MESSAGE

Medical Science Sex and Gender Equity

Policy Lab Briefing Pack

Sustaining, growing and learning from implementation of sex and gender policies

Tuesday 1st October 2024

MESSAGE

The George Institute for Global Health UK

IMPERIAL

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The MESSAGE project

MESSAGE (Medical Science Sex and Gender Equity) is a policy initiative to improve the **integration of sex and gender considerations in data collection, analysis and reporting in UK biomedical, health and care research**.

The aim of the project is:

To co-design and implement a policy framework for funders which will ensure that biomedical, health and care researchers account for sex and gender in their funding applications and research projects.

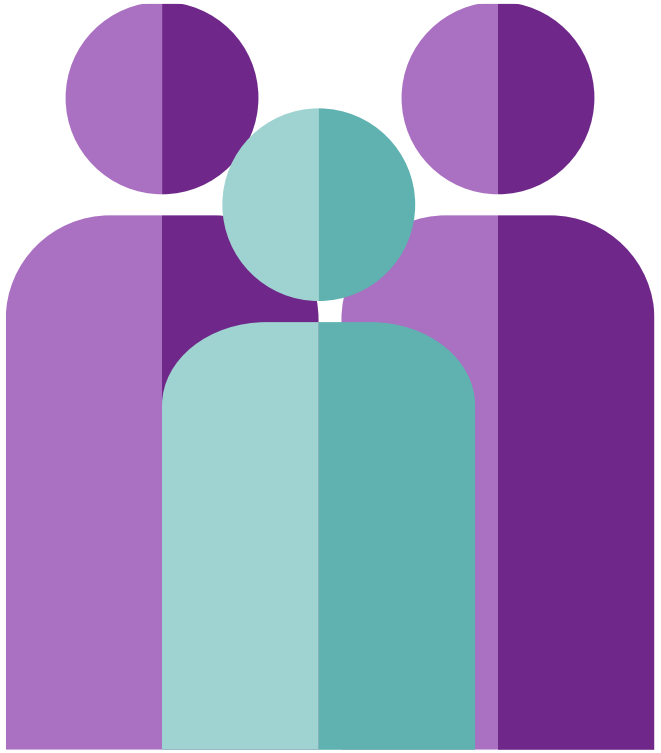
We are supporting co-design of a policy framework over the course of four Policy Labs, collaborative workshops which bring together a range of stakeholders around a particular challenge to:

Develop new ideas and practical approaches to address a real-world problem

Understand barriers and facilitators for bringing about that change

Improve outcomes for users and patients

Contents of this Briefing Pack



Progress since Policy Lab 3

So far, we have held three Policy Labs over 2023-24

In Policy Lab 1 (May 2023) we identified two principal **priorities for sex and gender policy work** in the UK:

Sex and gender policies should be designed and delivered through a whole system approach.

Technical capacity-building and culture change across the research sector is needed to support policy implementation.

In Policy Lab 2 (Sept 2023)

we **co-designed a gold standard sex and gender policy framework** for UK biomedical, health and care research funders.

In Policy Lab 3 (Jan 2024)

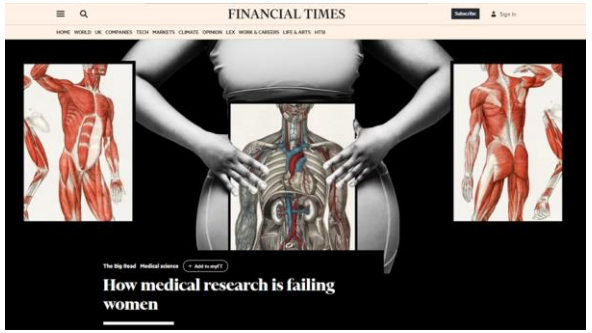
we planned for **implementation of sex and gender policy activities** by UK research funders, including a roadmap, timeframe and milestones for change, with implementation tools to support roll-out.

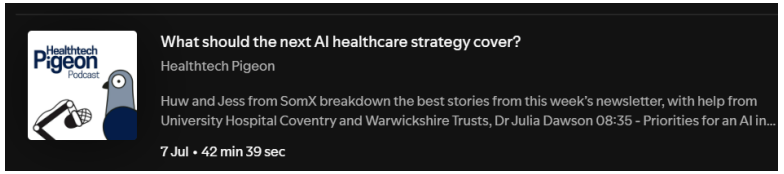
During Policy Lab 3, we established a shared timeframe and milestones for sector-wide change

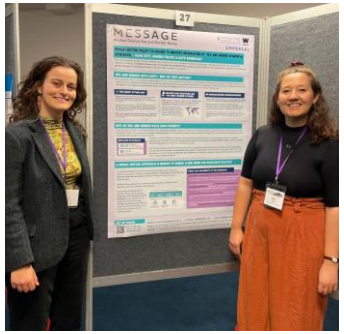
Year 1	Year 2	Years 3-4	Years 4-5	Year 6+
Funder milestones				
Implementation of funder sex and gender policies		Applications which do not account for sex/gender receive lower scores	Applications which do not account for sex/gender are not funded Applications which do not account for sex/gender in a high-quality way receive lower scores	Applications which do not account for sex/gender in a high-quality way are not funded
Publisher milestones				
	Introduction of a question for peer reviewers on whether a paper has accounted for sex/gender	Peer reviewer feedback highlights that papers need to account for sex/gender to be accepted		Papers which do account for sex/gender in a high-quality way are not accepted
Regulator milestones				
Launch of MHRA and HRA diversity guidance	MHRA & HRA: Introduction of a question in approvals process about how sex/gender are accounted for NICE: Introduction of a question in guideline consultations about how sex/gender are accounted for		MHRA & HRA: Applications which do not account for sex/gender are less likely to be accepted NICE: Guidelines which do not account for sex/gender will need to be reviewed and revised	MHRA & HRA: Applications which do not account for sex/gender are not accepted NICE: Guidelines which do not account for sex/gender are not accepted

Since PL3, we have…

- Finalised the **MESSAGE policy framework**
- Worked 1:1 with funders to support and tailor **implementation processes**
- Produced **guidance** materials
- Launched an online **database of best practice**
- "**Spread the MESSAGE**" through media, speaking events and public engagement







Aim and scope of Policy Lab 4

Policy Lab 4 will focus on learning from, sustaining and growing impact

The central question of PL4 will be:

How can we assess the impact of funders "adopting MESSAGE" to sustain and grow our collective success?

This question will be answered by **representatives from across the research sector**, including:

- Funding organisations *(Government and charitable)*
- Regulators
- Publishers
- Patient representatives
- Researchers

After PL4, you will have the tools to **monitor and evaluate the implementation of sex and gender policy activities** and continue work to achieve the sector's **joint vision and timeframe for change**.

Going forwards, we hope you will **use the network established through the MESSAGE Policy Labs** to troubleshoot implementation challenges, establish cross-sector partnerships, and evaluate sector-wide impact.

Agenda

Time	Session
10:00*	Welcome and progress since Policy Lab 3
	Troubleshooting implementation challenges
	A vision for monitoring and evaluating impact
	What is needed to sustain and grow impact?
13:00	Lunch
13:45	Looking ahead
	Communicating changes: What is “the MESSAGE”?
15:45	Next steps and thanks
16:00	Close

*There will be a break during the morning session

What can you do to prepare?

Read and reflect on this briefing pack

- What are your immediate responses?
- What is missing? What is striking?
- Did you learn anything new?

Consider how your organisation currently monitors impact

- What data do you already collect?
- How do you ensure users adhere to organisational policies?
- What further information do you need?

Speak to your colleagues to hear their thoughts

- What are their main concerns regarding monitoring and evaluation of sex and gender policy activities?
- What ideas do they have about how you can prepare for this change as an organisation?

Be prepared to share your thoughts on the day

House rules

Policy labs rely on all participants feeling comfortable to engage in open discussion, to share their honest perspectives, and to suggest ideas on issues which can be sensitive and prompt strong opinions.

We expect all participants to follow our code of conduct:

1. This is an **inclusive space** where people of all sex and gender identities are welcome and valued. Please respect people's chosen pronouns and opinions.
2. To ensure we hear a range of opinions and ideas, we ask that after you have spoken you **allow at least three other people to speak before speaking again**, unless you are called on to respond.
3. **Avoid academic or practitioner jargon** where possible.
4. All discussions will follow Chatham House Rules, meaning that **anything said will not be linked back to individuals in any publications or reports** of the event. We ask that you adhere to the spirit of these rules in your actions during and after the day, including not live tweeting (or similar).
5. We will **record sessions** for the purposes of creating an accurate record of the discussion. Only the research team will have access to this, and it will be destroyed after use according to data protection regulations.

What happens after PL4?

The MESSAGE **policy framework** will be launched publicly in **November 2024**

MESSAGE **guidance materials** will be launched in autumn 2024 on the MESSAGE website

- Funder toolkit
- Clinical handbook
- Pre-clinical handbook

The MESSAGE website will continue to host **News** from our stakeholders, as well as best practice sex and gender research on our new **Resource Library**. You can share your News updates and best practice Resources to be hosted on the site!

The MESSAGE team are **seeking funding to continue to provide support** to the stakeholder consortium. We are also looking to secure funding for **follow-on projects**, including:

- Designing an action plan for **academic publishers**
- Improving inclusion of **pregnancy and breastfeeding** in research
- Translating sex and gender evidence into **medical education & clinical guidelines**
- Identifying methodologies for sex and gender data collection **across cultures** (UK-India)

Monitoring and evaluation (M&E) to understand the impact of “adopting MESSAGE”

Assessing high-quality integration of sex and gender

A standardised scoring system will support cohesive evaluation across the sector

Slide 20 sets out a framework for evaluating whether an application has accounted for sex and gender to a standard that is:

- Excellent
- Satisfactory
- Unsatisfactory

Review the scoring framework and consider how it could be refined.

- Should any additional categories be included?
- What further information do reviewers need to make an assessment for each category?
- Would it be useful to apply scores to each section?

	Unsatisfactory	Satisfactory	Excellent
Sex and/or gender characteristic(s) of participants/subjects to be considered	Description given of the sex and/or gender characteristic(s) to be considered, but no justification given for this choice. Sex and gender terms are used incorrectly* and/or interchangeably.	Clear description given of the sex and/or gender characteristic(s) to be considered, alongside a justification for this choice. Sex and gender terms are used correctly.	Clear description given of the sex and/or gender characteristic(s) to be considered, including a detailed justification for this choice which references relevant literature (where possible). Sex and gender terms are used correctly.
Target distribution by sex and/or gender	The study population includes participants/subjects of more than one sex and/or gender. No justification is given for the planned proportion of participants/subjects by sex and/or gender. **OR** The study population is restricted to one sex and/or gender and no justification is given.	The study population includes participants/subjects of more than one sex and/or gender. A reasonable justification for the planned proportion of participants/subjects by sex and/or gender is given. **OR** The study population is restricted to one sex and/or gender and a justification is given.	The study population includes participants/subjects of more than one sex and/or gender. A reasonable and detailed justification for the planned proportion of participants/subjects by sex and/or gender is given, which references relevant literature where possible. **OR** The study population is restricted to one sex and/or gender, and a detailed justification for this choice is given, which references relevant literature where possible.
Planned strategies for achieving the target sex and/or gender distribution of participants/subjects**	No strategies are given, without adequate justification.	Reasonable strategies are proposed, demonstrating consideration of means of engaging historically underserved sex/gender groups. **OR** No strategies are given and a justification is given (e.g. the study population is justifiably restricted to one sex and/or gender).	Strategies are proposed which demonstrate in-depth consideration of existing literature and propose innovative means of reaching historically underserved sex/gender groups. **OR** No strategies are given and a detailed justification is given (e.g. the study population is justifiably restricted to one sex and/or gender), which references relevant literature where possible.
Sex- and/or gender-disaggregated analysis	Planned sex- and/or gender-disaggregated analysis is methodologically unsound. For example, analysis will compare the main effects between sex/gender groups, without testing the interaction and quantifying the difference. Or proposed analysis plans adjust/control for sex/gender. **OR** No sex- and/or gender-disaggregated analyses are planned, without adequate justification.	Sex- and/or gender-disaggregated analyses are planned and are methodologically sound. Interaction terms are added for the determinant of interest and sex and/or gender, without interaction terms for other covariables. Sex and/or gender differences are presented on one risk scale. **OR** No sex- and/or gender-disaggregated analyses are planned and justification for this choice is given (e.g. the study population is justifiably restricted to one sex and/or gender).	Sex- and/or gender-disaggregated analyses are planned and are methodologically robust. A full interaction model is used and sex and/or gender differences are presented on both the absolute and relative risk scale. **OR** No sex- and/or gender-disaggregated analyses are planned and a detailed justification for this choice is given (e.g. the study population is justifiably restricted to one sex and/or gender), which references relevant literature where possible.

*For sex, the terms female, male and I/VSCs should be used. For gender, the terms women, men and non-binary and/or cis and trans should be used.
**For clinical research, the focus is on recruiting and retaining participants. For pre-clinical research, the focus is procuring, managing and storing/housing subjects. For secondary research, a description of the sex and/or gender distribution of participants in the original dataset should be provided.

Monitoring and evaluating policy implementation

Possible metrics for monitoring and evaluating policy implementation

Hunt et al. identify five metrics for monitoring and evaluating policy implementation:

1. Number and proportion of **proposals** that include sex- and gender-based analysis (SGBA).
   - Number of applications which integrate sex and gender. (CIHR)
   - Percentage of projects taking into account the gender dimension based on Y/N tickbox on application form. (Horizon)
2. Number and proportion of proposals that include **quality SGBA**.
3. The **quality** of evaluators' scoring and comments (qualitative analysis).
4. Number of applicants, evaluators and staff who engaged in **trainings** and in what type of training.
5. **Number and proportion of peer-reviewed publications** that result from funded proposals that incorporated SGBA (Tracking research outputs using grant numbers).
   - Publications from CIHR-funded research containing the keyword sex or gender. (CIHR)

Other metrics in use to evaluate funders' sex and gender policies include:

Sex/gender of included participants:

- Percentage of clinical research participants who are women. (NIH)
- Percentage of women participants. (Horizon)

Funds spent on sex- and gender-sensitive research:

- Quantity of funding spent on research which accounts for sex and gender. (CIHR)
- Number of research projects funded within specialised centres on sex differences. (NIH)
- Total funding awarded to supplement work to examine sex as a biological variable and success rate of applications. (NIH)

Link between integration of sex/gender and funding success:

- Likelihood of receiving funding when integration of sex and gender has been scored as a strength in the application. (CIHR)

European Commission (2015), Hunt et al. (2022), OWRH (2022), CIHR (2023)

MESSAGE plans to conduct a review of change in relation to sex and gender integration in 5 years' time

What data should funders collect to track impact of policy activities?

Slide 26 sets out **M&E metrics** for all funders wishing to be a part of a **review of sector-wide impact**.

Slide 28 sets out **additional M&E metrics** that funders may choose to collect data on to establish a **comprehensive picture** of how applicants and research projects consider sex and gender.

What systems should MESSAGE stakeholders establish to gather and monitor data cross-sectorally?

Slide 27 offers suggestions for how the research sector can jointly collect data.

Review these slides and come to PL4 prepared to share your thoughts.

There are five stages in the granting cycle where it would be valuable to collect M&E data

Stage	Metric
Application stage	To assess if an application has accounted for sex and/or gender
Review stage	To assess if reviewers consider and provide feedback on an application's consideration of sex and/or gender
Funding decision	To assess how consideration of sex and/or gender affects the likelihood of an applicant receiving funding
Progress reporting	To assess if researchers consider sex and/or gender as planned, as attested to in progress and final reporting forms
Research outputs	To assess if research papers report on sex and/or gender dimensions of the study

Over time, M&E priorities will shift from assessing the presence of *any* integration to *quality* integration

Year 1	Year 2	Years 3-4	Years 4-5	Year 6+
Funder milestones				
Implementation of funder sex and gender policies		Applications which do not account for sex/gender receive lower scores	Applications which do not account for sex/gender are not funded Applications which do not account for sex/gender in a high-quality way receive lower scores	Applications which do not account for sex/gender in a high-quality way are not funded
Monitoring and Evaluation				
Establish a baseline of how applicants account for sex/gender				5-year review: Whether and how applicants account for sex/gender
Monitor & evaluate if applicants account for sex and/or gender at all				
		Monitor & evaluate how applicants account for sex/gender to an unsatisfactory, satisfactory, or excellent standard		

5-year review: Metrics to track sector-wide impact for all funders

Stage	Metric	How?
Application stage	How many applications consider sex unsatisfactorily, satisfactorily, and excellently	Application box
Application stage	How many applications consider gender unsatisfactorily, satisfactorily, and excellently	Application box
Review stage	How many reviewers/committees provide feedback on the sex and gender component	Feedback form box
Funding decision	What proportion of successful applications consider sex and/or gender	Correlation - application data & funding data
Progress reporting	Proportion of male to female participants/subjects	Reporting form box
Progress reporting	Number/proportion of trans, non-binary and intersex participants	Reporting form box
Progress reporting	If sex/gender recruitment targets were met or not, and why	Reporting form box
Research outputs	What proportion of research publications from funded research account for sex and gender	Track using grant numbers

5-year review: What is the most useful system for gathering M&E data across the sector?

Option	Pros	Cons
Reporting directly to MESSAGE Medical Science Sex and Gender Equity	All funder (and organisation) types can feed in	Longevity not guaranteed
Reporting to amrc ASSOCIATION OF MEDICAL RESEARCH CHARITIES	Existing annual reporting systems	Government funders will need to capture data separately
Monitoring using third providers including grant management software and/or researchfish	Systems already in routine use Capture data on research outputs	Limited control of types of data collected

Other metrics for monitoring impact

Some organisations may want to collect additional data to track progress.
Consider the metrics set out below. Which metrics are missing? How else might we collect M&E data?

Stage	Metric	How?
Application stage	How many applications integrate sex/gender well	Application box (quant ranking)
Application stage	How many applications integrate sex/gender well	Application box (qual review)
Application stage	How many applicants attend training	Application form tick-box
Review stage	How many reviewers/committees provide quality feedback on the sex and gender component	Feedback form box
Review stage	How many reviewers/committee members attend training	Reviewer onboarding form
Funding decision	What proportion of the funded research portfolio accounts for sex and gender at the application stage	Correlation - application data & grant management data
Progress reporting	If sex- and/or gender-disaggregated analysis has been conducted	Reporting form box

Sustaining and growing success

We encourage MESSAGE stakeholders to share insights on overcoming implementation challenges

Over 2024, funders have flagged **challenges encountered in policy implementation**. Consider how these challenges below could be overcome, and **prepare to share your ideas during the Policy Lab**:

Raising awareness among, and providing training to, ***external* peer reviewers**

Including a question on sex/gender in the application form while **keeping forms short**

Monitoring **researcher compliance** after receipt of funding

Limited **staff capacity** to lead on policy roll-out

Limited guidance for **qualitative** research

Identifying **all the touchpoints, processes and policies** which need to be amended to reflect changes

Deciding how best to **communicate about policy changes**

Harmonising sex and gender policy activities with guidance for **other EDI characteristics**

Lack of clarity on how much these changes will cost, and how to **cover costs**

How can we keep the cross-sector conversation going?

The MESSAGE Policy Labs have brought together stakeholders from across the research sector into dialogue on sex and gender inclusion. **What would be useful for us to put in place to keep this group connected and best positioned to learn from each other's experiences?**

A group chat?

slack

Microsoft Teams

An email chain?

Outlook

A directory of contacts?

Future meetings?

Could you take the lead on this?

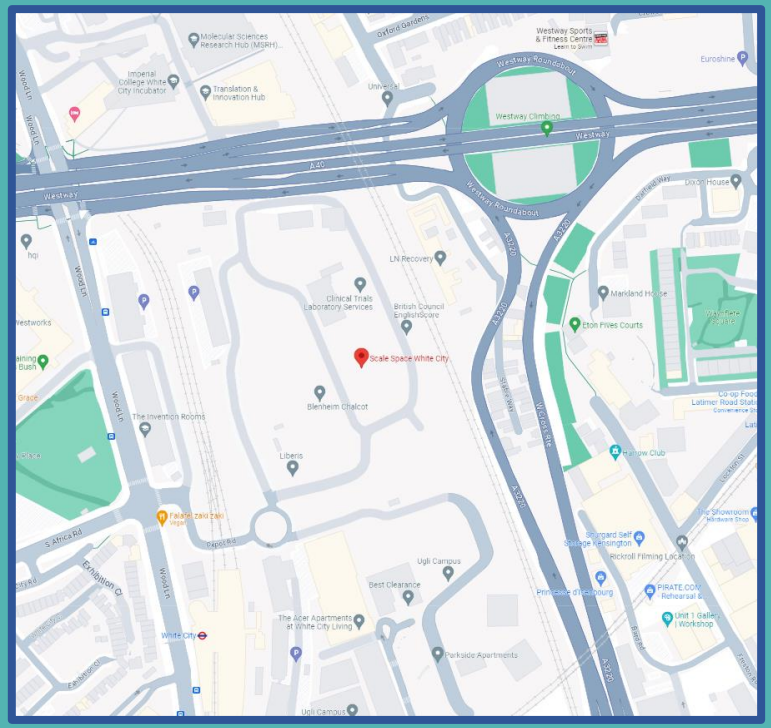
Can you provide funding to support future MESSAGE meetings?

What else have we not thought of?

MESSAGE Policy Lab 4

Tuesday 1st October 2023

Scale Space, 58 Wood Lane, White City, London, W12 7RZ
Link to Google Maps



Contact us:
Alice Witt (Research & Policy Fellow): awitt@georgeinstitute.org.uk
MESSAGE project team: MESSAGE@georgeinstitute.org.uk

Find out more:
Twitter: @MESSAGE_TGI
MESSAGE website: www.messageproject.co.uk

Contributors to this briefing pack:

Alice Witt, Celestine Donovan-Bradley, Ross Pow, Catriona Manville, Kate Womersley.
Design by Anshu Manchanda.