distressed Saskia had stormed into your office earlier in the week with a copy of an email you had sent to Sebastiaan Vos outlining the research support he would be receiving for the year ahead, as well as the research assistants that have been assigned to him. It seems Sebastiaan had printed the email for his records and neglected to collect it from the staff printer. Saskia's distress was that she believed Sebastiaan was receiving considerably more support from the department than she was, in spite of her considerably larger contributions. In her heated articulation, she stated that this was clearly discriminatory and that the issue needed to be addressed as a matter of some urgency. This was particularly important because both she and Sebastiaan were coming up for tenure and promotion at the end of the next academic year.

As a relatively newly appointed chair of the Marketing Department at the University of Alkmaar, you were not directly involved in the decision to hire Saskia and Sebastiaan some five years earlier as tenure track assistant professors. However, both had completed their doctoral studies at top American schools and, as a senior member of the department at the time, you had fully supported their appointment.

Since joining the department, Saskia and Sebastiaan have worked hard to establish themselves. Sebastiaan is undeniably the better researcher. His publications outnumber Saskia's and two of them have appeared in the premier journals in the field. Although co-authored with senior faculty in the department, it is generally accepted that Sebastiaan was the key researcher and author on both publications. Saskia's three top publications are not co-authored with anyone in the department and not quite at the level of Sebastiaan's. You feel she seems to prefer working alone and doesn't socialize as much with colleagues. This is particularly apparent at post-presentation receptions held after the department bi-weekly research seminars[1].

From a teaching perspective, things are slightly different. Saskia's performance in the classroom is excellent. Fairly soon after joining the department she started to receive consistently high student evaluations. Students report to the programme directors that she always makes time to help them. She holds regular early afternoon office hours and responds quickly to emails when she is not physically available later in the day. Sebastiaan's teaching is solid. Although his student assessments are slightly below the average for the department as a whole, you are well aware that marketing is recognized across the business school for the quality of its teaching[2]. You have little doubt that Sebastiaan's teaching is above average for the entire business school at assistant professor level, and that he will also improve over time.

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1 Seminars are held from 3:00pm to 4:30pm every second Wednesday with drinks and snacks served thereafter. In common with other departments within the Business School, the department has a budget that enables it to also bring in leading external academics to give seminars rather than all the seminars being purely internal.

2 2 The Marketing Department's teaching excellence is also reflected in the volume of majors it draws from other departments and Faculties, as well as in the students it attracts directly to the university.

Over the years you have noticed that Saskia often volunteers to pick up an extra class when there are unplanned jumps in student numbers, and transfer students who need to be accommodated. Although the overload is compensated[3], and you have expressed your gratitude, you wonder if Saskia doesn't take on the extra teaching as an additional contribution designed to strengthen her tenure application and compensate for a perceived weakness in her research output. You are aware that her partner is an extremely successful businessman so the choice to do extra courses is unlikely to be related to financial need.

Beyond teaching and research, both Saskia and Sebastiaan contribute to the department and school through broader service. Saskia's contribution includes acting as an academic advisor and mentor to the Student Women's Network (SWN). The SWN has expanded considerably within the School and across the University of Alkmaar. To some extent this has occurred because diversity aspirations and gender-related key performance indicators (KPIs) for each of the seven Faculties have been explicitly added to the University's latest strategy. However, it is also clear that Saskia has been an influential faculty member and role model for many young women across campus.

Sebastiaan's service contributions notably include presenting a younger faculty member's perspective of life in the school at the most recent Business School Advisory Board meeting. The corporate executives who serve on the board were very impressed with him and expressed the opinion that "*with young faculty of this calibre, the future of the School is assured.*" Saskia attended the meeting along with a number of other junior faculty members. You recall being a little surprised when she arrived dressed so casually. In your opinion, although designer jeans and a Ralph Lauren polo shirt are fine as standard work clothes, and when teaching degree-taking students, they are not appropriate when attending advisory board meetings. It seemed apparent from the looks on their faces when Saskia contributed to the dialogue, that some of the board felt the same way as you do.

While Saskia and Sebastiaan are both outstanding young contributors, Sebastiaan is achieving clearly sufficiently better research results and greater engagement with school colleagues[4]. In your mind this objectively justifies the extra research assistant and extra €1,500 in research support he received. Saskia received a very respectable €3,500 in research and travel funding, a research assistant, and a MSc student grading assistant. You are sure that the dean, Sara de Haven, agrees with and supports your decision[5]. Sara has also informed you that Saskia was amongst the top 5% of assistant professor recipients of funding across the entire business school. Consequently, her distress seems completely misplaced to you.

Just before getting ready to walk to the Faculty Club, it strikes you that there may be an underlying gender issue. You struggle to comprehend that Saskia can believe the school is biased against its female Faculty members. After all, Sara de Haven is the dean of school! Also, although they tend to be younger and concentrated at the assistant and associate professor levels, Alkmaar Business School would rank in the top quartile of business schools in the latest Financial Times rankings[6] with respect to faculty composition. Having one-in-three full-time faculty being female is particularly impressive when one considers that the only Netherlands business school in the FT rankings, Erasmus University's Rotterdam School of Management, is only at 23%. Also, two of fifteen full-professors are women in the Marketing Department.

After the lunch meeting, and depending how it progresses, perhaps you should speak with Sara de Haven about the gender question? Unfortunately, it seems that some female faculty have an inclination to see issues totally unconnected to gender as having gender discrimination overtones.

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[3] Alkmaar Business School pays a course stipend that can be taken as a taxable salary supplement or transferred into an individual research account, at the discretion of the faculty member.

[4] Sebastiaan Vos was an intercollegiate athlete as undergraduate student at Duke University in North Carolina and he plays on the School's faculty social football team together with you and a number of other senior Dutch faculty members. Since he joined, the business school team has consistently beaten the School of Economics, much to the joy of all.

[5] Research stipends as well as research and teaching assistant allocations are discussed with the dean before notifications are emailed to faculty members.

[6] http://rankings.ft.com/businessschoolrankings/global-mba-ranking-2017, accessed June 15, 2017.

ANNEX 2 – TRAINING CONTENT

EQUAL4EUROPE

GENDER EQUALITY PLANS

The project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no GA872499

When is gender bias an advantage in communication?

Erasmus Center for Women and Organisations
Dorothy Grandia, associate director
Rotterdam School of Management – Erasmus University

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Can you recall a ‘critical communication incident’?

Share the story in a breakout room:
When did you have a ‘difficult’ conversation? What made it difficult?
Was it a negotiation in disguise?

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Do you experience a 'tightrope'?

Common gender stereotypes

Feminine (Communal)	Masculine (Agentic)
• Sympathetic	• Competitive
• Gentle	• Adventurous
• Sensitive	• Aggressive
• Supportive	• Courageous
• Kind	• Dominant
• Nurturing	• Stands up under pressure

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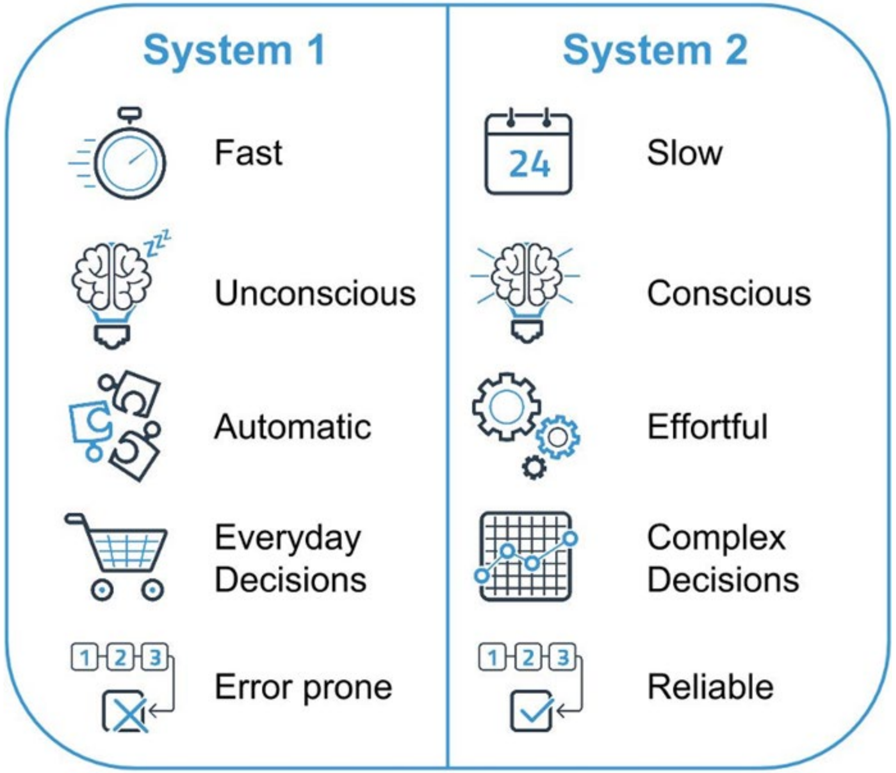
Gender and leadership stereotypes

- Leaders are self-confident, assertive, take charge, solve problems, inspire others
- Men are dominant, assertive, forceful, & take charge
- Women are nice, friendly, socially skilled, sensitive



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Comparing the ratings of male and female leaders

	Which leaders rated themselves higher	Which leaders did male observers rate higher	Which leaders did female observers rate higher
Envisioning	Neither	Men	Women
Empowering	Neither	Neither	Neither
Energizing	Women	Women	Women
Designing and Aligning	Women	Women	Women
Reward and Feedback	Neither	Women	Women
Outside Orientation	Women	Women	Women
Tenacity	Neither	Women	Women
Emotional Intelligence	Women	Women	Women

(Harvard Business Review 2009)

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Do you experience a tightrope?

Women walk a tightrope of being seen as too feminine, which gets read as less competent, and too masculine, which gets read as not likeable.

Too feminine: liked but not respected

Too masculine: Respected but not liked

Studies reveal to get ahead you have to be both liked and respected

Patterns of the bias:

- Body language
- Conversational style
- Office house work

[from What works for women at work, Dempsey and Williams]

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We follow confident leaders

Increasing confidence →→→→→

will be followed; isn't competent	SUPERSTAR!!!!
won't be followed; isn't capable	capable but won't be followed

Increasing competence →→→→→

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We follow engaged leaders

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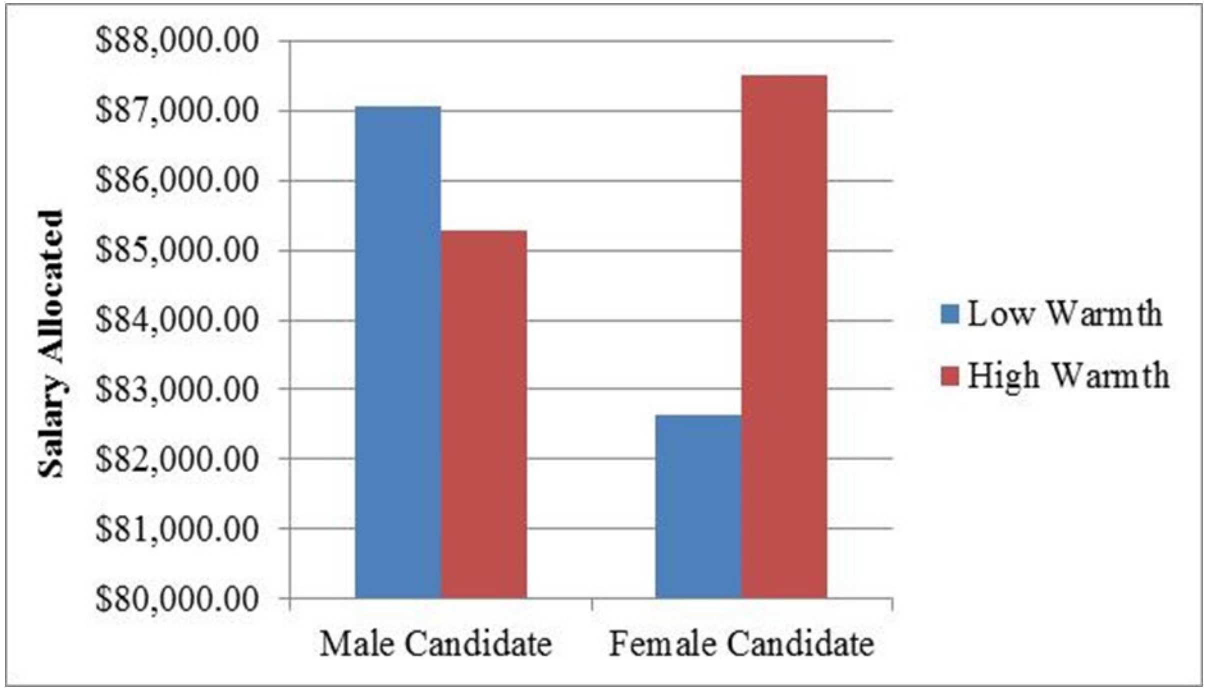
Salary offer differs according to assessment of ‘warmth’



Toosi, Mor, Semnani-Azad & Phillips, in prep

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Saskia and Stefan

Take 10 minutes to read through your role

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How can we leverage gender bias in dialogue?

1. Framing value of agreement around others
2. Spending more time in interest-based conversation

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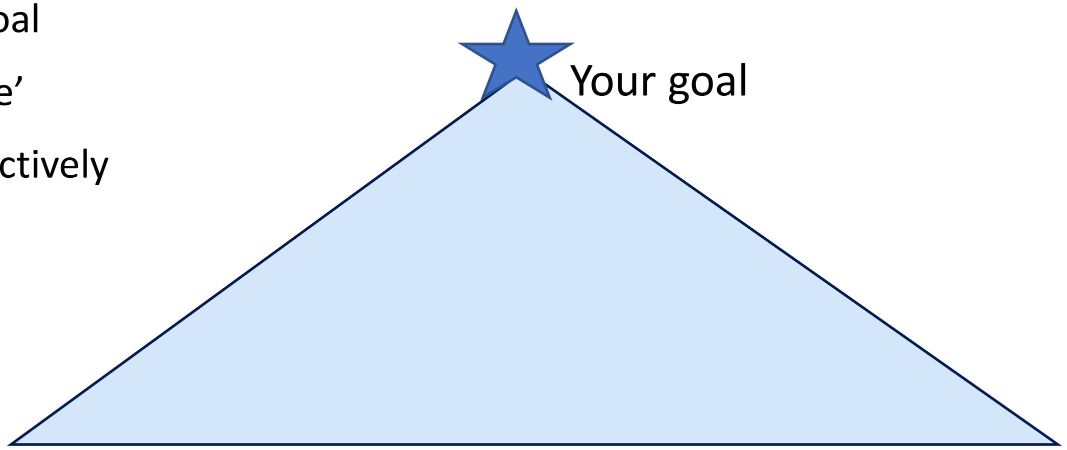
Position vs. interest conversations

- Position-based conversation:
- Advocating a specific goal
- ‘Discussion’ and ‘debate’
- Yes/no answers to objectively
- measurable criteria
- Speaks in answers
- and solutions



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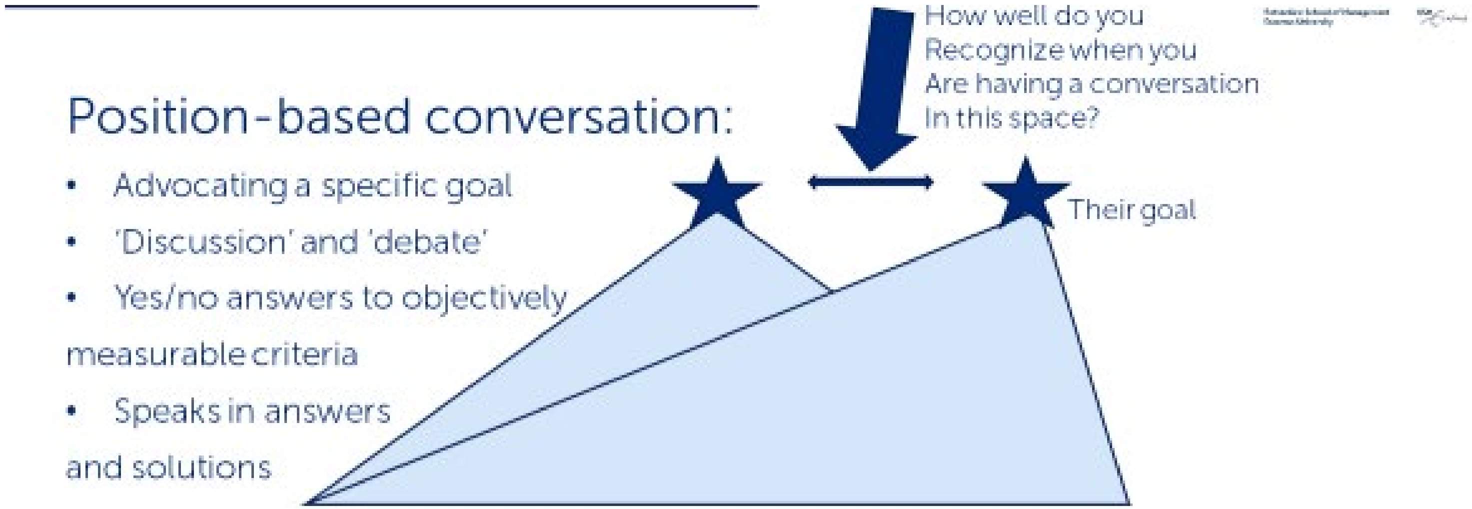
Position vs. interest conversations



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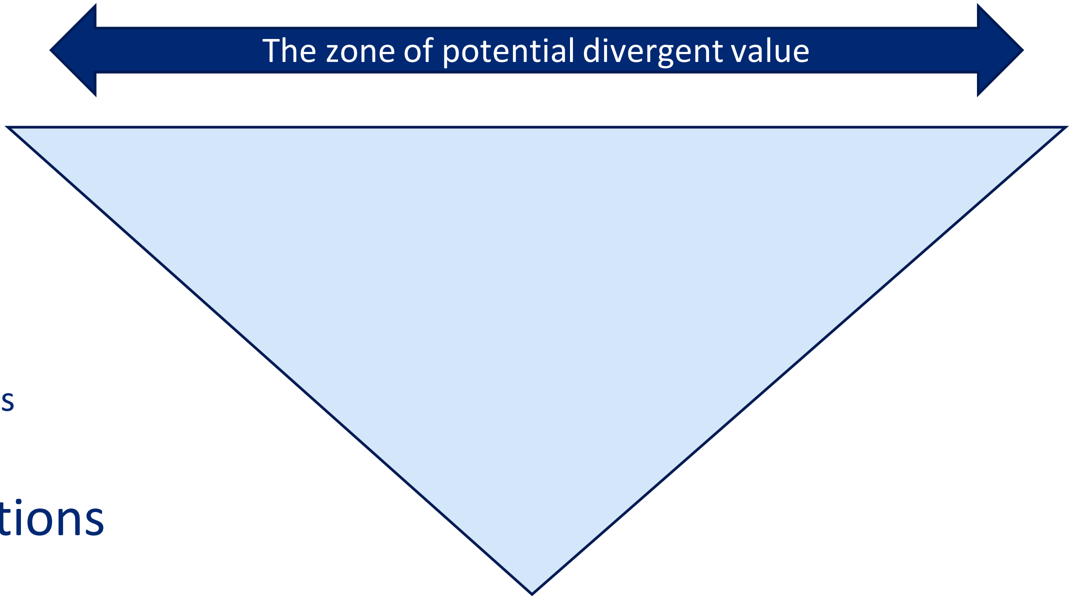
Position vs. interest conversations



- Inquiring to establish perspective
- ‘Dialogue’
- Open questions
- Explores options and possibilities

Interest-based conversations

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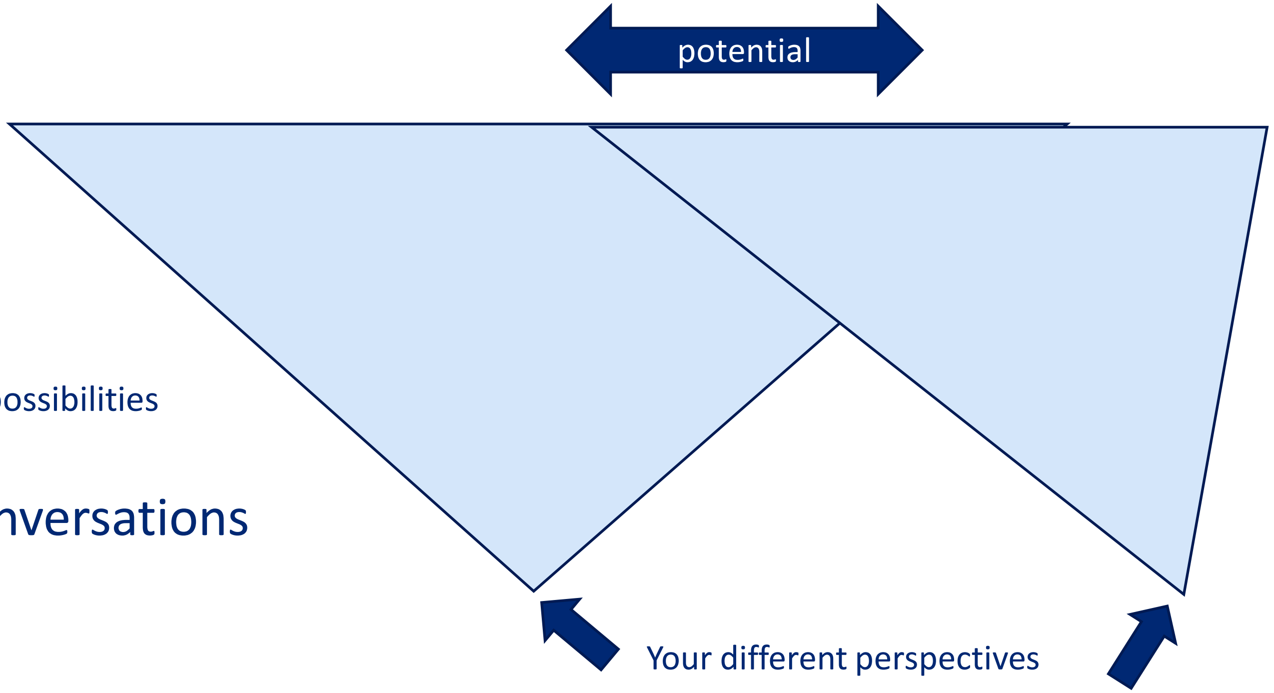
Position vs. interest conversations

- Inquiring to establish perspective
- ‘Dialogue’
- Open questions
- Explores options and possibilities

Interest-based conversations



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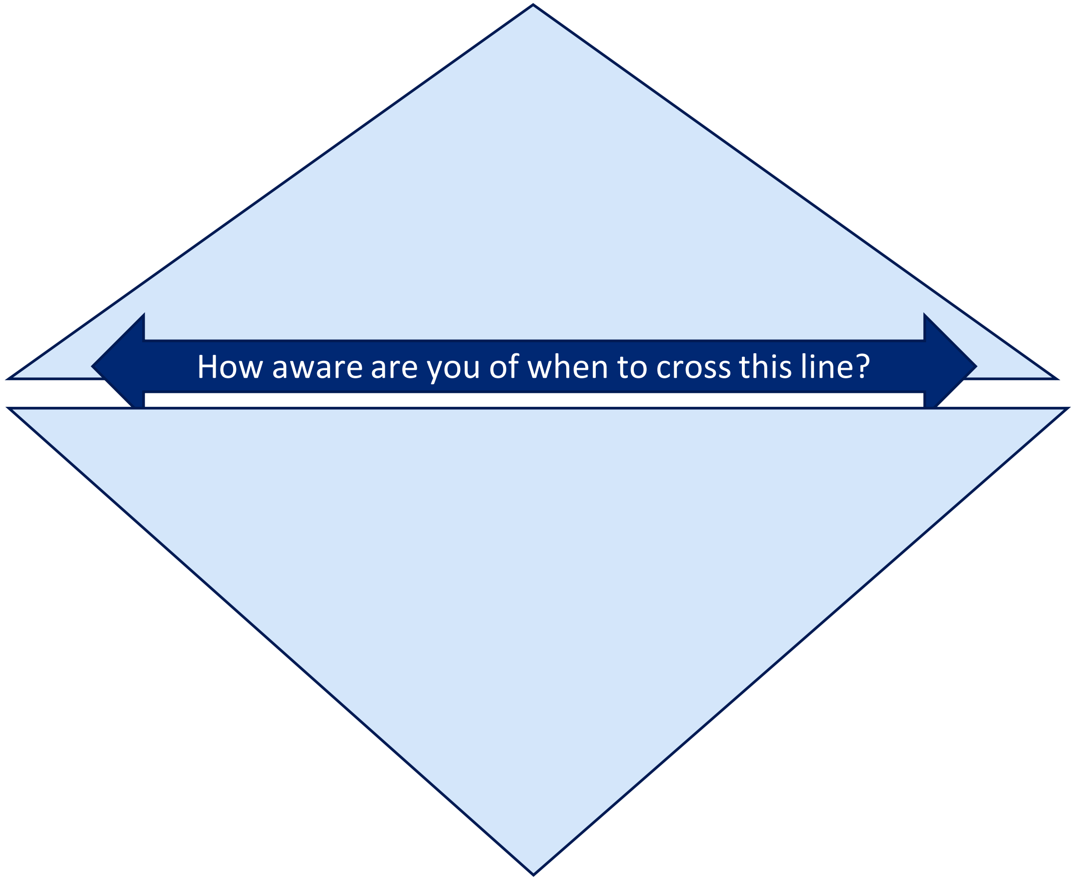
Position vs. interest conversations



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Position vs. interest conversations

POSITION LANGUAGE (deal-making)

- specific
- yes or no questions
- Focusses on clarity in the external
- ‘’would you accept $50,000 if you are able to work two days a week from home?”

INTERESTS LANGUAGE (inquiry)

- Used to investigate underlying interests
- Open questions
- Helps diffuse conflict
    - ‘’In what way is working from home important to you?”
    - ‘’Which options are you considering?”

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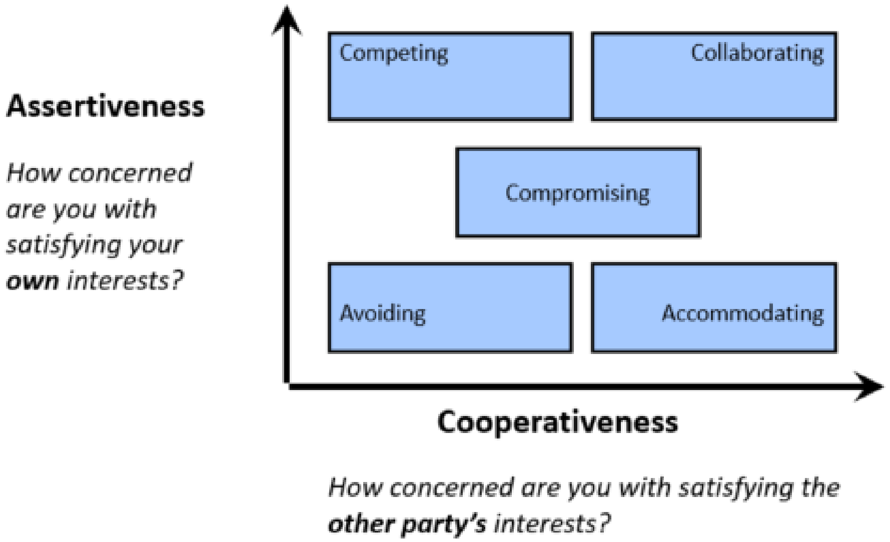
Communication: what contributes to a speaker…



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Thomas Kilmann Inventory styles

	Good for …	Risk of …
Collaborating	Finding integrative solutions; creating joint value	Investing unwarranted time and energy in problem-solving
Compromising	Reaching quick settlements; giving impression of fairness	Failing to create joint value; making unnecessary concessions
Avoiding	Trivial issues; when partner needs to cool off	Appearing disengaged; failing to resolve real problems
Competing	Claiming value on zero-sum issues; defending from attack	Alienating other parties; failing to create joint value
Accommodating	Appeasing important parties; building relationships	Conceding more than needed; failing to claim relational credit

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Communication caveat: know thyself first

First, become aware of your own power:

1. POWER Know your BATNA, investigating their BATNA
2. MOTIVATION Understanding the underlying interests – yours and theirs
3. SCOPE OUT NEW GROUND Map out creative options to exploit unrecognized (divergent) value
4. JUSTIFICATION Incorporate potential appeals to social structures on basis of legitimacy
5. BOUNDARIES Make clear and well-specified commitments
6. DIFFERENTIATE BETWEEN PERSONAL/SOCIAL AXIS Plan for empathetic communication with people, but clear assertiveness on boundaries
7. ACT IN FAITH Trustworthiness in relationship

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Leadership styles (Goleman, 2000)

	Coercive (Threat)	Authoritative (Vision)	Affiliative (Accommodate)	Democratic (Participative)	Pacesetting (Results-oriented)	Coaching (Development)
When Appropriate	In a crisis, start a turnaround, or with problem employees	When change needs a new vision or when a clear direction is needed	To heal problems within a team or to motivate during successful times	To build buy-in or consensus, or to get valuable input from employees	To get quick results from a highly motivated and competent team	To help an employee improve performance or develop long-term strengths
Objective	Immediate compliance	Mobilize others to follow a vision	Create harmony	Build commitment through participation	Perform tasks to a high standard	Build strengths for the future
Impact on Climate	Very Negative	Very Positive	Very Positive	Very Positive	Very Negative	Very Positive
Competencies	Drive to Achieve; Initiative; Emotional self-control	Self-confidence; Empathy; Change Catalyst	Empathy; Building Bonds; Conflict Management	Collaboration; Team Leadership; Communication	Conscientiousness; Drive to Achieve; Initiative	

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Reframe a competitor away from positioning:

Toward interests:

'What about this aspect is important to you?'

Toward value for others:

'How can find options that incorporate my team's interests?'

Toward joint problem-solving:

'How can we find a way to satisfy my needs without compromising your position in future agreements?'

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Diffusing emotion and investigating options - REFLECT

Repeat back to communication partner what you are hearing from them. Partner feels ‘heard’ and has chance to clarify. Also possible to interpret emotional content.

‘’It sounds like it’s very important to you to ensure that this shipment is delivered within the next six weeks.’’
‘’It sounds like you’ve had a frustrating experience with late shipments in the past.’’

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Diffusing emotion and investigating options - SUMMARIZE

Bring elements of their position/interest into summary, include your interests into conversation landscape. Partner feels ‘heard’ and has chance to clarify. You can establish shared interests but also identify different interests or negotiation gaps.

‘’You want a guarantee that the order has been shipped two weeks from now in order to feel sure the shipment arrives within six weeks. I am confident that the shipment will arrive on time even if it is shipped three weeks from now. My team has concerns about quality control if they ship in two weeks. We both want the shipment to arrive on time within six weeks.’’

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Diffusing emotion and investigating options - EXPLORE OPTIONS

Ask for or offer options that would satisfy the underlying interests of both parties.

Bring in other stakeholders if possible.

Avoiding style:

"Perhaps we should come back to the delivery date issue once we have agreed on quality control issues."

Accommodating style:

"Would you prefer a penalty for late delivery, a guarantee from the shipper of on-time delivery? Or something else?"

Compromising style:

"I can offer a 10% penalty for late delivery but you must accept we cannot ship within two weeks."

Competitive style:

"I can offer a 10% penalty for late delivery."

Collaborative style:

"What options would give your team enough assurance of receiving the shipment on time while also ensuring that our team can double check on the production quality?"

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Further information

Equal4E

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- Include link to the project's website:

https://equal4europe.eu/

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