

Inclusive Excellence Plan (2026 – 2028)

AO Foundation

Document Name (abbreviation)	Inclusive Excellence Plan (IEP)
Version	IEP_1.0
Approved by the full Executive Committee	April 2026
Effective from	1 st of June 2026
Owner	Human Resources, Sr HR BP
Affected documents	Inclusive Excellence Policy Switzerland and Inclusive Excellence Policy of regional offices, Remote working for AO Employees Switzerland, Compensation Policy (AO-wide policy)

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1. Introduction

In early 2024, the AO Foundation Executive Committee mandated Human Resources to develop a long-term Diversity, Equity, Inclusion and Accessibility (DEIA) initiative: *Inclusive Excellence at the AO Foundation*. This initiative reflects the organization's commitment to strengthening an inclusive and supportive work environment.

Its implementation is led by a dedicated Project Lead and supported by the Inclusive Excellence Focus Group (hereafter IIEFG). The IIEFG is a voluntary, multidisciplinary, diverse group of employees from different departments and regions that was established in early 2024. It initiates, manages and implements DEIA initiatives and projects across the AO that aim to foster an environment in which all employees have equal opportunities to succeed in their work, regardless of their function, background, identity, beliefs, or disability.

Within the broader European context, gender equity has become both a core value and a strategic priority ([Ref 1](#)). Switzerland reinforced this commitment with the adoption of its first National Gender Equality Strategy 2030 in 2021, promoting equal participation of women and men across all areas of life ([Ref 2](#)). Gender equity is now recognized as a driver of excellence in industry and academic sectors, supporting talent attraction, and retention, and strengthening the quality of scientific and innovation outcomes.

Despite demonstrable progress toward gender parity in the European territories over recent years, significant disparities remain. The EU emphasizes that achieving gender equality goals requires structural transformation across a company's systems. This transformation involves research institutions, industries, funders, national authorities, and the EU itself. This perspective recognizes that piecemeal efforts are insufficient and that institutional change must be embedded at every level to overcome entrenched biases and barriers. Therefore, this Inclusive Excellence Plan includes actions for all AO employees of the AO Foundation, but the data shown in this document are only based on Gender Equity mandatory EU Horizon requirements ([Ref 3](#)).

Several EU policies and funding programs, including the flagship research and innovation program Horizon Europe, have been mobilized to promote gender equity. This means embedding Gender Equality through key mechanisms such as 1) mandatory Gender Equality requirements for funding eligibility, 2) integration of sex and gender dimensions in research content, and 3) targets for gender balance in decision-making bodies and research teams.

The AO Foundation is committed to advancing gender equity across its operations with a specific focus on inclusive leadership, equitable career development, and a respectful work environment. Through this Inclusive Excellence Plan, we **combine our internal**

DEIA efforts with external frameworks such as Horizon Europe’s gender equality mandates, ensuring a unified and integrated approach. Covering the period 2026–2028, the plan outlines the key priorities and next steps and goals.

2. Scope

This Inclusive Excellence Plan includes the ongoing objectives of our long-term Inclusive Excellence initiative combined with the requirements by the EU on Gender Equity, specifically in research.

The Inclusive Excellence goals and objectives, established in early 2024, **are clustered under these three key pillars**: (see roadmap 2024-2026 in [Annex I](#) and [objectives](#)).

- **Awareness**
- **Education**
- **Policies and Practices**

In addition, this Inclusive Excellence Plan includes the four mandatory Horizon Europe [eligibility requirements](#):

1. Public document

- a) Publication of the Inclusive Excellence Plan on the AO website, approved or signed by senior management.
- b) Active communication across the organization and publication of annual progress reports on the AO website.

2. Dedicated resources

- a) Assign dedicated resources and expertise to ensure an ongoing, sustainable organizational change in gender equity.

3. Data collection and monitoring

- a) Selection, analysis, publishing and monitoring of data on an annual basis to define objectives and enable ongoing evaluation of the progress.

4. Training

- a) Offer long-term awareness-raising and training activities on gender equality to all AO employees.

3. Resources and Roadmap

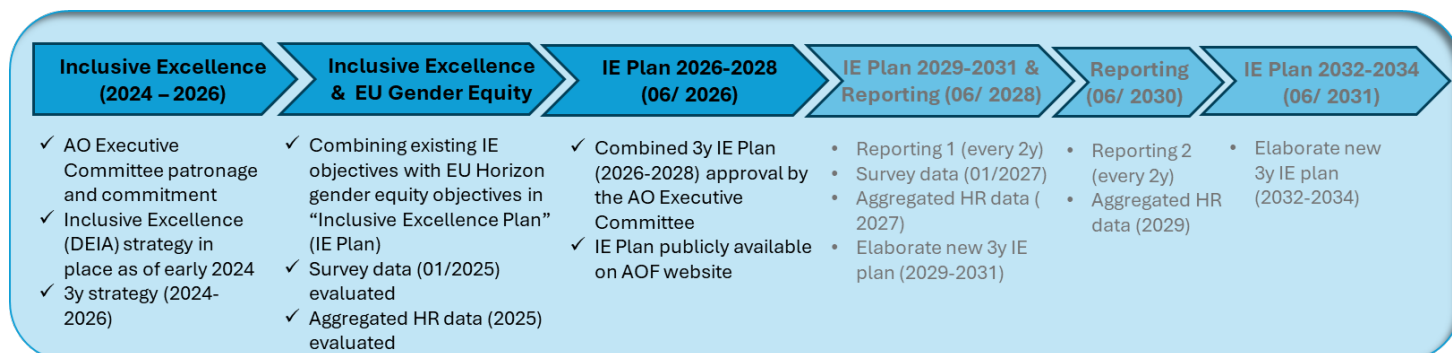
3.1. Resources and budget allocation

Composition of the Inclusive Excellence Focus Group:

IE & GE Focus Group	♂	♀
Project Lead		Bettina Brühlmann (CH)
Reporting	Marco Minoia (CH)	Monica Ghidinelli (CH) Athina Chatzigeorgiou (CH)
Members	Stefano Crespan (CH) Dino Nuzzo (CH)	Sêgbé Pritchett (CH) Tatjana Topalovic (CH) Maja Vidovic (CH) Isabella Wong (CN-HK) Paola Morales (COL) Idaura Lobo (BR) Carla Vinize (BR)

A dedicated budget for targeted measures, such as work-life balance initiatives, staff training, and professional development, has been allocated annually (HR budget) as of 2026 to further advance the Foundation’s commitment to our Inclusive Excellence & Gender Equity Initiative.

3.2. Roadmap and reporting



The IIEFG will monitor and report on diversity and gender distribution by collecting employee data on an annual basis and preparing a comparative analysis **every two years**. In addition, periodic Employee Surveys and/or pulse surveys -incorporating questions on gender and equal opportunity - will be conducted to further evaluate progress and identify areas for new objectives.

4. Strategic initiatives - DEIA

4.1. Definition of terms

Diversity: Refers to the presence of differences within a given setting, including race, ethnicity, gender, age, sexual orientation, disability, education, and other characteristics. In the workplace, diversity means having a workforce that represents a wide range of backgrounds and perspectives.

Equity: Focuses on fair treatment and ensuring that all employees have access to the same opportunities. Equity addresses systemic inequalities and seeks to provide support and resources tailored to individuals' needs to ensure a level playing field, rather than assuming everyone benefits equally from the same conditions.

Inclusion: Involves creating a culture where all individuals feel welcomed, respected, supported, and valued. An inclusive workplace encourages participation and embraces the unique contributions of each employee, ensuring that everyone can fully engage and thrive.

Accessibility: Ensures that physical spaces, technology, and systems are designed or adapted to be usable by people of all abilities. This principle removes barriers for individuals with disabilities and promotes equal access to all aspects of the workplace, from recruitment to daily operations.

4.2. Identify and review existing measures

1) Inclusive Excellence Policy

A new **IE Policy** was implemented in Switzerland on February 1, 2025. The IE Policy in the regional offices was implemented on January 1, 2026. We are aligning our AO-wide initiatives with the AO Research Institute and their [Gender Equity Plan of the AO Research Institute \(ARI\)](#) and we collaborate closely with [AO Access](#). AO Access came into force in 2018 to create transparency and awareness, and to assess whether bias and/or barriers exist for entry and/or progression of women and other underrepresented minorities in the AO with a focus on the external world-wide community of the AO (faculty, officers, leading surgeons).

The AO has offered an **Employee Assistance Program (EAP)** in Switzerland since October 2024 and extended it to all regional offices in April 2026. The EAP is an external professional consultation and support service that provides confidential assistance and expert information to employees facing personal or work-related challenges. It also serves as an anonymous point of contact in cases of harassment and is an integral component of the IE Policy.

2) Benefits at the AO

The AO supports employees through flexible working arrangements related to working hours and work location, including working from home, as outlined in our employee policies and guidelines.

In 2025, this commitment was further strengthened through the introduction of the Remote Working for AO Employees in Switzerland policy, which expanded existing arrangements to include working from abroad within the EU for a defined period each year, while ensuring compliance with applicable social security and legal requirements.

3) People Development: Training & Development, Employee Survey, People & Development Compass

In 2024, the AO Foundation established the People Development working group to strengthen employee development, training, and career progression. The group developed a Training and Development Framework, a skills training catalogue, and a policy supporting continuous learning.

An organization-wide employee survey was introduced to assess workplace experience, including gender equity aspects. The survey, conducted in January 2025, supported the AO Foundation's accreditation as a *Great Place to Work* (see section 4.4. for more details). Based on the survey findings, a revised performance appraisal process - the *People and Development Compass* - was approved by the AO Executive Committee and implemented in 2025. The process promotes structured dialogue on performance, development, and career progression, ensuring equal opportunities for all employees.

4) Compensation Policy

In 2025, the AO Foundation reviewed and updated its Compensation Policy to strengthen transparency, fairness, and organizational trust. This initiative, endorsed by the AO Executive Committee, included the alignment and internal communication of compensation levels across the organization.

The revised compensation policy and standardized job level structure were communicated organization-wide in January 2026. The review was informed by external market data and supported by Mercer, which assisted in mapping the organization and defining market-aligned salary ranges.

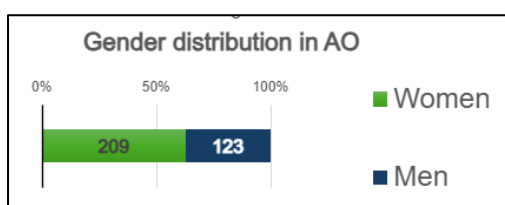
4.3. Collection of gender-disaggregated data (Human resources data)

The gender-disaggregated data cover different aspects of the gender distribution within the scope of this analysis as of January 1, 2025. The scope includes:

- all employees in Switzerland;
- excludes the AO Research Institute (ARI), which has its own Gender Equity Plan; and
- excludes the regional offices.

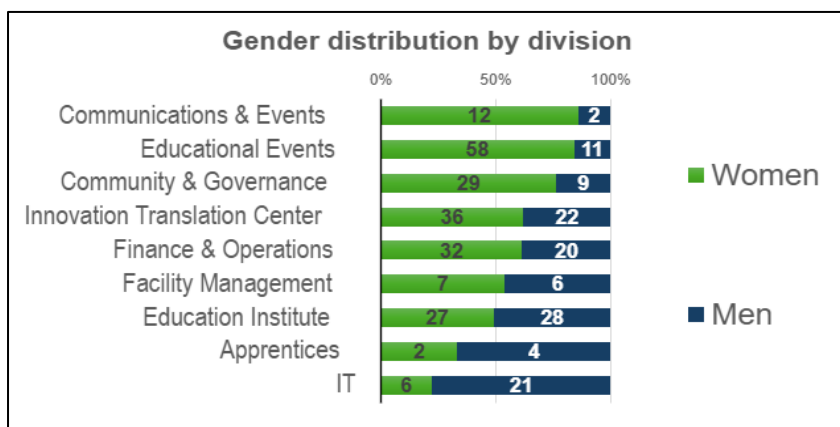
1) Gender distribution of AO Foundation employees

As of January 2025, women comprised 63% of the Swiss workforce at the AO Foundation, while men accounted for 37%, reflecting a higher representation of women within the organization.



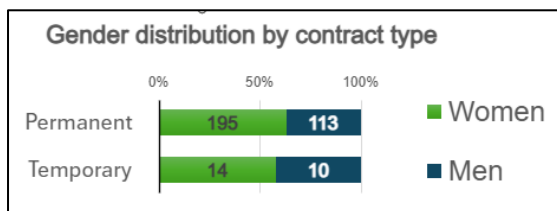
2) Gender distribution by division

The range of women employed in the different AO divisions varied from 86% in Communication and Events to 22% in IT. Most departments are above 50%, except for IT and apprentices, which are 22% and 33% respectively.



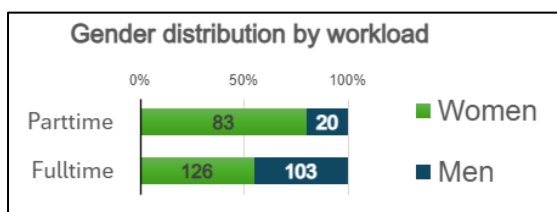
3) Gender distribution by contract type

The AO Foundation gender distribution based on contract type shows a prevalence of permanent contracts for women versus temporary employment.



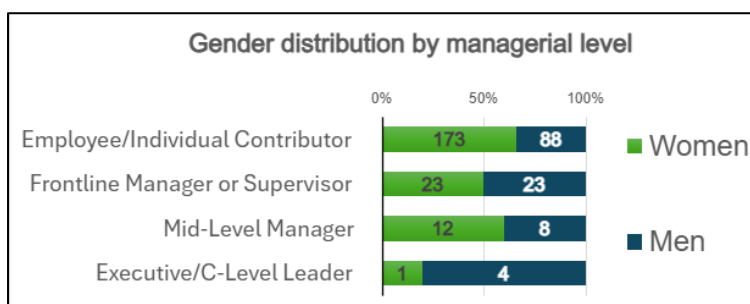
4) Gender distribution across workloads

Women account for 81% of part-time and 55% of full-time roles, indicating a moderate imbalance toward part-time employment, since overall, women represent 63% of the total workforce.



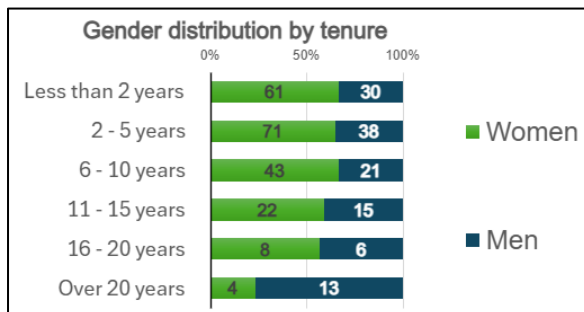
5) Gender distribution across managerial level

Women represent 66% of individual contributors, 50% of frontline managers (managers of individual contributors), 60% of mid-level managers, and 20% of executive leaders. Since women make up 63% of the workforce, they are slightly underrepresented among frontline managers and highly underrepresented within the executive leaders.



6) Gender distribution by tenure

Women comprise 65–67% of employees with less than ten years of tenure. Their representation decreases as tenure increases, falling below the overall average of 63%. After 20 years of service, men account for 72% of the workforce.



4.4. Employee Survey (*Great Place To Work*)

An organization-wide employee survey was conducted in **January 2025** using the *Great Place To Work* framework. Twenty-two questions were selected for inclusion in the current report and grouped under the **five recommended content areas** of organizational culture, work-life balance, leadership, career development, and recruitment.

Results were analyzed using a gender disaggregated approach, with particular attention to items showing differences **greater than 10 percentage points** between women and men.

1) Organizational culture and work-life balance

The 2025 survey results show that employees generally perceive the AO as fair and inclusive across gender, race, age, and sexual orientation. Some gender-based differences were identified in specific areas, particularly in perceptions of age and gender fairness and in views on organizational dynamics such as internal politics and backstabbing. Perceptions of pay fairness were comparatively lower overall but did not differ significantly between genders.

The overall Engagement score was 78%, which qualified the AO Foundation for a *Great Place To Work* certification.

Responses related to work-life balance were consistently high across genders. These results reflect existing organizational measures, including flexible working arrangements, which support employees in balancing professional and personal responsibilities.

Organization culture			
Survey Questions	Positive Response in %	Women	Men
People here are paid fairly for the work they do.	56	57	55
People here are treated fairly regardless of their age.	82	87	76
I can be myself around here.	78	80	77
People here are treated fairly regardless of their race.	95	96	95
People care about each other here.	79	77	82
People here are treated fairly regardless of their gender.	87	83	95
People avoid politicking and backstabbing as ways to get things done.	55	58	48
People here are treated fairly regardless of their sexual orientation.	98	98	97
I am treated as a full member here regardless of my position.	77	79	75
Taking everything into account, I would say this is a great place to work.	72	75	69
Average	78	79	77

Work Life Balance			
Survey Questions	Positive Response in %	Women	Men
Our facilities contribute to a good working environment.	73	73	72
People are encouraged to balance their work life and their personal life.	72	71	77
I am able to take time off from work when I think it's necessary.	89	88	91
Average	78	77	80

2) Gender dimension in research content

We are fully committed to integrating gender and ethnicity dimensions into all our research and teaching activities. This means that we systematically consider both biological differences (sex-based) and social factors (gender and cultural background) when designing studies, conducting analyses, and developing curricula.

In our clinical investigations, this approach is reflected in the systematic collection and analysis of data on participants' sex, gender, and ethnicity, as well as in inclusive, non-discriminatory recruitment practices. Participants are not excluded on the basis of gender or ethnicity unless this is scientifically justified by the study protocol. As a result, our research is more inclusive and produces more rigorous and relevant outcomes that reflect diverse populations. This approach aligns with Horizon Europe's expectations for sex- and gender-responsive research.

Despite these strengths regarding our research content, we recognize a clear gap in gender balance within our research leadership roles, particularly the underrepresentation of women as principal investigators (PIs) and project leaders. Currently, fewer than 15% of PIs in our programs are women. This imbalance affects both fairness and performance: diverse leadership teams strengthen research quality and innovation, and visible role models are essential for the development and retention of junior women scientists. Addressing this gender gap in research leadership is therefore a key priority moving forward.

To address this gap, our Inclusive Excellence Plan introduces targeted measures to improve gender balance among PIs. These measures include mentorship and leadership development programs for women scientists, proactive recruitment of diverse

candidates for PI roles, and regular monitoring of gender diversity in project leadership. Through these ongoing actions and planned initiatives, the AO demonstrates our commitment to integrating gender perspectives across our research activities and to fostering greater gender equity within our research teams.

3) Leadership and decision making

Scores for leadership and decision-making were generally lower than for other content areas, with less than a 10% difference between male and female responses. Employees generally regard management as honest and ethical in its business practices; however, perceptions are less positive when it comes to impartial treatment of staff and a genuine personal interest in employees.

Leadership & Decision making			
Survey Questions	Positive Response in %	Women	Men
Managers avoid playing favorites.	53	53	55
Management is honest and ethical in its business practices.	71	74	66
Management shows a sincere interest in me as a person, not just an employee.	61	62	61
Average	62	63	61

4) Recruitment and career progression

Overall, employees lack confidence in the fairness of promotions and perceive a degree of favoritism. There are also concerns that management does not always hire the best fit for roles and that training and development opportunities are limited. As a result, the overall score for hiring, promotion, and employee development indicates room for improvement.

In addition, women report fewer opportunities for training and career development than men (11% difference), whereas perceptions of recruitment and career progression are otherwise similar across genders.

Recruitment and Career Progression			
Survey Questions	Positive Response in %	Women	Men
I am offered training or development to further myself professionally.	65	61	72
Managers avoid playing favorites.	53	53	55
Promotions go to those who best deserve them.	42	41	44
Management hires people who fit in well here.	57	58	56
Average	54	53	57

5) Gender-based violence

As part of the IE Policy, gender-based violence is addressed through a fair and transparent process that raises awareness and supports employees in reporting incidents. The survey did not include a dedicated item explicitly measuring gender-based violence (e.g. harassment, sexual harassment, intimidation). However, related aspects, such as psychological safety and non-discrimination, are important prerequisites and are reflected in the Inclusive Excellence Plan framework for addressing gender-based

violence. The following items can therefore be considered as foundational indicators, rather than direct measures:

Gender-based violence			
Survey Questions	Positive Response in %	Women	Men
This is a psychologically and emotionally healthy place to work.	60	60	62
Our facilities contribute to a good working environment.	73	73	72
People here are treated fairly regardless of their gender.	87	83	95
People avoid politicking and backstabbing as ways to get things done.	55	58	48
If I am unfairly treated, I believe I'll be given a fair shake if I appeal.	56	56	56
I am treated as a full member here regardless of my position.	77	79	75
Average	68	68	68

Examining the individual questions, men scored lower than women in relation to “politicking and backstabbing” and higher on the question about “psychologically and emotionally healthy place to work”, and on the fairness despite their gender. There is no indication of different perceptions between men and women regarding a psychologically and emotionally healthy place to work.

The average scoring for women and men is identical.

Overview of the composition of the survey participants

Gender	Number	%
Female	182	63.9%
Male	103	36.1%

Division	Number	%
Educational Events	60	21.4%
Innovation Translation Center	47	16.8%
Education Institute	45	16.1%
Community & Governance	30	10.7%
Finance & Operations	28	10.0%
IT	21	7.5%
Human Resources	15	5.4%
Facility Management	12	4.3%
Communication & Events	11	3.9%
Network Clinical Research	6	2.1%
Apprentices	5	1.8%




Age range	Number	%
25 years or younger	11	3.8%
26 years to 34 years	51	17.4%
35 years to 44 years	95	32.4%
45 years to 54 years	79	27.0%
55 years or older	57	19.5%






Tenure	Number	%
Less than 2 years	75	25.6%
2 years to 5 years	99	33.8%
6 years to 10 years	60	20.5%
11 years to 15 years	30	10.2%
16 years to 20 years	14	4.8%
Over 20 years	15	5.1%

Managerial Level	Number	%
Employee/Individual Contributor	226	77.1%
Frontline Manager (supervises other employees, not other managers)	41	14.0%
Mid-Level Manager	21	7.2%
Executive/C-Level Leader	5	1.7%

5. Action Plan

Based on the three pillars of awareness, training and development, and policies and practices, and informed by employee feedback and HR data, key priority areas were identified—particularly in leadership, career development, and perceptions of fairness. The following action plan translates these findings into targeted measures to strengthen inclusion and gender equity.

A) Objectives – Outcome from i) survey data & ii) aggregated HR data evaluation				
Action	Target	Task Force	Priority	Timeline / Done
ii. From HR data				
Gender gap and recruitment	Specific recruitment measures for diverse & gender-neutral workforce: implement unconscious bias training – pls see in this table *1 Training	--	-	-
	Recruitment process, with documented procedures and career page to recruit diverse & gender-neutral workforce	Recruiter/ HRBPs	High	 2024
	Address gender gap in Senior Management – increase by 20% of female incumbent	AO EC / Head HR	Medium	Within next 5 years
i. From survey data				
Training and development opportunities	New Training & Development Framework implemented	Head HR	High	 10/2024
	Improve career progression by elaborating and implementing career paths for the different business units (indicators, promotions)	Head HR/ HRBP / Bus. Units	High	2026/2027
Increase salary transparency	Increase transparency on salaries by revising the Compensation Policy & new benchmarking provider with new salary bands implemented and made accessible	Head HR/ Compensation Mgr.	High	 06/2024-01/2026
	Gender Equality Act: Apply Equal Pay Analysis (Logib) for Switzerland, make results accessible within the AO & take appropriate measures	Compensation Mgr.	Medium	2026
Backstabbing and politicking	Increase psychological safety (within a broader Leadership Development Program) by implementing training for LMs and employees	HR/ IEFG	High	2027

Increase the number of female PIs	Increase the proportion of female Principal Investigators (PIs) or Sub-Investigator (SIs) in AO clinical investigations by 20%	AO EC / ITC LS team	Medium	2028
Systematic collection of sex- and gender-disaggregated data in clinical research	Ensure gender-responsive research – ongoing data collection	ITC Research Units	Ongoing	
Cultural insights	Run the Culture Brief & Culture Audit with GPTW, as part of the Employee Survey	Head HR/ Sr HRBP	Medium	2027 / 2028
B) Objective(s) – Ongoing Inclusive Excellence				
Increase Awareness				
	Annual webinars/ events/ campaigns (measure number of activities, participation rates)	IEFG		Annual
	Internal and external posts on special days (IWD, Pride month, IMD, Equal Pay Day)	IEFG		Annual
	2 intercultural employee events p.a.	IEFG		Annual
Training				
	Content creation for training modules on i) unconscious bias (including recruitment *1), ii) intercultural training, iii) inclusive language, and iv) the Inclusive Excellence Policy (linked to *2)	HR/ IEFG /Sr Recruiter	Medium	As of Q1 2027
	Training modules: to reach an average participant score of 60% (year 1 to 3 after implementation of a module)	HR/ IEFG	Medium	As of Q1 2027
Policies and Practices				
	Implement Employee Assistance Program (EAP) for external anonymous support – Switzerland	IEFG / Health Mgmt.		 10/2024
	Implement Employee Assistance Program (EAP) for external anonymous support – All regional offices	IEFG / Health Mgmt.		 04/2026
	Inclusive Excellence Policy (including process of complaints) – Switzerland, implemented	IEFG		 02/2025
	Inclusive Excellence Policy (including process of complaints) – BR, Col, China, Hongkong, implemented	IEFG		 01/2026
	Issue a new guideline on inclusive language and unconscious bias in recruiting	Sr Recruiter	Medium	2027

***2 Implementation of a Learning Management System (LMS) planned by end of 2026**

6. Conclusion

By aligning our ongoing DEIA efforts with the requirements of the EU Horizon program, this document reinforces the commitment by the AO Executive Committee and our employees to gender equality with clear goals and actions.

7. References

1. [European Commission, *Horizon Europe Guidance on Gender Equality Plans*, 2021.](#)
2. [Swiss Federal Council, *Swiss Gender Equality Strategy 2030*, adopted April 28, 2021.](#)
3. [European Commission: Directorate-General for Research and Innovation, *Gender equality plans \(GEPs\) – How to be ready for ex-post checks*, 2026.](#)

Annex I

Inclusive Excellence @ the AO - Roadmap Recap

Milestones since early 2024

