

Building a Collaborative Culture in ePIC

Professional Conduct and Collaboration
Culture Training



CREATED BY THE COLLABORATION CULTURE COMMITTEE



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VIRTUE¹

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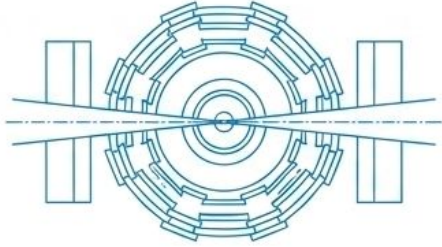


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The ePIC mission: why are we here?



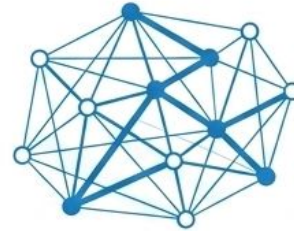
Build and run state-of-the-art detector



Do science



Foster the careers of (especially younger) scientists



Benefit fully from the scientific insights of all our collaborators

Engineering the ePIC Community



We are an international collaboration, and that means we have collaborators coming from a wide variety of cultural backgrounds with correspondingly varied experiences and experiences concerning personal interactions.

We need to establish an ePIC culture that supports our goals.

Behavioral Expectations & Our Culture

The purpose of this training

- To lay out a **clear set of behavioral expectations** that will help us accomplish our shared goals.

We are building an environment that is:

- ✓ Collaborative and supportive
- ✗ NOT hostile
- ✗ NOT demeaning
- ✗ NOT exclusionary



Expectations

The ePIC North Star: the Culture Code

Statement of values

The **ePIC Collaboration** is a **diverse international scientific community** working collectively to design, construct, commission and operate the ePIC detector to exploit the physics potential of the Electron-Ion Collider. The **success** of the ePIC Collaboration relies on **contributions from all members**. Therefore, the ePIC Collaboration strives to provide a welcoming, accessible, safe, and supportive environment free from all forms of discrimination, harassment, and retaliation, where all collaborators representing various cultures and identities are fully included, respected and able to contribute their best work. Sustaining such a peaceful professional environment is the responsibility of all collaboration members.

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Upholding ePIC community values:

Scope of Application



When are you expected to uphold ePIC community values?

Whenever an interaction would not happen without ePIC

Collaboration meetings, including social gatherings at these events

Meetings and conferences where one is representing or perceived to represent ePIC, including social events at these meetings



When does it not generally apply?

The rest of your life, such as:

Your Facebook feed

Your outside political events

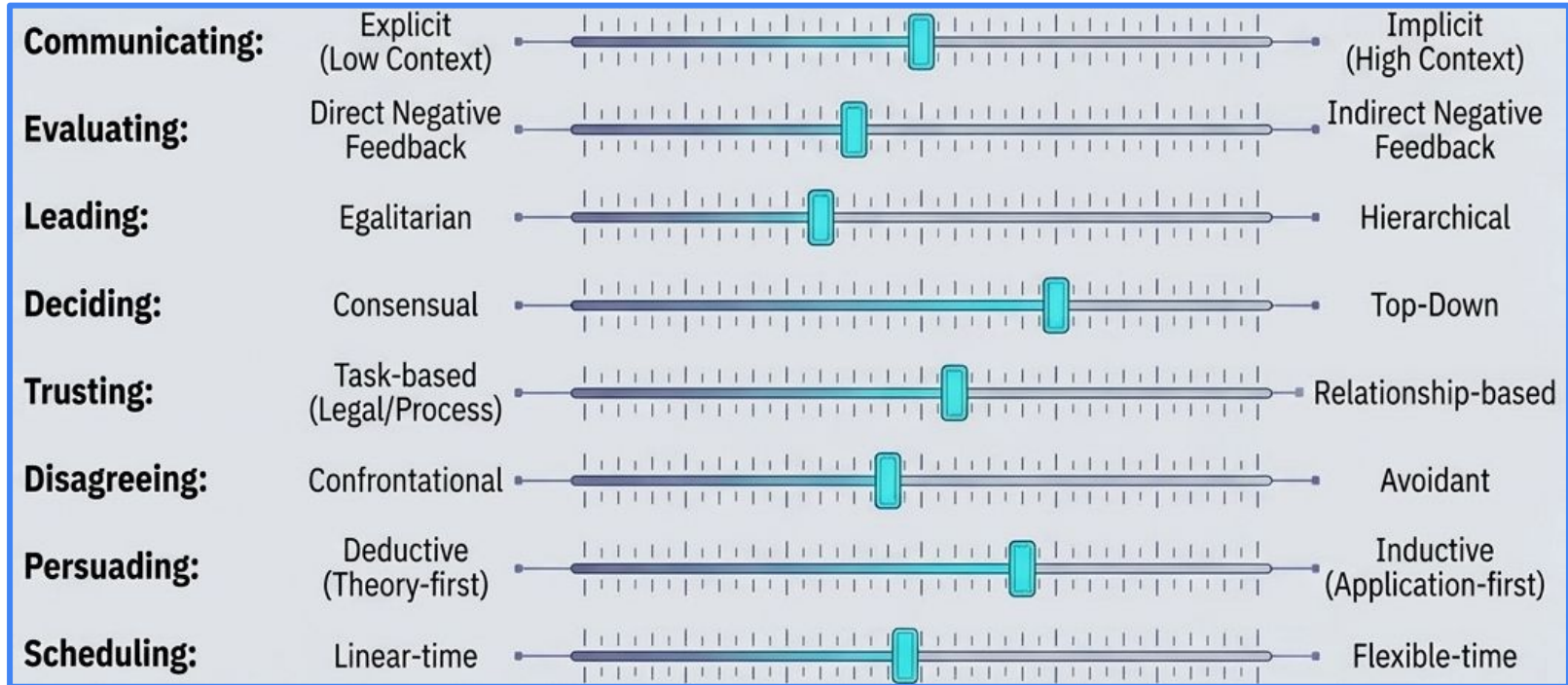


Important Note: This does not mean that such activities have no consequences in ePIC!

Mapping Cultural Topography

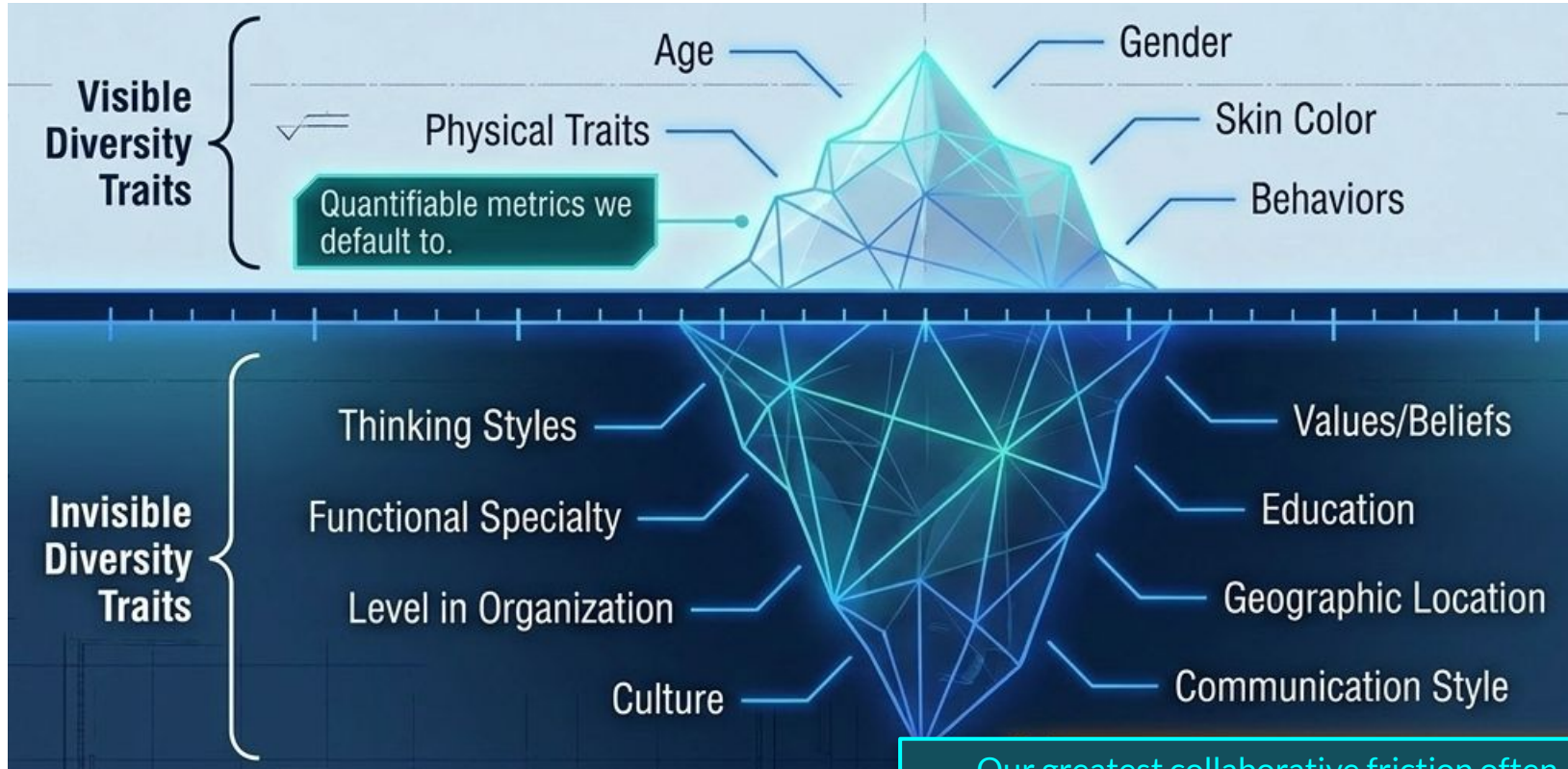
Diagnosing cross-cultural friction

Intentionally offensive behaviour is rare, but unintended clashes are highly probable due to cultural differences.



Framework: Erin Meyer's 8 Culture Map Scales

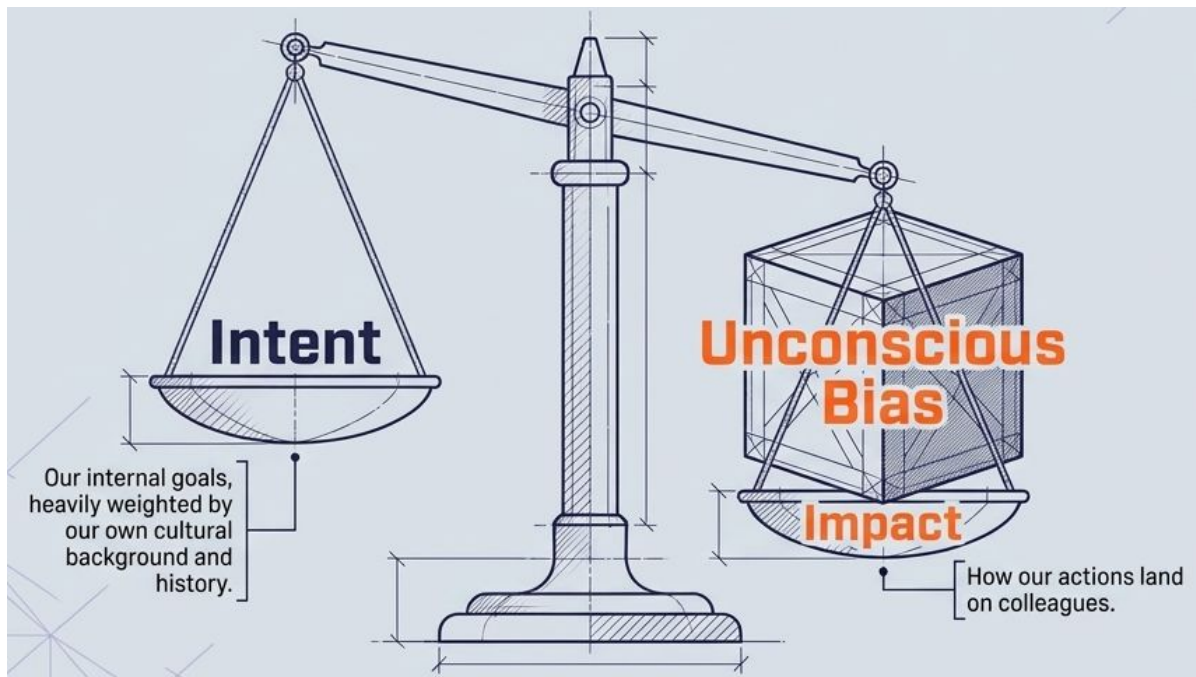
The complexity of a Collaboration



Our greatest collaborative friction often comes from the variables we cannot instantly see or quantify

The imbalance of intent vs impact

Unconscious bias acts as a systemic error in human judgement: automatic, unintended, but highly impactful



Core principles:

1. We will all make mistakes.
2. We all must try to do better.
3. When called out, the expected professional response is to apologize, rather than justifying the intent and becoming defensive.

The imbalance of intent vs impact

“He constantly made me feel bad about myself, to question my potential and in due course of time develop a deep fear of not angering him even if it meant resorting to lying sometimes.”

“I never had the courage to discuss this while I was a graduate student because I was scared about the repercussions (still scared).”

“Everytime I see one of the slashed posters, my stomach knots with fear and disappointment.”

“I am in a mode where I want to just survive and somehow manage. Fighting the system and people took a lot of my energy, time and pretty much nothing came out of it. I am actually a bit scared even going public now. I haven’t yet recovered from my last reporting and discussions and everything that came out of it.”

The SPACE2 cognitive model

Six actionable strategies to manage unconscious bias and foster inclusion within collaborative teams



Slowing Down

Being mindful and considered in your responses to others.



Perspective Taking

Actively imagining the thoughts and feelings of others.



Asking Yourself

Active self-questioning to challenge your assumptions.



Cultural Intelligence

Interpreting a person's behaviour through their cultural lens rather than your own.



Exemplars

Identifying counter-stereotypical individuals.



Expand

The formation of diverse friendships and networks.

The pillars of professional behaviour



Respect

Practice mindful communication and cultural sensitivity. Value differing opinions, avoid comments on physical appearance (even well-intentioned), and confirm consent before any physical contact.



Teamwork

Share ideas, data, and resources openly. Give proper credit for original work, listen actively to ensure everyone has a chance to contribute, and remain open to constructive criticism.



Integrity

Uphold the scientific method with transparency. Follow local safety rules, report conflicts of interest promptly, and safeguard internal collaboration data.

Your rights and responsibilities

The right to a safe environment:
Everyone in ePIC should be given the opportunity to do their best work.



The responsibility to intervene

- Intervene when you see a problematic behavior



The responsibility to grow:

If your behavior is addressed:

- Accept constructive criticism gracefully
- Strive to do better

Impact supersedes intent

Goals of this session

This session is designed to give you the ePIC toolbox, practical tools to:



Recognize

Know clearly what is **acceptable** and **unacceptable** behavior in ePIC.



Intervene

Gain the confidence and methods to **step in** when you witness issues.



Report

Know exactly **where to go** to report issues and **how to do it** effectively.



Overview of the training



Part 1: Introductory lecture

Today's session

Focuses on core behavioral expectations, the Collaboration Culture Committee (CCC) roadmap, and foundational collaboration concepts



Part 2: Interactive Case Studies

Coming months (Small groups)

Dedicated virtual breakout sessions focusing on real-world, anonymized physics collaboration incidents. Highly interactive group dialogue.



Attendance & Completion Rule

Attending Today

Your attendance today will count as completion of Part 1, based on the honor system. You will only need to complete Part 2 later on.

Missing Today

You will be required to take the full, combined training (Introductory Lecture + Interactive Case Studies) later on

Introductory lecture

Defining Unacceptable Behavior

ePIC best practices and procedures

Addressing Culture Code Violations



Defining Unacceptable Behavior

Understanding what constitutes exclusion,
harassment, and discrimination.

Slurs

Slur: an insulting or disparaging remark or innuendo

Common slurs are racial/ethnic, gender-related, or refer to sexuality.

Some terms may be situational.

When in doubt, don't say it!

It is unacceptable to use slurs, in any language, for any group, in ePIC

Gender and Sexuality terms (1/2)

It is unacceptable to single out anyone for their gender identity or sexuality in ePIC

Sex - either of the two major forms of individuals that occur in many species and that are distinguished respectively as female or male especially on the basis of their reproductive organs and structures

Sexual orientations - a multidimensional concept that describes an individual's sexual, emotional and/or romantic attraction

- STRAIGHT - people who are attracted to people of the opposite gender
- HOMOSEXUAL - people who are attracted to people of the same gender
- BISEXUAL - people who are attracted to two opposite genders
- PANSEXUAL - people who are attracted to all genders
- LESBIAN - a homosexual woman
- GAY - a homosexual person, most often a man



Gender and Sexuality terms (2/2)

Gender - the behavioral, cultural, or psychological traits typically associated with one sex

Gender identity - a person's internal sense of being male, female, some combination of male and female, or neither male nor female

- TRANSGENDER - of, relating to, or being a person whose gender identity differs from the sex the person had or was identified as having at birth
- CISGENDER - of, relating to, or being a person whose gender identity corresponds with the sex the person had or was identified as having at birth
- QUEER - a: a person who is gay, lesbian, bisexual, pansexual, or otherwise not heterosexual b: a person whose gender identity is nonbinary or differs from the sex they had or were identified as having at birth : a genderqueer or transgender person : a person who is not cisgender
"While the noun queer is used as a neutral or positive self-descriptor, it has a long history of pejorative use and is likely to be considered offensive when used by someone who does not identify as queer."
- LGBTQ - Lesbian Gay Bisexual Transgender Queer



Bullying



Bullying - abuse and mistreatment of someone, often by someone stronger, more powerful, etc.

Takes many forms:

- Abuse of bureaucratic processes (e.g., paper approval)
- Excessive criticism of professional groups (e.g., working groups or other collaborations)
- Dismissing or silencing people in meetings, including by talking over them
- Aggressive criticism, especially repeated (see: harassment)
- Creating structural barriers to someone's work

It is unacceptable to bully others in ePIC

Harassment

Harassment - to create an unpleasant or hostile situation for someone by uninvited and unwelcome verbal or physical conduct

Sexual harassment - uninvited and unwelcome verbal or physical behavior of a sexual nature especially by a person in authority toward a subordinate (such as an employee or student)

Gender harassment - a broad range of verbal and nonverbal behaviors not aimed at sexual cooperation but that convey insulting, hostile, and degrading attitudes about members of one gender

Examples

- Armed guard at a national lab pulls over a graduate student to ask her out.
- Colleague tells a collaborator she is not doing her job because she is taking breaks every 2-3 hours to express milk.

Harassment is frequently marked by repeated unwanted behavior, but an individual severe incident may be harassment.

Harassment of any type is unacceptable in ePIC. It need not be sexual harassment or related to someone's identity

Conflicts of Interest

Conflicts of interest - a conflict between the private interests and the official responsibilities of a person in a position of trust



Examples:

- Reviewing the work of your significant other
- Refereeing a paper by a close colleague (e.g., journals require referees to be from a different institution from the authors and have no recent publications with them)
- Serving in a role where you influence whether someone competing with you for a job gets an award

In ePIC, if you have a conflict of interest, or something which may give the *appearance* of a conflict of interest, you must either recuse yourself or disclose the conflict and let others decide the appropriate remedy.

Romantic relationships

- Romantic relationships between collaborators are not forbidden. Consider consequences carefully.
- Repeatedly asking a collaborator out when they repeatedly say no is a form of harassment.
- Be aware of possible power differentials. Consensual relationships may still be coercive.
 - Romantic relationships with large power differentials are discouraged.
 - Possible power differentials: convener, shift leader, run coordinator
- Romantic relationships generate a conflict of interest in many cases.
- Romantic relationships can affect other members of the collaboration besides the people directly involved. The appearance of favoritism can be demoralizing.
- **Should a romantic relationship arise, the collaborators must recuse themselves from decisions involving the other party. Disclosure is strongly encouraged.**

Jokes, profanity, and vulgar language

Jokes are OK in ePIC!

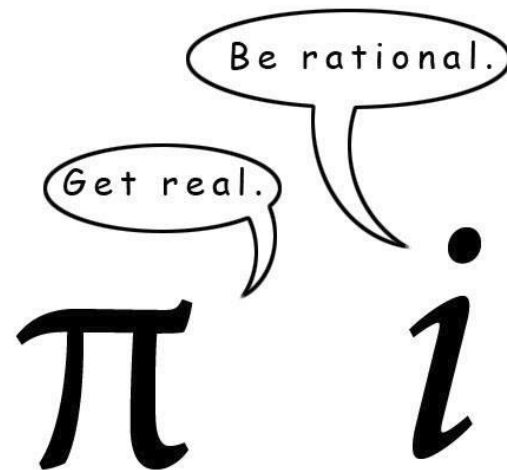
...BUT...

- Do consider the impact of jokes on bystanders.
- Jokes which make fun of people are generally NOT OK.
- Jokes are difficult to translate - beware of possible miscommunication.
- Vulgar jokes or comments are generally NOT OK.
- Profanity is discouraged.

Examples:

- Supervisor talking to subordinate about pornography
- Students who do not know each other well share a ride to a conference and the driver plays a vulgar comedy show

Cultural norms around profanity and vulgar language vary. The goal is for every collaborator to be comfortable.



Mistranslation and Misunderstanding

A non-native English speaker may occasionally use abbreviations or sayings which may be misinterpreted, or slurs, which may be offensive or embarrassing to the collaborator.

Native English speakers may also say or do things that make non-native English speakers uncomfortable.

A first offense, if inadvertent, will not result in sanctions.

Everyone has a duty to discreetly and respectfully explain the issue to the collaborator so that they can do better. If there is a power differential that makes this uncomfortable, they may ask a more senior colleague to speak to the colleague instead.



Items from the Spokesperson

Introduction and news

Endorsements: (2/3 majority of the Votes Cast)

- PWG Conveners

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

- Extension of mandates to December 31, 2021

[REDACTED]
[REDACTED]
[REDACTED]

- New Institute: (2/3 majority of the Eligible Voting Members)

Member Institute: [REDACTED]
Team leader: Ass. Prof. [REDACTED]

Physical Touching

You may not generally* touch collaborators without their consent.

Handshakes are generally acceptable. You may assume consent unless otherwise indicated.

Hugs and greeting collaborators with kisses are acceptable by mutual agreement. When in doubt, just ask.



*Examples of **exceptions**: If a collaborator is having a medical emergency and you know CPR, you may touch them without prior consent. You may touch a collaborator without prior consent to prevent them from hurting themselves or others. You may greet a friend with a hug if this is your usual way of greeting each other.

Comments on people's bodies

Many people are uncomfortable with with comments (positive or negative) on their bodies.

Such comments can lead to the perception that your colleagues do not value you for your intellectual abilities.

Comments can easily cross the line into sexual harassment.

Examples:

- Senior prof to post doc: “---, I’m going to tell you this for your own good. You really need to lose 10 or 15 pounds.”
- Supervisor to supervisee: “I like your hair better straight. You much prettier that way.”

The tone and context matter a lot.

When in doubt, don't say it.



Acceptable compliment:
That's a nice dress, Alice & Jane!

People's reproductive choices

It is not appropriate to make judgemental comments about the number of children people have or “should” have.

Examples:

- “If she cared so much about her career she wouldn’t have kids.”
- “She was doing well until she had kids.”
- “You should have kids.”

Generally you should let people volunteer details about their family rather than asking.



Implicit bias

Implicit bias - a bias or prejudice that is present but not consciously held or recognized

You can take an [Implicit Bias Association Test](#)

Everyone - including people from underrepresented groups - can hold biases against them

Collective bias examples (research based):

- Everyone evaluates identical resumes with a male/"white" name as more qualified
- People shift criteria for faculty position if a female/non-white candidate is more qualified than male/white candidates

Need awareness and structures designed to combat it

Not to be confused with *explicit* bias. Explicit: fully revealed or expressed without vagueness, implication, or ambiguity: leaving no question as to meaning or intent



Subtle acts of exclusion

Also called [microaggression](#) - comment or action that subtly and often unconsciously or unintentionally expresses a prejudiced attitude toward a member of a marginalized group (such as a racial minority)

Examples:

- Woman makes a suggestion and it is ignored. Man makes the same suggestion and it is praised.
- Physics department has a “faculty men’s” bathroom. There is no faculty women’s bathroom.
- Lack of gender-neutral bathrooms or dormitories
- No lactation rooms or in inaccessible locations

Experiences of minoritized groups

Imposter syndrome - a psychological condition that is characterized by persistent doubt concerning one's abilities or accomplishments accompanied by the fear of being exposed as a fraud despite evidence of one's ongoing success

Most people feel this sometimes, but on average members of minoritized groups feel it more.

Discriminatory gaslighting - treating minoritized groups as if their complaints are unfounded. Contributes to imposter syndrome.

Examples:

- You just got ___ because you are ___. (*No, you also had to be qualified!*)
- --- is an equal opportunity jerk. (*Probably not - but even if he is, so what?!*)

Things not otherwise mentioned

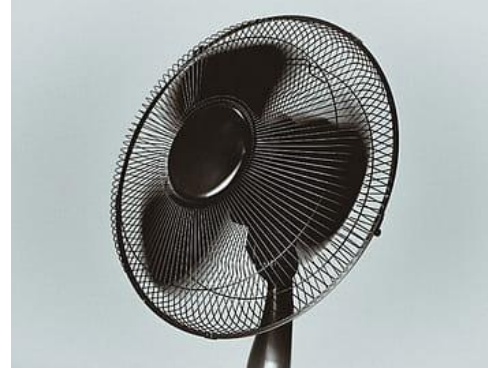
Just because it's hard to categorize doesn't mean it's OK.

If a behavior prevents a colleague from doing their best work, it's not OK.

No loopholes.

Examples:

- Student liked having a fan on in the office but did not like having it on him directly, so he turned it on another student.
- Supervisor would come up to supervisee when she was drinking something, like a coffee or a beer, and drink out of her cup/bottle.



Retaliation

Retaliate - to return like for like; especially to get revenge

Retaliation for a report made in good faith, even if there are no sanctions in response or no fault is found, is unacceptable.

Examples of retaliation:

- Someone who left a group after harassment was said to not be a “Team Player” because they left the group and therefore not considered for a leadership position
- Calling someone a prude for complaining about a video with a topless woman





ePIC best practices and procedures

Collective responsibility: Active Bystander Intervention

The ePIC standard: The culture of the collaboration is defined strictly by what we tolerate in our spaces.

The Passive Bystander	The Active Ally
Observes marginalization, assumes someone else will handle it, fears awkwardness, allows the behavior to normalize.	Takes immediate, proportionate action against discrimination. Uses personal privilege and institutional capital to protect marginalized collaborators and disrupt harmful dynamics in real-time.

Key principle: Sustaining our environment is a shared operational duty. You do not need formal authority to intervene; your presence in the room is your mandate to protect ePIC values.

Collective responsibility: Active Bystander Intervention

All collaborators are encouraged to intervene when they see problematic behavior or a violation of the ePIC values, **or report** this to someone for later action.

It's not necessarily needed to confront the initiator in the moment.

People in leadership roles are required to intervene or act and failure to intervene or act repeatedly or in unambiguous situations can result in sanctions, such as losing one's leadership roles or being barred from leadership roles.

Faculty and those in permanent positions are de facto leaders.

Collective responsibility:

Respect for Procedures

- **Respect for others** includes following our agreed-upon collaboration procedures.
- Please submit **abstracts and slides** in time for internal review to allow colleagues to provide meaningful feedback.
- Give appropriate credit to the work of others, **cite prior work accurately**, and respect intellectual ownership of ideas, methods and results.
- Sustaining a professional and productive environment is the **responsibility of every member**.

Suggested procedures for meetings

- ★ **Record public meetings** (e.g. collaboration meetings, general meetings, TWG meetings, detector subsystem meetings, software/computing meetings, etc):
 - This is an accessibility issue! Not all of our collaborators are available during these days/times and many are in distant time zones.
 - Making sure everyone can stay informed, even if they can't attend in real time (or in person) is a key part of being a welcoming and inclusive collaboration.
 - It can also help jog people's memories if there's further questions after the fact about a specific point.

Suggested procedures for in-person meetings

★ Name tags

- Use participants' preferred name, regardless of legal name
- Titles: Dr. and Prof. must be used equally for men and women. Women must have the option of using Ms.
- Pronoun stickers should be available

★ Meeting rooms and bathrooms should be easily **accessible** to people with physical disabilities

★ Organizers should identify at least two people whom harassment and bullying can be reported to

★ Meeting should include regular **reminders of Statement of Values**

Suggested procedures for in-person meetings

While we aim for maximum inclusivity, these guidelines represent ideal standards to be pursued as far as local infrastructure allows.

★ Bathrooms

- Identify gender-neutral bathrooms, which must be within a 2 minute walk of the main meeting room(s)
- Stalls in men's rooms must have trash cans
- Closed stalls

★ Lactation:

- A private, discreet site for lactation should be identified, for use upon request.
A refrigerator and a sink must be available in or near this site

★ Childcare: Organizers should indicate how participants can find temporary child care and child-friendly lodging in the area



Addressing Culture Code Violations

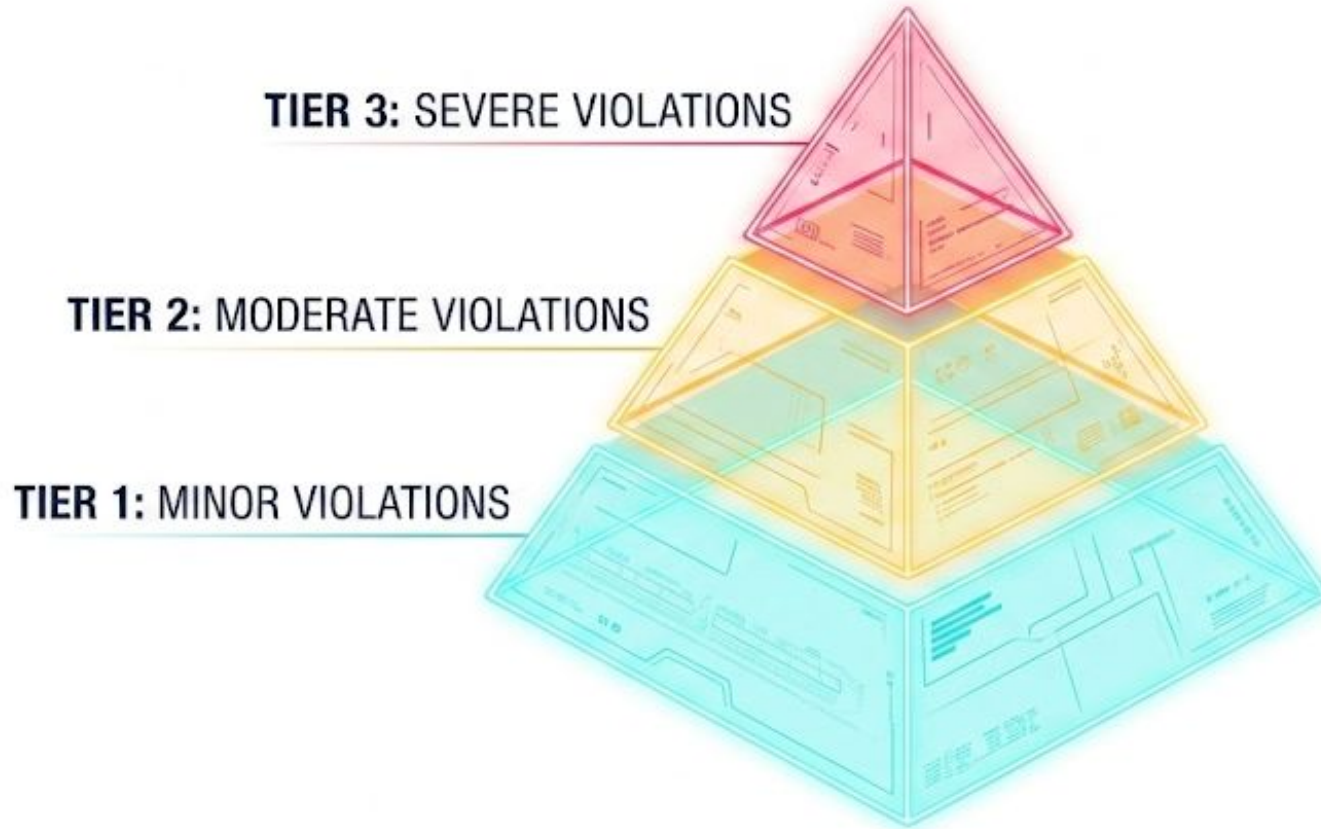
Upholding our standards through clear, fair, and documented
processes.

Where to report violations



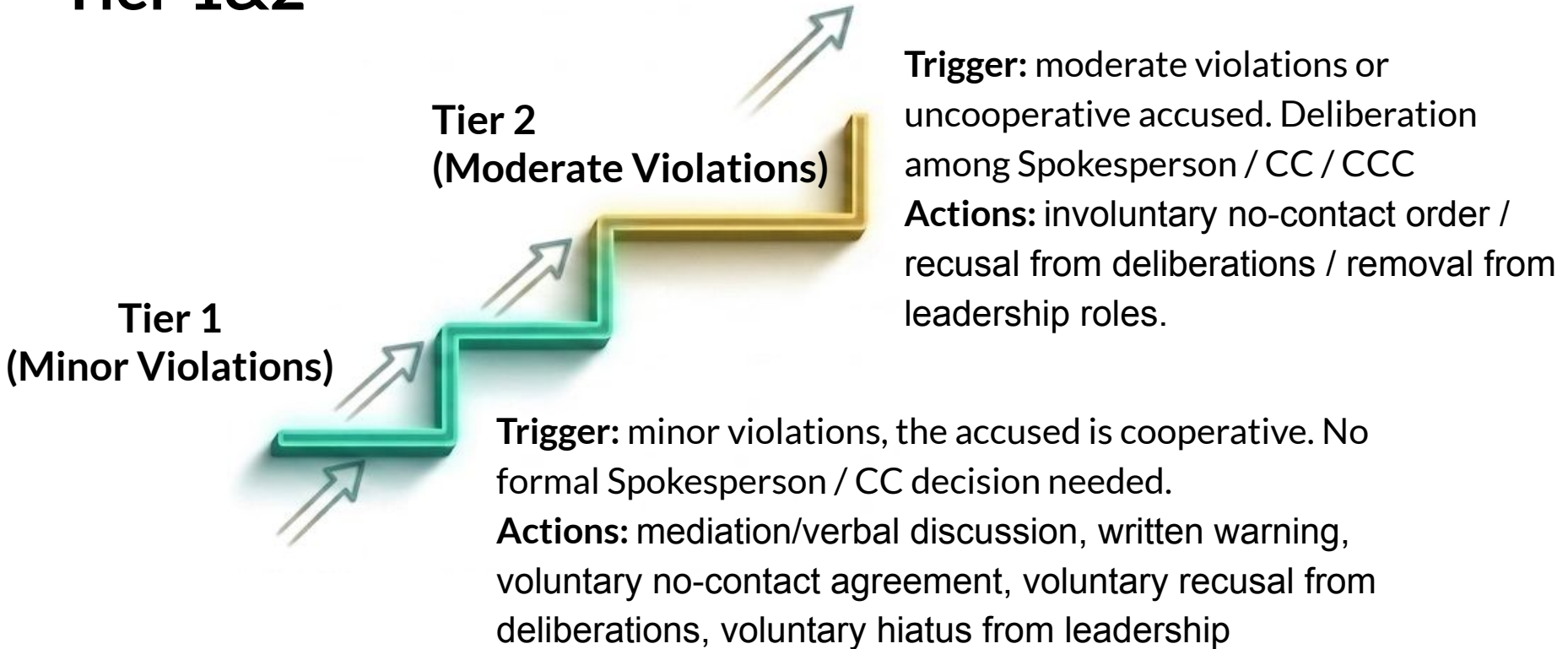
Note: All reports are handled prioritizing a safe or retaliatory-free process.

The 3-Tier Grievance Procedure



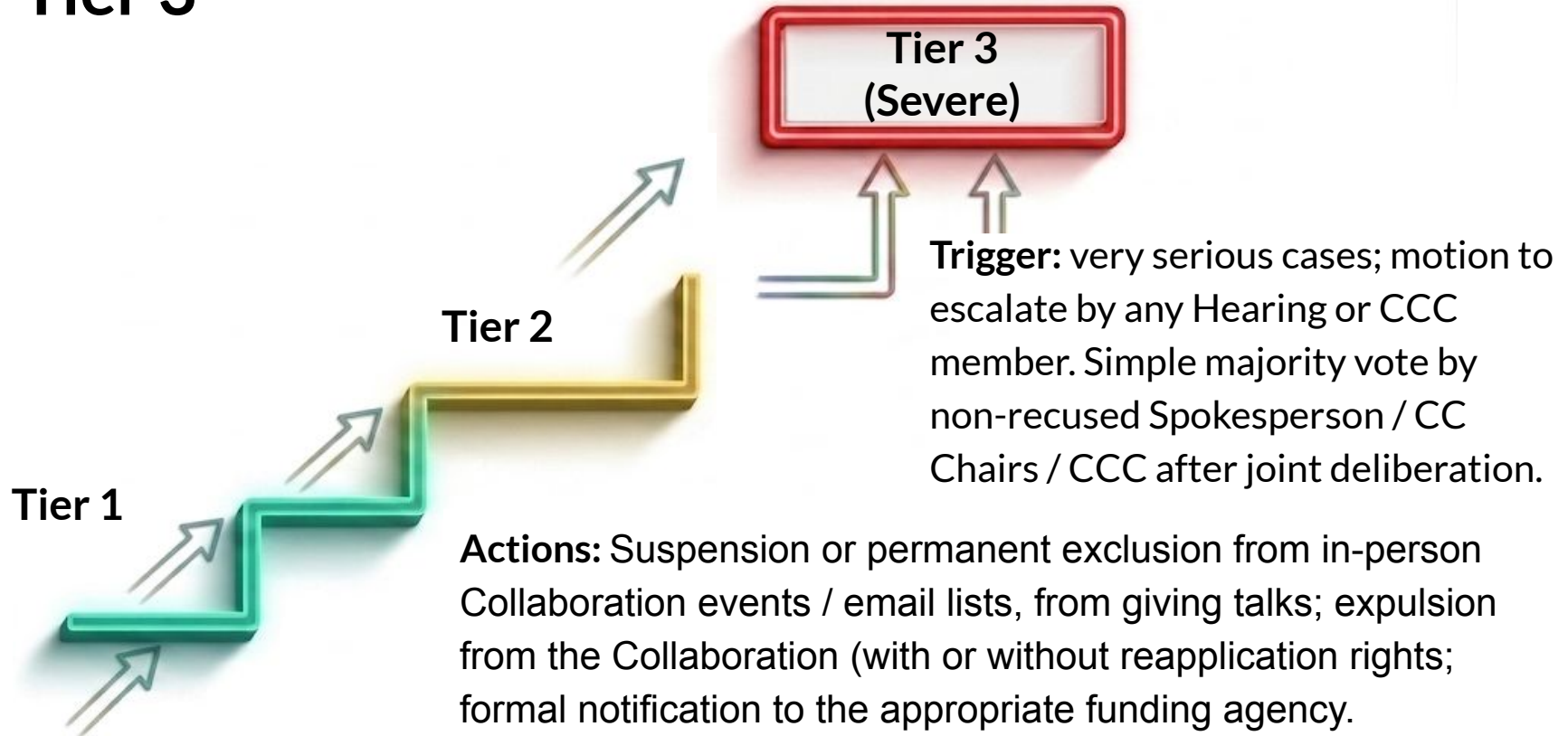
The 3-Tier Grievance Procedure:

Tier 1&2

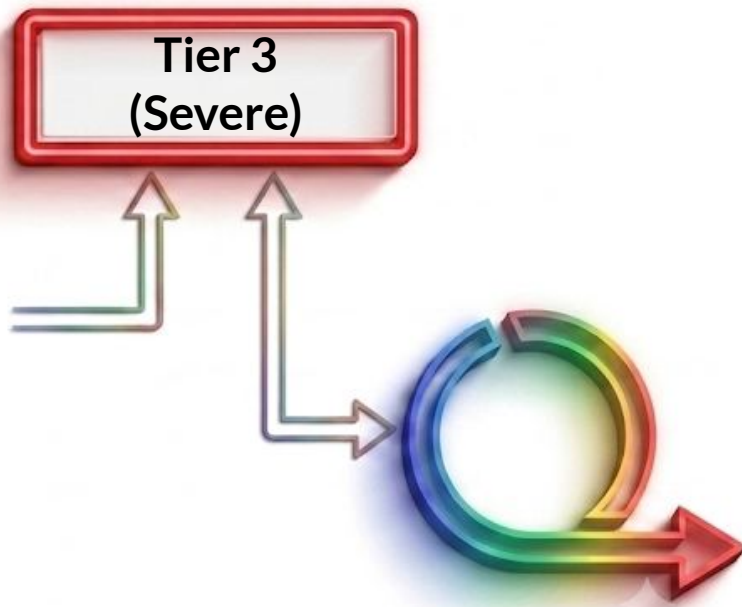


The 3-Tier Grievance Procedure:

Tier 3



The 3-Tier Grievance Procedure: The Appeal Process



The Appeal Process

Appeals submitted to: CCC and CC Chairs.

Requirements: Must contain new evidence/information or proof of procedural flaw in the original process, and case not previously reviewed.

Mechanism: 3-member CC ad-hoc committee (review board) evaluates the case & meets the appellant (recusals allowed for bias). It recommends to uphold, alter, or propose a CC majority vote to repeal the sanction.



You cannot get through a
single day without having an
impact on the world around
you. What you do makes a
difference, and you have to
decide what kind of difference
you want to make.

— Jane Goodall

References & Acknowledgements

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