

Data for Athena SWAN Applications Guidance for Schools

Your Self-Assessment Team (SAT) or Equality and Diversity Committee (EDC) will require data for all Athena SWAN Award applications and subsequent monitoring (as per your action plan).

Responsibility for the provision of all data for applications and monitoring is as follows:

Type of Data	Provided By
All staff data including training and benchmarking data	Strategic Planning and Governance Team financehr-systems@bristol.ac.uk
Student data	Student Systems and Information (SSIO) www.bristol.ac.uk/ssio/informationrequestform/
REF data	Ruth Quinn RED (Ruth.Quinn@bristol.ac.uk)

Process

- ERP has now taken over from the University's previous HR and finance systems. Currently, Athena SWAN report requirements are being programmed into the system with a view of having the new reports available and sent to all schools on **1st December 2018**.
- The Strategic Planning and Governance Team (financehr-systems@bristol.ac.uk) will be providing all staff data to SWAN leads. The data provided will cover 1 academic year for all those already in receipt of annual SWAN reports (i.e. those who are applying/applied for SWAN awards).
- For all schools looking to begin the SWAN process, 2 years of historic data from PIMS and 1 years data from ERP will be provided. If you require this before 1st December 2018 please request to the Strategic Planning and Governance Team in good time.
- If you require data beyond 3 years (which is more difficult to capture and only if this is an absolute requirement) please request this to the Strategic Planning and Governance Team in good time.
- Staff SWAN reports will be provided to all school SWAN/EDI leads on **1st December every year**. This provides enough time for data analysis for departmental April and November submissions the following year (providing you with the most recent data for the previous academic year).
- Essential ad hoc requests for SWAN data **before 1st December 2018** should be directed to financehr-systems@bristol.ac.uk, however you are strongly encouraged to work to the annual report release date.

EDI Officer
Equality, Diversity and Inclusion Team
July 2018
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- For all other data (e.g. survey data, student data, REF data etc.) you should liaise directly with the relevant teams and contacts as far in advance as possible and create an ongoing calendar of data requirements so that you and they can plan your workloads accordingly. The final aim being to have an annual programme of data coming to your SAT/EDI Committee for monitoring as per your action plan.
- You will need to provide each team/point of contact with your exact requirements (e.g. copy and paste the student questions from the application form into the SSIO information request form).
- It is likely that you will choose to monitor some data that isn't a specific requirement of the application, such as Open Day attendance, and you will need to establish how you are going to obtain that data and make arrangements with the necessary team/contact.
- If you identify any problems with your data please liaise with the relevant team/s directly. If any issues arise that may have implications for other schools and/or all staff data please let the EDI Officer know.
- All data should use the date range 1 August – 31 July and/or the single date of 1 August, depending on the nature of the question.

Data Handling

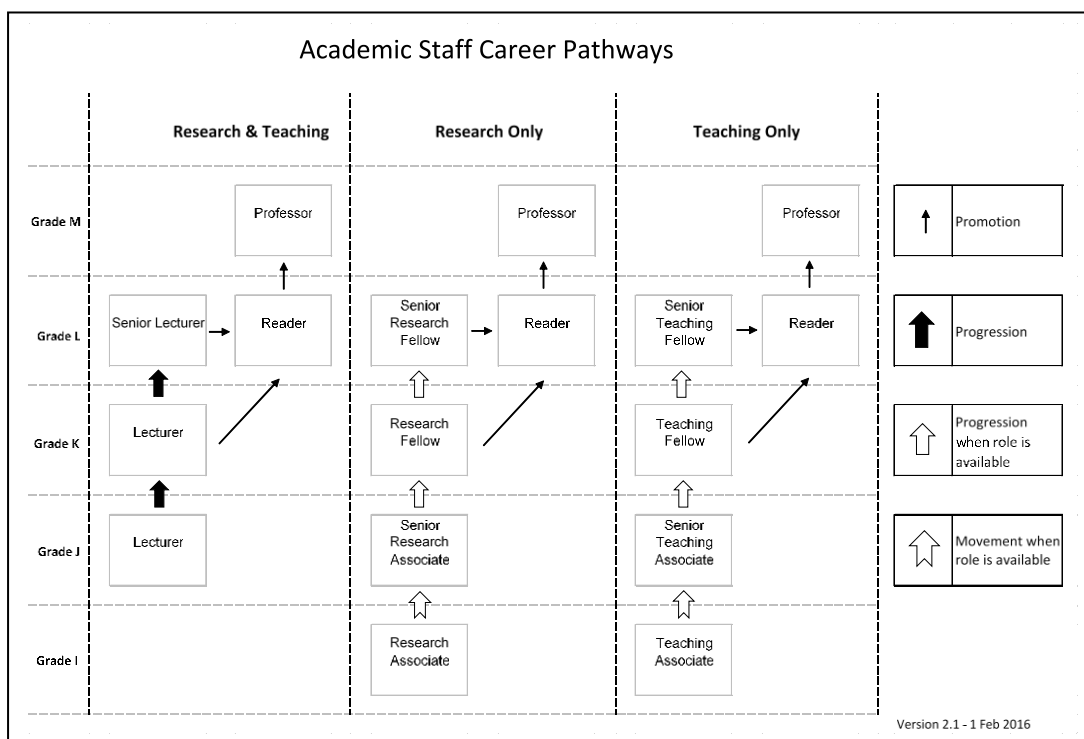
Please note that you may handling data that may contain identifiable information that is covered by the Data Protection Act. As such, the reports should not be e-mailed without encryption (please do not include the password in the same e-mail). A better approach is to set up a secure shared filespace (IT can arrange this for you); [Google Drive](#) and [Microsoft One Drive](#) are also acceptable as long as access is limited only to those who need to see the information. Please contact us if you are unsure about anything in this regard.

Please refer to [the University's Information Security pages](#) for more guidance on your data handling responsibilities.

Please note – This data guidance will be updated in line with developments and change to ERP reporting and changes in governance of reporting.

Academic Grade Equivalents and Exception Grades

The new SWAN guidance asks for data to be presented by grade as opposed to the previous SWAN categories you may be familiar with. This infographic shows the grade structure against the categories and pathways.



A few schools may have Exception Grades amongst their data. The following table highlights the most common and what job role they refer to. It is up to you how and where you categorise these individuals as these grades would have been assigned on a case by case basis (and at School level you may know who these individuals are or your Faculty HR Teams may be able to advise further). In some instances these individuals may cover various grades and so this may need exploring within your SAT as to the best way to assign them. For any X grades not in the table below, please let the EDI Officer and Strategic Planning and Governance Team know and they can advise.

Exception Grades			
Category	Group	Grade	Job Role
X	C	CSL	Consultant Senior Lecturer
X	C	PROF	Professor
X	C	SL/R	Senior Lecturer/Reader
X	C	SPR	Specialist Registrar
X	O	CSL	Consultant Senior Lecturer
X	R	KTP	KTP Research Fellow
X	R	MC	Marie Curie Research Fellow
X	R	MISC	Miscellaneous Research Staff

Professional Services Grades

The following table shows the Professional Services Grades against Job Titles and Family type.

Admin/Professional Staff (Family A)	
Grade	Typical Job Titles
C	Administrative Assistant
D	Administrative Assistant
E	Administrative Assistant
F	Administrator or Personal Assistant
G	Administrator, Supervisor, Advisor or Personal Assistant
H	Advisor or Executive Assistant
I	Officer or Deputy Manager
J	Officer or Manager
K	Manager or Team Leader
L	Manager or Team Leader
M	Director or Assistant Director
Technical Staff (Family T)	
Grade	Typical Job Titles
A	Technician
B	Technician
C	Technician
D	Technician
E	Technician
F	Technician
G	Technician
H	Senior Technician
I	Senior Technician or Deputy Manager
J	Deputy Manager
K	Technical Manager
Operational staff (Family O)	
Grade	Typical Job Titles
B	Assistant
C	Assistant
D	Assistant, Supervisor
E	Senior Assistant, Supervisor, Adviser
F	Assistant, Team Leader, Tradesperson
G	Advisor, Supervisor or Assistant Manager
H	Senior Advisor, Manager, Coordinator
I	Senior Advisor, Officer, Deputy Manager
J	Officer, Manager
K	Manager
L	Senior Manager / Assistant Director

Additional information

It is likely that you will need information or guidance from your Faculty HR Teams on a variety of topics covered by the application form, such as:

- Induction
- Staff Review and Development

EDI Officer

Equality, Diversity and Inclusion Team

July 2018

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- Training
- Career progression support
- Cover arrangements for maternity and other types of leave
- Flexible working
- HR policies

It is strongly recommended that you ask your Faculty HR Managers to attend your SAT/EDI Committee meetings to help with any queries or clarification needed, or please contact your relevant HR contacts as appropriate <http://www.bristol.ac.uk/hr/contact/> .

Athena SWAN Data Checklist

Please use the following checklist to ensure you have received all data for your submission.

Staff Data			
Section	Data Required	Data Source	Received
Academic and research staff data	Academic staff by grade, contract function and gender: research-only, teaching and research or teaching-only	Strategic Planning and Governance Team	
	Academic and research staff by grade on fixed-term, open-ended/permanent and zero-hour contracts by gender	Strategic Planning and Governance Team	
	Academic leavers by grade and gender and full/part-time status	Strategic Planning and Governance Team	
Key career transition points: academic staff	Recruitment Break down data by gender and grade for applications to academic posts including shortlisted candidates, offer and acceptance rates	Strategic Planning and Governance Team	
	Promotion Provide data on staff applying for promotion and comment on applications and success rates by gender, grade and full- and part-time status.	Strategic Planning and Governance Team	
	Direct Appointments Data	Strategic Planning	

		and Governance Team	
	Department submissions to the Research Excellence Framework (REF)	RED	
Flexible working and managing career breaks Note: Present professional and support staff and academic staff data separately	Maternity return rate	Strategic Planning and Governance Team	
	SILVER APPLICATIONS ONLY Provide data of staff remaining in post six, 12 and 18 months after return from maternity leave.	Strategic Planning and Governance Team	
	Paternity, shared parental, adoption, and parental leave uptake	Strategic Planning and Governance Team	
Student Data			
Section	Data Required	Data Source	Received
Student data	(i) Numbers of undergraduate students by gender	SSIO	
	(ii) Numbers of men and women on postgraduate taught degrees	SSIO	
	(iii) Numbers of men and women on postgraduate research degrees	SSIO	
Benchmarking Data			
Throughout application	National Benchmarking against subject	Strategic Planning and Governance Team	