



D3.1 - Guidelines for GEPs' implementation

WP3 - Designing GEPs for systemic institutional change

Lead contributor

Ilaria Di Tullio, IRPPS - CNR

Ilariaditullio@irpps.cnr.it

Other contributors

Lucio Pisacane, IRPPS - CNR

Nicolò Marchesini, IRPPS - CNR

Marco Cellini, IRPPS-CNR

Serena Tagliacozzo, IRPPS-CNR

Reviewers

Giovanna Declich, K&I

Claudia Colonnello, K&I

Federico Marta, K&I



MINDtheGEPs
gender equality in research

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Abstract

The present deliverable is the main outcome of the T3.1 – Guidelines and Training for GEPs implementation and it entails to produce a useful tool for the development of Gender Equality Plan to be carried out within each MINDtheGEPs implementing organisation.

Taking into consideration the European Commission legislation concerning Gender Equality and the Horizon Europe eligibility criteria, this deliverable envisages a series of suggestions and recommendations that each partner could follow concerning the most appropriate actions aligned with its proper needs. In line with the Grant Agreement, the deliverable furnishes practical guidelines for putting gender equality plans into practice in the implementing organisation, with schemes on what key areas need to be addressed, what objectives have to be reached, what indicators are needed to set targets, the importance of a monitoring system. Guidelines and suggestions are based on the European policy framework but also on lessons learned and experiences gained from several European projects focused on the implementation of GEPs across Europe.

Document history

| Version | Date | Description | Reason for change | Distribution |
|---------|----------|--------------------------|-------------------|--------------|
| V1.0 | 05/02/22 | starting draft | | WP3 group |
| V1.2 | 01/03/22 | defining objectives | | WP3 group |
| V2.0 | 20/04/22 | defining pillars | | WP3 group |
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Information in this report that may influence other MINDtheGEPs tasks

| Linked task (beside T3.1) | Points of relevance |
|--|--|
| T3.2 Connecting GEPs to national provisions on gender equality | sharing information about the process of implementing GEP in each organisation |
| T.3.5 Setting up context-sensitive GEP within the project lifespan | informing |
| T3.6 Decision-making bodies: gendering leaders and institutions | sharing information about the implementation of GEP boards |
| T7.5 – Support for the self-evaluation of GEP teams and WPs | to inform monitoring and evaluation process |



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List of acronym, abbreviation

| Acronym, Abbreviation | Definition |
|------------------------------|---|
| Classif. | Classification |
| D | Deliverable |
| DoA | Description of Action |
| DMB | Decision Making Bodies |
| EC | European Commission |
| EIGE | European Institute for Gender Equality |
| EP | European Parliament |
| ERA | European Research Area |
| EU | Europe |
| FOS | Fields of Science Classification |
| GE | Gender Equality |
| GEP | Gender Equality Plan |
| HM | High Management |
| HHRR | Human Resources |
| H2020 | Horizon 2020 |
| ISCED | International Standard Classification of Education |
| ISO | International Standards Organisation |
| ISO 3166 | International Standard for country codes and codes for their Subdivisions |
| ISO/IEC 5218 | Codes for the Representation of Human Sexes |
| OECD | Organisation for Economic Cooperation and Development |
| RFO | Research Funding organisation |
| R&D | Research & Development |
| RPO | Research Performing Organisation |
| S&T | Science & Technology |
| SCL | Standard Code List – Marital Status |
| T | task |
| UNESCO | United Nations Educational, Scientific and Cultural Organisation |



1. Introduction

In the framework of WP3 “Designing GEPs for systemic institutional change”, the Deliverable 3.1 “Guidelines for GEPs implementation” aims at pursuing the objectives settled under Task 3.1-Guidelines and “train the trainers workshop” for GEPs implementation. The aim is to provide practical guidelines for putting gender equality plans into practice in each of the seven implementing organisations within the MINDtheGEPs (UNITO, CNR, UJ, UG CTAG, ETF, ITT).

These practical guidelines follow and take into account the changes introduced by the Horizon Europe Guidance on Gender Equality Plans (2021) delivered by the DG Research and Innovation of the European Commission. Concepts presented in this deliverable have been acknowledged by EIGE as crucial elements to ensure gender equality in academic and higher education organisations, as well as research performing and research funding organisations (EIGE, 2016A). As the implementing organisations taking part in the MINDtheGEPs project are of that nature, the contents proposed are aligned with those recommended by EIGE. The definition of a practical guidelines, to design and implement GEPs, are based on evidence from institutional data gathered during the initial assessment exercise promoted during the first stage of the project, along with gained experience from sister projects.

This deliverable is based on the outcomes produced by the literature review within gender equality sister projects, the experience on previous H2020 European commission projects (GENERA, RI-PEERS, PLOTINA, TRIGGER, LIBRA, GE ACADEMY, CASPER); a shared knowledge within WP4 - Balancing recruitment, retention and career progression, WP5 - Empowering women in decision making process, WP6 - Gendering research and teaching. It is also based on the results of the collection of already implemented practices/actions within the consortium, starting in February 2022 from CNR. The proposed indicators have been sorted out by considering the best practices in existing GEPs and sharing knowledge with UNITO and WP4, WP5, WP6.

The delivering of this report, previously due to month 11 (December 2021), in agreement with the Project Officer, was moved to month 17 (June 2022) due to the general shift of the end of the project, of six months.

1.1 Scope

Work Package 3 (WP 3) “Designing GEPs for systemic institutional change” is subdivided into seven main tasks, which focus on achieving four main operational objectives:

- to outline the theoretical and methodological frameworks for designing and implementing customised Gender Equality Plan, providing “train the trainers workshop” and common indicators that are realistic and measurable;
- to assure implementation of effective context-sensitive actions based on a participatory and mutual learning approach within and across organisations;
- to create the conditions for systemic institutional change, through the definition of the legal framework and operational conditions needed for the sustainability of GEPs;



- to implement gender mainstreaming and ensure GEPs' sustainability beyond the life of the project.

In consideration of the objectives of this WP, a first important step was the development of these guidelines as a useful tool to provide basic operational guidance to the implementing teams for the design of their ex-ante GEP. Indeed, the contribution of the MINDtheGEPs partners has also been crucial to focus the deliverable on identifying the tools which are going to aid the implementation of their preliminary GEPs, which were designed according to their institutional needs.

1.2 Overall aim

The main objective of the deliverable is to provide practical guidelines and tools to MINDtheGEPs partners implementing GEPs in their organisations. The guidelines suggests to follow the four process-related steps (public document, dedicated resource, data collection and monitoring system, training) and, also, it recommends five thematic areas to be followed: Work-life balance and organisational culture; Gender balance in leadership and decision-making; Gender equality in recruitment and career progression; Integration of the gender dimension into research and teaching content; Measures against gender-based violence, including sexual harassment.

These guidelines aim to define the crucial steps for the design/development the implementation of a GEP. In doing this, we identified two master pillars leading the entire process which are: the data collection system and the training system. These play in fact a pivotal role in the identification of gaps and lacks, create a common understanding of the process within the organisation, fixing the GEP priorities. Besides that, a preliminary list of possible indicators for the MINDtheGEPs key areas have been identified, to be taken into consideration and which allow the set-up of a monitoring system able to evaluate progresses. In conclusion, some recommendations are suggested.

1.3 Structure of the deliverable

This deliverable is structured as follows: it presents the Executive Summary, followed by an introductory section (this one) and 6 sections, which all together answer the aims of the tasks 3.1 - Guidelines and "train the trainers workshop" for GEPs implementation, 3.4 Establishment of GEPIB and MDN in each Implementing Organisation, 3.5 Setting up context-sensitive GEP within the project lifespan.

Section 3 "Practical guidelines on developing a GEP and Key areas need to be addressed" provides a focus about how to define steps for developing a GEP, focusing on the four key areas of the MINDtheGEP projects.

Section 4 "Status quo about the definition of the GE Boards" offers a quick insight on the level of constitution of the Gender Equality board within each organisation.

Section 5 "Objectives and Actions" describes the objectives to be pursued as well as the two major pillars needed to be settled (data collection and training).

Section 6 "List of possible indicators by key areas envisages a series of useful indicators to be used if feasible and if aligned with the objectives of each GEP.



Section 7 “Monitor and evaluate progresses at the organisational level” describes the process of the monitoring and the evaluation strategy.

Section 8 “Recommendations to set targets and monitor progress at the organisational level” envisages a series of recommendations to take into account in order to better achieve the fixed goal of a GEP.

Finally, there is a list of the “References” used to produce this work.

2. The lifecycle of a GEP and the key areas to be addressed

2.1 Steps for developing a GEP

The provision of a GEP must not be considered as a monolithic stable and timeless but must be considered as an ongoing process for improving gender equality. The European Institute for Gender Equality's definition of Gender Equality Plan states that providing a tailored GEP requires to define a process aimed at achieving gender equality by identifying specific organisations' needs.

“An effective GEP should be founded on a model of change that identifies the problems it seeks to address, their causes and desired outcomes, including targets; it should detail the set of activities that are required to achieve the aims, and indicators to monitor progress. A GEP should engage the whole organisation, from senior leaders to staff, students (in the case of a teaching organisation) and stakeholders, and it should form an ongoing process that encourages self-reflection and review of processes and practices”. (EU, 2021)

In particular, it entails to follow a circular and iterative process consisting of five consecutive phases, constituting, a typical lifecycle of a GEP.

These phases are:

1. *audit phase* (collection of data, review of existing practices, analysis of law, it's the diagnosis phase, where sex-disaggregated data is collected);
2. *planning phase* (identification of targets and allocation of resources, activities to achieve objectives, needs and concerns are defined);
3. *implementation phase* (planned activities start, as well as training to build capacity and support);
4. *monitoring phase* (Pay attention to process and progresses of the implemented activities and measure their);
5. *impact and evaluation phase* (evaluate and ensure the sustainability of the implemented GEP, and refining starting from the top, as a circular and iterative process, ongoing review of findings and progresses).



A GEP should be the result of a reflection of all employees concerning crucial areas for the wellbeing of both, women and men of all levels, roles, profiles, type of contract (full-term, part-time, permanent, fixed term).

2.2 Key areas

MINDtheGEPs project followed the identification of the four different key areas for implementing GEPs, as illustrated in the figure 1. Due to the time mismatch between the MINDtheGEPs proposal and the introduction of the “Horizon Europe Guidance on Gender Equality Plans”, in which are redefined five key recommended content-related (thematic) areas that organisations should consider for the development of their GEP, the project is aligned with the new EU guidance regarding the key areas of design for GEPs. This partially overlap whit the four areas considered by the MINDtheGEPs project plus one devoted to measures against gender-based violence, including sexual harassment. Indeed, the EU Gender Equality Strategy delivers on the von der Leyen Commission’s commitment to achieving a Union of Equality presents policy objectives and actions to make significant progress in all domains of gender quality, pursuing a dual approach of gender **mainstreaming** combined with targeted actions, and **intersectionality** is a horizontal principle for its implementation (see [Gender Equality Strategy 2020-2025](#)).

The EU Commission recommended areas are the following:

- 1. Work-life balance and organisational culture:** GEPs aim to promote gender equality through the sustainable transformation of organisational culture. Organisations should implement necessary policies to ensure an open and inclusive working environment, the visibility of women in the organisation and externally, and that the contribution of women is properly valued. Inclusive work-life balance policies and practices can also be considered in a GEP, including parental leave policies, flexible working time arrangements and support for caring responsibilities.

Examples from best practices:

University of Trento (Italy): Since 2006 it has been established a day nursery, which operates providing services for up to 30 children. The monthly cost is about 380 euros for a full-time service. Each academic year employee’s access to the service through a ranking list, the score is associated with the working time, which affects negatively the family care. Postdocs and PhDs are considered part-time employees. Link: <https://www.unitn.it/>

Imperial College London (United Kingdom): It operates a salary sacrifice scheme for childcare vouchers. The college has allocated funds (around 124 £) each month to each parent to offset the costs of childcare vouchers. Link: <https://www.imperial.ac.uk/>

- 2. Gender balance in leadership and decision-making:** Increasing the number and share of women in leadership and decision-making positions touches upon all aspects in the GEP. Measures to ensure that women can take on and stay in leadership positions can include providing decision-makers with targeted gender training, adapting processes for selection and



appointment of staff on committees, ensuring gender balance through gender quotas, and making committee membership more transparent.

Examples from best practices:

NSHW HEALTH service: All Senior Executive Service (SES) and Health Executive Service (HES) non-clinical executive positions must have at least one female on the short list for interview. Care should be taken to avoid unconscious bias, particularly in relation to what may be considered traditional male or female roles. Consideration should be given to encouraging women to consider traditional male roles, for example, through provision of career information, training, and targeted promotion of job opportunities to women. Link: <https://www.health.nsw.gov.au>

Norwegian Institute of International Affairs (Norway) NUPI has launched two programmes for increasing gender equality in senior-level academic: a program focusing on promotion and mentoring to help women to qualify for promotion to the equivalent of professor level and a group leadership program involving mentoring and a focus on competence development. Link: <https://www.nupi.no/en>

3. Gender equality in recruitment and career progression: Critically reviewing selection procedures and overcome any biases can ensure that women and men get equal chances to develop and advance their careers. Establishing recruitment codes of conduct, involving gender equality officers in recruitment and promotion committees, proactively identifying women in underrepresented fields and considering organisation-wide workload planning models can be important measures to consider in a GEP.

Examples from best practices:

Centre national de la recherche scientifique (France): CNRS organises awareness raising activities for decision-making regarding recruitment and promotion. They also invited external gender experts in order to identify gender bias in treatment of candidates. In the application form for the evaluation, awarding and promotion process, it was also recommended to put forward two names (a woman and a men) to ensure gender balance. Link: <https://www.cnrs.fr/>

Artic University of Norway (Norway): It has established a targeted recruitment: before any permanent position is announced, a search committee is established. A successful application process is defined by a minimum of 40% female applicants. Link: https://en.uit.no/om/art?p_document_id=343547&dim=179040

4. Integration of the gender dimension into research and teaching content: The GEP should consider how sex and gender analysis will be included in the research or educational outputs of an organisation, including research approaches, methods and practices. It can set out the organisation's commitment to incorporating sex and gender in its research priorities, the processes for ensuring that the gender dimension is considered in research and teaching, and the support and capacity provided for researchers to develop methodologies that incorporate sex and gender analysis. Research funding and research performing organisations both have a role to play in ensuring this.

Examples from best practices:



'Gendered innovations' is a website providing recommendations, examples, case studies and tools related to sex and gender analysis in research content for various scientific fields.

The report Gendered Innovations 2: How inclusive analysis contributes to research and innovation and addressing areas such as health, artificial intelligence and robotics, energy, transport, marine science and climate change, urban planning, agriculture, fair taxation and venture funding, and the COVID-19 pandemic.

5. Measures against gender-based violence, including sexual harassment: Organisations establishing a GEP should consider taking steps to ensure they have clear institutional policies on sexual harassment and other forms of gender-based violence. Policies should establish and codify the expected behaviour of employees, outline how members of the organisation can report instances of gender-based violence and how any such instances will be investigated and sanctions applied. They should also consider how information and support is provided to victims or witnesses and how the whole organisation can be mobilised to establish a culture of zero tolerance toward sexual harassment and violence.

Examples from best practices:

CNR (Italy) has recently published the code of conduct where a list of recommendations to promote a context toward a more gender sensitive climate. The code of conduct targets all the employees involved in the organisation.

Sciences Po (Paris) developed *Guidelines on Dealing with Sexual Harassment* in the context of the EU-funded structural change project 'Effective gender equality in research and academia' (EGERA), which were updated in 2021 following a comprehensive review entrusted to a panel of internal and external experts. The whole policy addresses students and staff.

The implementation and the improvement of GEPs among MINDtheGEPs partners follow the theoretical and empirical literature review, including best practices, with the scope of designing and implementing self-tailored GEPs with a coordinated mix of structural and cultural actions. For this reason, each dimension of gender equality has started to address needs and concerns highlights from the input of WP4, WP5, WP6.

However, already in the design phase of the proposal, the MINDtheGEPs project included among the areas to be addressed as GEP that of sexual harassment and gender stereotypes: in fact, although mainly at policy level, through the mapping at meso level (WP2, task 2. 3) information was collected on (i) the presence of internal policies on gender-sensitive language, (ii) the presence of specific training to raise awareness on gender stereotypes in recruitment and research, (iii) the presence of internal policies and protocols to deal with gender-based violence. The MINDtheGEPs research phase and GEP implementation supports the intersectionality approach of gender inequality with other form of disadvantage/discrimination including seniority, age, precarity of contract, multiple background of professional experiences.

For this reason and, in order to follow the requested building block as eligibility criterion for the Horizon Europe work-program, MINDtheGEPs partners have started thinking how to plan and implement measures and actions aligned with the requested key areas. Initially, in the design phase of the MINDtheGEPs proposal the addressed area was 4 (figure below). With the recent introduction of



the eligibility criteria from the EU Commission an additional area related to sexual harassment have been covered by all the GEP.



Figure 1: MINDtheGEPs Key areas

3. Establishment of the GEPs Boards

With the aim of implementing a GEP which could effectively lead structural change, it is important to have boards and committees supporting the defined measures and actions. Following this line and, as declared in the Grant Agreement, MINDtheGEPs project, in the task 3.4, task 3.6 and task 3.7 envisage the setting of different committees that should collaborate at the implementation of the GEP. These boards are the GEPIB (Gender Equality Plan Implementing Board); the MDN (MindtheGEPs Delegates Network); the GEM (Gender Equality Manager); the GDB (Gender-Database Manager).

Each organization establishes tailored board, this highlights the importance to adapt this structure in each organizational context.

Even though, the implementation of these bodies is still in progress, the MINDtheGEPs partners have started established the formal boards of stakeholders.

Concerning the GEPIB, all the seven implementing partners (UNITO, CNR, UJ, UG, CTAG, ETF, ITT) have established GEPIB (Gender Equality Plan Implementing board) with a formal commitment of the institution. For instance, UG GEPIB has been officially established and announced by the Rector's on 17th August 2021; UNITO has formally instituted it and ETF has nominated the board and identified persons to be involved.



Concerning the MDN (MindtheGEPs Delegates Network), even though the work on this task was supposed to start at M18 (June 2022), the process was already triggered by each implementing partner, in parallel with the initial assessment exercise. A formal establishment of these networks is ongoing and their function will be active till the end of the project. This is in line with the task which starts at month 18 (June 2022) till the end of the project. In particular, UG has recently expanded the UG Social Responsibility Commission to also include representatives from almost all UG faculties and units, who will act as liaison with their units on equality issues. Commission consists of 20 members.

All partners have identified a GEM (Gender Equality Manager) and a GDB (Gender-Database Manager) even if, still, without formal commitment

4. Steps for setting up a GEP

The eligibility criterion identified by the European Commission provides a path on how to set up a GEP four mandatory requirements for setting up a GEP (for details see European Commission, Directorate-General for Research and Innovation 2021, p.20). Building on this requirements this guidelines propose to set the GEP as a public formal document approved by the organisation's top management; (2) have dedicated human and financial resources; (3) have a structured and continuous gender-disaggregated data collection & monitoring; and (4) include awareness-raising and training actions on gender equality and unconscious gender biases.

1. Public document: The GEP should have a formal document published on the institution's website, signed by the top management and actively communicated within the institution. It should demonstrate a commitment to gender equality, set clear goals and detailed actions and measures to achieve them.

2. Dedicated resources: a GEP should have dedicated resources and expertise in gender equality to implement the plan. Organisations should consider what type and volume of resources are required to support an ongoing process of sustainable organisational change.

3. Data collection and monitoring: organisations should collect sex/gender disaggregated data on personnel (and students, for the establishments concerned) with annual reporting based on indicators. Organisations should consider how to select the most relevant indicators, how to collect and analyse the data, including resources to do so, and should ensure that data is published and monitored on an annual basis. This data should inform the GEP's objectives and targets, indicators and ongoing evaluation of progress

4. Training: The GEP should include awareness-raising and training actions on gender equality. These activities should engage the whole organisation and be an evidence-based, ongoing and long-term process. Activities should cover unconscious gender biases training aimed at staff and decision-makers and can also include communication activities and gender equality training that focuses on specific topics or addresses specific groups. Many resources for training design can be found online and translated into the specific organisational context ([Gender Academy](#), [ACT](#))

Those are the four key steps for GEP implementation, but every organisation might have specific needs and processes to be considered when [designing a structural change action](#).



Since data collection & monitoring and training require cross-thematic and complex actions across the five areas, they serve as **pillars** in this document (see par 4.1 e 4.2), upon which the GEP architecture rests.

4.1 Pillar 1: Data collection and monitoring system

GEPs should be **evidence-based** and founded on **sex or gender-disaggregated baseline data** collected across all staff categories. Indeed, any policy cannot address and tackle any problem without having a clear and defined knowledge of the situation or having specific data regarding the issue. Therefore, being a strategic policy a GEP should follow the “no data, no problem, no policy” principle.

The data each organisation collects should not only enable to unveil the existing differences between women and men in different roles and levels of the organisation but **should reflect the mission of the organisation** itself: for instance, the personnel and their skills, the research and teaching performance, the outreach ability at the individual and organisational level, the success of attracting skills and funds, the relations and agreements with the local and national industrial system. Furthermore, in many countries of Europe talking about “gender statistics” means referring to data disaggregated by sex at birth, and usually with a traditional or binary (male - female) approach. However, with a view to inclusivity and non-discrimination, collecting data under the worker's **gender identity** or, at least, allowing for a third category - male, female, and non-binary¹ -, would be crucial to allowing the GEP's range of actions to be extended to a wider audience.

The data collection goals

The data collection from a gender perspective helps each organisation to achieve four different goals:

1. the establishment of a **baseline situation** on gender inequalities within the organisation to be considered as a starting point for the future and against which to measure possible structural and cultural improvements;
2. conducting a **gender equality analysis** to identify the organisation's areas of strength and weakness, and thus being able to define GEP target-oriented actions according to the organisation's priorities;
3. **monitoring** such actions to guide and to be able to adjust the GEP process in mid-course, quantifying the ongoing progresses;
4. **communicating** to the organisation's staff, students, other key stakeholders and the wider public about the organisation's commitment to gender equality and the progress made.

Assessing inequalities

Gender inequalities within the organisation can involve a wide range of aspects, many of which are not obvious at first glance. In fact, the challenge is not only to identify the number of men and women per

¹ For more information of sex/gender disaggregated data, please see Annex B, General Methods, “Asking about gender and sex in surveys”, p.192-194 of the *Gendered Innovations 2: How inclusive analysis contributes to research and innovation* policy report (European Commission, 2020).



role and per organisational structure (e.g., university departments) but also to highlight potential inequalities in all the activities carried out by the organisation itself: whether research or teaching activities, or rather activities of a more political, managerial, or administrative nature. To meet this challenge and building on proposals already present at international level (e.g., [the She Figures publications](#), [the GEAR tool](#), [the STAGES project guidelines](#), [the Baltic Gender project](#)), MINDtheGEPs recommends working through the four proposed KAs, to which should be added the fifth suggested by the European Commission (Measures against gender-based violence, including sexual harassment).

step 1: set up the experts' working group

The comprehensive and detailed nature of the analysis depends first of all on the **human and financial resources** the organisation has available to carry out the initial assessment. If the organisation has already a person or a body responsible for the gender equality, it could take on the assessment; otherwise it would be necessary to start by identifying the available **internal expertise** (e.g., experts who can support the assessment from a theoretical point of view, both in terms of gender and organisational sociology, as well as data analysis), possibly expanding the group to include some **heads of administrative offices** (e.g., the offices that already collect the data we are interested in, thus opening an ongoing dialogue with data providers), and perhaps make use of expertise from outside the organisation (based on ad hoc funds and funding, or specific partnerships). Since much of the data that will be processed are personal and particular in nature, the inclusion of the **data protection officer** (DPO) in the group might be quite useful for sharing requirements and planning actions following the **GDPR** from the very beginning of the process. Additionally, an **official mandate** from the top management to undertake the initial assessment is essential to the office or working group for devoting the suitable amount of time, for unlocking the appropriate doors, and for getting cooperation from the right offices.

step 2: mapping the data and identify the providers

Much depends on the availability of data: this aspect, although taken for granted, is crucial. In fact, the organisation does not always collect data from a gender perspective for all the aspects to be studied, or this data are not always structured in a digital and queryable database. Therefore, a **mapping of the present, uncollected, non-gender-analysable data is essential** before starting the assessment. By creating a list by topic, data can be defined that (1) can be processed immediately; (2) need time to be systematised and then analysed; (3) are not present or accessible from a gender perspective and therefore require joint work with the administrative offices to be usable (e.g., restructuring databases and the way data are collected through new internal procedures to fill the information gap).

step 3: create a vision

Very often, data are not collected by a single office. Each aspect of an RPO's activity has its own method of data collection and a database in which the data are organised, serving administrative and management purposes. These different systems, however, are not always interlinked and do not serve gender analysis purposes. Therefore, first and foremost, the difficulty of carrying out a gender assessment concerns the ability to illustrate to the organisation's top management the usefulness of such a process. To achieve this purpose, providing a **strategic vision** to top management and office managers can be useful, because they can be involved and made actors in the process by illustrating



the potential of this data for greater management effectiveness and efficiency. Indeed, data collected and systematised from a gender perspective can enable the central administration to plan internal policies on all work aspects not necessarily related to gender inequalities only.

step 4: design the context analyses

Before starting the assessment, knowing the legislative framework concerning gender equality and non-discrimination in the own country is useful, starting with a knowledge of the European framework (and how it has been adopted) and national or regional legislation.

The four identified KAs provide the framework at the organisation level for the initial assessment.

- **KA1: Decision Making Bodies. Gendering Leaders and institutions.** The first area concerns the organisation's decision-making bodies and general management. This collection involves both quantitative information concerning the gender composition of the central bodies (i.e. the top management of the organisation such as the president, director-general, or board of directors), of the administrative structure, and of the various committees or commissions established for specific tasks (such as staff recruitment commissions); and qualitative information such as the presence of a gender approach in the institutional documents or internal policies for the appointment of the different bodies.
- **KA2: Recruitment and career progressions.** This area is the core of the assessment. It concerns the collection of all those data that allow the quantification of gender differences within the organisation: number of men and women within the staff by profile (e.g. research and teaching) and level, differences in career paths (e.g. number of years spent within the same level by gender) and in salaries. It is crucial to be able to collect this information not only at the level of the organisation as a whole but also to break it down to the level of the department and research field: a researcher may not be working in the department of their research field and may therefore find it more challenging to publish in a related field, and consequently encounter further resistance to progression.
- **KA3: Work-life balance.** The information in this KA enables the identification of the status quo regarding the presence of policies and services that support work-life balance. It is a matter of collecting qualitative data on the presence of national or company policies on time and place flexibility for different job profiles, of additions and extensions to national policies on parental leave; but also quantitative data on the presence and access to services such as lactation rooms, company kindergartens, summer camps for employees' children, elderly care, as well as the presence and access to economic bonuses for employees with families.
- **KA4: Gendering Research and teaching.** KA4 provides information on the organisation's performance. In the field of research, it is useful to detect the number of publications or patents by gender, level and profile of the employee; the number of applicants and beneficiaries by gender to local, national or international funds; or the number of fellowships awarded related to gender issues (also in an interdisciplinary perspective). As far as teaching is concerned, it would be useful to have information on the number of students by gender, as well as on gender-related teaching courses and theses submitted.



In addition to the four KAs just mentioned, it would also be appropriate to carry out the assessment for the "**Measures against gender-based violence, including sexual harassment**" area identified by the European guidelines, taking into account that due to the high sensitivity of data concerning gender-based violence, difficulties can often be encountered in data collection. Within the MINDtheGEPs framework, such area is considered in the KA1 "**Decision Making Bodies. Gendering Leaders and institutions**" in terms of the presence and implementation of internal policies and procedures.

For inspiration and to adapt the mapping to the organisation's needs, it may be useful to consult the list of potential indicators identified by the MINDtheGEPs project (see par. 5), the gender audit questionnaire provided by the EU-funded project 'Systemic action for gender equality' (SAGE), and the analysis report produced by the GENDER-NET project.

Through the mapping just described, a top-down approach is used to create a snapshot of the organisation that will serve as the basis for defining the GEP's objectives and actions. However, should not all the desired information be available, a bottom-up approach can be adopted to supplement what is missing. An online survey addressed to all employees, for example, makes it possible to supplement administrative databases for those aspects that are not captured from a gender perspective; it makes it possible to correct information that has been incorrectly recorded in the databases; it makes it possible to collect information on temporary staff that is usually not included in the administrative databases; and it makes it possible to collect information on the organisational culture concerning staff opinions and behaviour, such as the presence of gender stereotypes, perceptions on success factors in the career, opinions on the organisation. If looking for inspiration, the Gender Equality Audit and Monitoring (GEAM) tool and the UniSAFE project offer support both on contents and technical aspects.

step 5: carrying out the assessment of gender inequalities/Imbalances

All the steps just described are functional for data collection, which can be extremely time-consuming. It is therefore important to plan the actions well, especially according to the human resources available. Once the data collection phase has been completed, the assessment can be carried out through **descriptive statistics** and **describing the results**. IN order to unfold specific aspects not tackle through the administrative data or quantitative questionnaire, some interviews or focus groups could be carried out within the organisation, providing additional information to the data collected or bridging the existing information gap (see methodology in deliverable 2.2 - Report on gender imbalance at meso-level). Positioning your organisation against other similar national organisations, or referring to aggregated statistics at national level such as those found in the She Figures publication or the EIGE databases would also be important in order to have a reference context.

Fixing the GEP priorities, defining SMART indicators, monitoring and evaluating the process and results

Once the data has been analysed, the **strengths and weaknesses of the organisation** can be highlighted and relevant gender imbalances to address through the development of a context-sensitive GEP can be identified. In this way, a list of areas that need to be worked on to improve gender balance can be defined, identifying the priority elements. This exercise allows the objectives and related actions



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of the GEP to be clearly formulated, as well as the time frame in which they should be placed and implemented. We must remember that both objectives and actions must be SMART: the **Measurable** characteristic allows us to each implementing organisation to identify, for each action, one or more indicators (both quantitative and qualitative) to verify whether the action has been carried out and how within the identified time-frame. The combination of the measurements of each individual indicator allows **the achievement of the planned action**, and thus an initial evaluation of whether or not the objective has been achieved.

On the basis of the indicators identified for each action, an **annual report** (mandatory by HorizonEurope guidelines) will be produced, which will be used to **communicate internally** within the organisation - to top management and staff - the progress made, but also to show externally to stakeholders or institutions the **organisation's commitment** to achieving gender equality.

Data flow and its relations

As mentioned, the initial assessment serves to produce the knowledge base and to draw a line from which to start. Since not all data will be available the first time the assessment is carried out, one possible strategy to follow may be to **expand the data collection each year**, working to make those aspects that do not yet have this feature analysable from a gender perspective.

Additionally, to meet the eligibility criterion of Horizon Europe, **data must be collected and published annually**. Efforts should therefore be made to make this process almost automatic by implementing procedures that make data collection and analysis a constant flow of data from the relevant offices to the group in charge of the process.

In addition, the collection of data on an annual basis allows the monitoring process (see par. 6) to be started at the same time as the implementation of the GEP, so that the actions the organisation will take to achieve gender equality can be guided with awareness. This process, moreover, only partly overlaps with Gender Budgeting. In fact, Gender Budgeting is often drafted on a two-yearly basis and provides a static overview of the organisation's situation at a certain date (often but not necessarily 31 December). The assessment required for the GEP and updated annually, on the other hand, provides much more detailed information, including qualitative information that feeds into the GEP's own monitoring process. If the GEP's actions have a real impact on the structural aspects of the organisation and, in the longer term, on the cultural ones, these changes will be recorded by Gender Budgeting, which will track changes over time. Conversely, the main results of Gender Budgeting will allow the organisation to update, enrich and modify the GEP because they will be part of the evaluation of the Plan itself, creating a continuous process that should be strengthened over time.

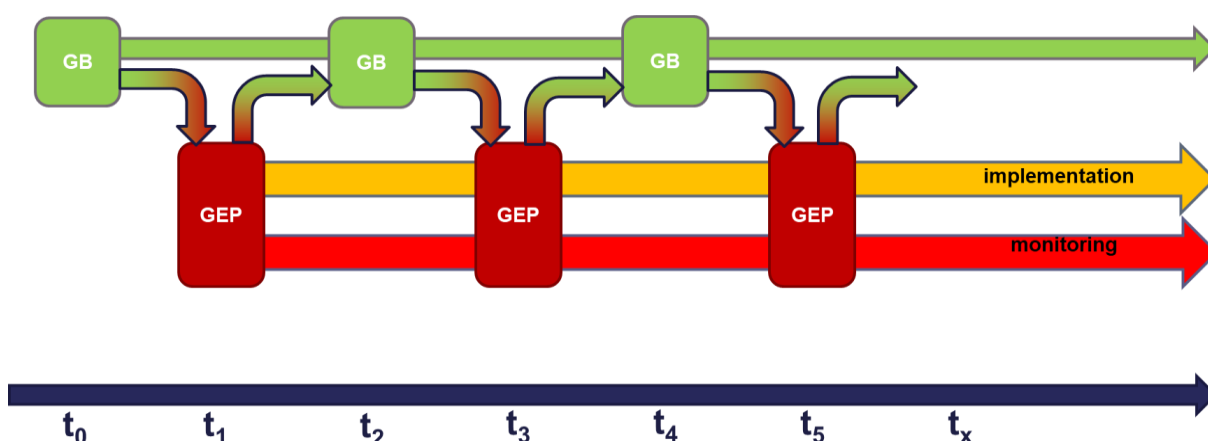


Figure 2: MINDtheGEPs dataflow and its relation

4.2 Pillar 2: Training and raising awareness initiatives

Trainings are widely considered as one of the most efficient tools to raise and increase awareness and sensitivity about gender equality, as well as, about diversity and inclusion. In this deliverable we support the conviction of the EU about the importance of the trainings and we consider them a crucial pillar to strengthen the activities and measures proposed in the GEP.

As stated by the European Commission, training is considered one of the eligibility criteria to implement a GEP within an organisation. Indeed, the EU recalls the EIGE's Gender equality training toolkit to clarify tools and strategies to increase people's awareness on gender equality.

In depth, EIGE identifies three key principles or, the so-called, *building block of training*, that should lead organisations in developing and delivering training, which are:

- to engage the whole organisation
- to assess training on evidence-based organisation needs
- to create an ongoing and long-term process

In order to guarantee the feasibility of the actions, it is important to identify:

- the office or the people in charge: the united guarantee committee, the dedicated unit for training the employees, the gender equality office (if present).
- the directed beneficiaries of the training (decision making managers and the general direction, researchers and technologists, administrative and technical staff)
- the involved human resources: selected trainers should be identified to set the training plan.
- the economic resources: a specific budget should be devoted to training activities.

The suggested actions for the provision and implementation of an integrated training offer in the Training Plan

- Identification of the training needs of structured and unstructured staff by means of the survey questionnaire prepared annually by the Training Office (March 2022) on the following topics:



basic concepts of gender equality and gender stereotypes; design, methods and techniques for the implementation of a gender plan, the gender dimension in research projects in the STEM and SSH disciplines

- Identification of trainers and trainers inside the Agency for the implementation of the courses through a special expression of interest.
- Implementation of a system of accreditation/ reward for participation in the courses.
- Annual planning of the release of courses.

Indeed, following a “chain” process, gender equality competences can be acquired delivering specific learning training, the so-called, Train-of-Trainers, that enable organisations to guarantee the sustainability of the educational training in the long perspective.

Gender equality training programme comprises a wide range of educational tools and processes, such as: face-to-face training; staff induction programmes, online modules, guidance materials and compendia of resources, networks for sharing expertise.

According with this, MINDtheGEPs project foresees two training laboratories: the Empow_Lab and the Breaktop_Lab. The Empow_Lab: *Empowering laboratory* aims at designing and putting into practice (WP4) appropriate *trainings for junior researchers* (especially for women) *at the beginning of their career* in order to support their career progression through reinforcement of their skills in conducting research. It considers also junior male researchers and it will be addressed to PhD students, post-docs and temporary assistant professors in academia or to women at the beginning or in the middle of a career in non-academic RPOs, in order to reduce the *leaky pipeline* phenomenon. The Breaktop_Lab: *Increasing gender awareness and breaking down stereotypes at the top* aims at deconstructing stereotypes in selection processes by creating “awareness” about the gender gaps in all phases, from the recruitment, promotion, decision-making and research programmes to financing. This laboratory will be addressed to all male and female associate and full professors in academia or all male and female senior positions in non-academic RPOs.

5. List of possible indicators by the 5 key areas

Based on the evidence coming from the initial assessment (see par 5.1), each thematic area is composed of several objectives to be achieved through realistic and targeted actions in order to foster a structural and cultural change within the organisation. Such objectives and actions must be **SMART** (Doran, 1981):

- **Specific.** The objectives and actions should answer the following basic questions: what, why, how, who, when and where.
- **Measurable.** Establish quantitative and qualitative indicators and respective targets to be able to check the achievement of objectives.
- **Attainable.** Make sure the objectives and actions are not out of reach and that they can actually be achieved (even if requiring more effort).



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- **Realistic.** Ensure that the objectives and actions are relevant to the organisation and that they are feasible within a certain time frame and within the available human & economic resources.
- **Time-related.** Indicate when the objectives and actions can be achieved.

In this section follows a list of possible indicators to take into consideration in order explore the key areas discussed above

KA1: Decision making bodies: gendering leaders and institutions

- Number of training on gender equality, stereotypes and implicit bias settled
- % of participating females, non-male individuals in general, and males in trainings on GE
- % of groups' discussion promoted
- Existence of gender equality guidelines or guiding principles
- Number of policies aiming at achieving change toward gender equality (boards, bodies, committees, researchers, etc.)
- Online platforms/websites to communicate initiatives linked to the gender equality and diversity policy of the organisation.
- Other communication/diffusion means: social networks, websites, newsletters, etc.
- % of Training on how to tackle the permissive climate toward gender harassment
- % of psychological assistance courses to elicitate reporting formally,
- Existence of clear sanctions against offenders
- Guidelines and code of conduct available
- Code of conduct made public
- Creation of a figure/role of gender and diversity coordinator that refers to top decision bodies
- Creation of a figure/role of gender and diversity coordinator that refers to top decision bodies
- Analysis of the status quo among researchers (see Gender Budget)
- Provision of sex disaggregated data in periodic report
- Dissimilarity Index
- Gender Pay Gap
- Gender Wage Gap
- Remuneration of the top 10% researchers in the public sector by gender
- Number of times a website is updated (date of the last post, etc.)
- Number of strategies to maintain gender balance in decision making processes
- Increasing women presence in boards and in evaluation panels
- Routinely workshop to raise awareness
- Systematic annual collection of gender-sensitive statistics
- Analysis of researchers needs through focus groups, world café, etc. (evaluation how effective are existing measures)
- Regular workshops on gender in research
- Effective information of training courses for mentees through social media

KA2: Balancing recruitment and career progression

- Availability of a guide on Transparent and fair selection criteria
- Share of women/men among successful main applicants
- % of women in selection committees



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- Share of men and women among person recruited
- Measuring glass ceiling index*1
- Establish a well-settled dissemination of competition and job offering position
- Success rate for women and men applicants*2
- % of women responsible of European project
- Share of women and men among reviewers
- Share of women and men among heads of departments
- Share of women and men in funding decision making bodies
- Promotion of turnover policy for directors of department ensuring the alternation men/woman
- Number of positive discrimination strategies settled in job offering
- Regular statistic indicators of career paths of young researchers
- Tailored mentoring (from different research groups to protect privacy)
- Peer to peer mentoring for female (students and pupils also)
- Support to women researchers to achieve fellowships and to continue PhD path
- Increasing number of women's publication by special mentoring
- Regular workshops dedicated to academic writing

KA3: Gendering research and teaching

- Personnel satisfaction rate among researchers
- Number of beneficiaries of specific working facilities
- Send periodic questionnaire specifically tailored to analyse needs and expectations in terms of parental leave
- Standard and clear procedure for parental leave
- Wide dissemination of the parental leave policy through updated website and internal publicity
- Number of "open days" institutionalised during a year and % of the participants by gender
- Number of events like "children with mum and dad at work" (two times/year)
- Provision of services for work and private life conciliation
- Routinely counselling contacts with parents during parental leave
- Providing rooms for breastfeeding/milk pumping/nappy changing, (space for pregnant women, Ramadan hours, etc)
- After-school space to children of employees aged 11 to 14 (reading room, possibility of borrowing books, possibility to access internet, etc.)
- Summer camp for wide age range and long time (e.g. children aged 5-14, time up to 17:30 hour)
- Flexible working hours parents
- Increasing availability of telework
- Implementing options for work from home in first 20 week after child's birth (> paid parental leave)
- Provision and diffusion of a Career support scheme (before, during and after parental leave)
- Publishing on the institute's website a clear policy on work-life balance
- Dissemination of measures have took/have been implementing in supporting work-life balance



KA4: Improving work-life balance

- Number of scientific articles questioning about gender equality in research (from universities and from researchers)
- Number of PhD students who foresee a section in their thesis concerning gender issues
- Number of assigned post-doc research fellowships for gender studies
- Number of meeting for GEPs implementation
- Availability of guides, trainings, workshops, on integration of equality in curriculum design as a teaching and learning support for staff
- % of research projects including gender analysis in the content of research
- Number of workshop by years for people participating in evaluation of research proposal and % of participants,
- Analysis of the research funded proposals (how gender plays a key role in the proposal)
- Amount of dedicated budget for gender equality dimension
- Share of funded and coordinated projects, by gender
- Remuneration of the top 10% young researchers (25-34) by gender
- Average remuneration of researchers compared with non-researchers at various career stages by gender
- Average remuneration of young researchers (25-34) compared to non-researchers by gender
- Negotiated starting salaries by gender and job grade for ge in the non-academic research sector
- Regular workshops dedicated to grant and project application writing
- Regular trainings for mentors
- Skills training (negotiation, funding, management, leadership).

KA5: Gender-based violence

- Availability of a formal code of conduct
- Formal procedures to report an abuse or a sexual violence
- Presence of a dedicated personality e.g. counselling service

6. Monitor and evaluate progresses at the organisational level

In this section are presented two paragraphs devoted to the presentation of:

- Basic concepts of the EU framework and references to some EU projects for M&E of the GEPs at organisational level (6.1)
- Hints about the central M&E system within the MINDtheGEPs project (6.2).



6.1. Basic concepts of the EU framework and references to some EU projects for M&E of the GEPs at organisational level

Monitoring and evaluation are an **integral part of the GEP**. As a policy that aims at structural and cultural change within the organisation, the GEP must be able to be concretely assess its effectiveness. Having a monitoring and evaluation strategy makes it possible to closely monitor and support the GEP's progress to **increase its impact**. Additionally, in order to be eligible for Horizon Europe, 'it is mandatory that organisations collect and publish disaggregated data on the sex and/or gender of personnel (and students, where relevant) and carry out annual reporting based on indicators' (see [Horizon Europe Guidance on Gender Equality Plans](#), pp. 23–27). While the annual report is an activity that is carried out after the implementation of actions, **the monitoring and evaluation strategy must be planned and designed in advance and internally within the GEP architecture**. A detail dissertation can be found at the "[Monitoring progress and evaluating a Gender Equality Plan](#)" webpage of the GEAR tool, while here only the fundamental concepts are reported.

Monitoring and evaluation basic concepts

To develop an effective monitoring and evaluation strategy, it is useful to recall here the definitions and differences between the two terms. According to the definitions used by the [gender equality monitoring tool](#) (pp. 3-8) of the EU project 'Taking a reflexive approach to gender equality for institutional transformation' (TARGET),

Monitoring is a continuous process, in which data is systematically collected in order to provide management and key stakeholders with regular updates on the progress and achievement of objectives and the use of allocated funds

while

Evaluation relates to a systematic and objective assessment of an ongoing or completed project, programme or policy based on the monitoring data, providing lessons learnt for the planning of future measures.

The two aspects move jointly: 'Monitoring ensures that the right thing is done, while evaluation ensures that the right outcomes are achieved' (TARGET gender equality monitoring tool, p. 3), but their specific targets differ: the monitoring targets focus on the implementation level, i.e., the GEP actions and related outputs, while the evaluation targets focuses on the strategic level, i.e., the impact or outcome the GEP wish to achieve. Based on these definitions, the two concepts have two different **timeframes**: monitoring is carried out on an ongoing basis by recording the progress of each action and summarised in the annual report, while evaluation (which requires a more in-depth level of analysis) is carried out at the end of the GEP lifecycle.

The monitoring and evaluation strategy

Monitoring starts with the **indicators selected** to observe whether and how the actions envisaged in the GEP have been carried out. In addition to the information coming from the individual offices or bodies that are in charge of carrying out the actions of the Plan, much information may come from the databases used to carry out the initial assessment, so as to integrate the various sources and get as



thorough a picture as possible. To do this, it may be useful to set up **monitoring sessions** with the offices and bodies connected to the Plan, both to reduce their workload and to engage them more closely and have them feel part of the change. For getting inspired, the following resources suggest a set of indicators and methodology for setting up the own monitoring strategy: [the PLOTINA project](#), [the FESTA toolkit](#), and [the GENERA PAM tool](#).

In order to create and evaluation strategy, the steps are quite similar. In addition, it is important to consider the **context** in which the GEP operates, i.e. the organisation itself (already analysed in the initial assessment), as well as the results of all monitoring reports carried out: starting from the latest Gender Budgeting available, accompanying the monitoring reports and supplementing the information with qualitative techniques (e.g., focus groups or interviews with particular targets within the organisation) can enable the assessment not only of the performance of the actions but above all of the impact they have had at a structural and cultural level.

Results communications

As highlighted above, the communication, the results and thus the evaluation of the GEP is an **essential part** of the (potential) structural and cultural change. It is important to **disseminate** both the annual reports and the final evaluation through official documents and on the organisation's website in accordance with the principles of transparency and accountability; to regularly update the organisation's **top management** on the progress and/or difficulties experienced (potentially also with ad hoc meetings) in order to make them part of the change process; to share the progress and final evaluation with **stakeholders** and **institutions**, in order to engage them in the organisation's activities and receive support for the measures adopted.

Finally, all the expertise acquired, i.e., data collection, negotiation with the organisation's bodies, implementation of actions, monitoring and evaluation will be the basis for the **new GEP lifecycle**, which will aim to improve on what has been acquired and to close remaining gaps.

6.2. The Monitoring and Evaluation System in the MINDtheGEP Project

In MINDtheGEPs, the process of monitoring and evaluation at the organisational level is coordinated with the general M&E system put in place for accompanying and supporting the whole process of implementation of the GEPs within the 7 Research organisations, foreseen under the WP7 and led by the supporting partner K&I. An Evaluation Plan (D7.1) is going to be set-up, in parallel with the detailed design of the ex-ante version of the GEPs (due in July 2022), by the central Monitoring and Evaluation Unit (MEU) led by K&I. The Evaluation Plan will be delivered on September 2022. In the Evaluation Plan main theoretical, methodological aspects and main M&E operational procedures and tools for monitoring and accompanying the process of implementation of the GEPs during the lifetime of the MINDtheGEP project will be presented. Tailored Monitoring and Evaluation Schemes (MES) will be arranged, considering the needs of change to address, activities selected and indicators and targets defined in each GEP.

The development of this M&E Plan is grounded on a long experience of implementation of M&E activities within EU projects focused on structural change to attain GE in research organisations



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(Prages, Stages, Whist, Trigger, Libra), on training (GE Academy) or more in general on system of evaluation and certification of GE (Casper). Furthermore, it will be based on a mutual agreement with the implementing partners (and with leaders and deputy leaders of the three operational WPs 4-5-6) and on a preliminary mapping of the existing M&E procedures and practices already in place in each institution.

In order to better dealing with the complexity associated with the process of structural change to attain Gender Equality in research organisation, in MINDtheGEPs the M&E activities adopted the approach of the “**Developmental Evaluation**” (DE), a concept first developed by Patton (2006, 2010). It involves long-term relationships between evaluators and project or programme staff. Evaluation is ongoing, which means that feedback can be provided continuously. Development evaluation is primarily designed to support learning and management decision-making and is particularly appropriate for programmes working in complex or uncertain environments and especially for projects or programmes that:

- Operate in uncertain situations, where the external environment is constantly changing
- Are concerned with innovation, replication or mainstreaming, where a key purpose of the project or programme is to assess what works and what doesn't, rather than following established pathways to change
- Require collaboration amongst many different stakeholders from different organisations or sectors.

Four important assumptions of developmental evaluation support the navigation of complex projects easily applied in participatory frameworks, as MINDtheGEPs GEPs and related processes of structural change are. In particular these assumptions concern four features to be adopted in the implementation of M&E activities:

- *Evaluation as a **proactive, support activity (non judgemental)***
- ***Evaluation as Non-linear** implementation process*
- ***The Iterative nature of evaluation**The Evaluator's **intermediate position***

M&E activities in MINDtheGEPs regards two levels:

- The level of single GEP (7 implementing organisations)
- The cross-cutting level (evaluation of the actions and training activities related to the specific topic trasversal to all the GEPs (WP4-WP5-WP6)

For each level it will be considered:

- the baseline of indicators to be used for a subsequent comparison at mid-term and at the project's end defined by each implementing organisation
- quantitative and qualitative data gathered and analysed in each implementing organisation will be gathered

Four main dimensions will be considered as criteria for assessing the GEPs:

- Effectiveness - (achieving the objectives)
- Relevance - dynamic nature, related to different dimensions of change and negotiation of it (interpretive, symbolic, institutional, operational)



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- Impact - “subjective” (consensus) and “objective” (short term changes)
- Sustainability - (change takes root in the organisation, with resources allocated)

In accordance with the developmental evaluation approach mentioned above, M&E will play a dual function of:

- Quality orientation (oversee the action flow, control compliance and respect of the main evaluation criteria)
- Problem solving orientation (Identifying and formalising obstacles during implementation; facilitate their mitigation)

The M&E activities in MINDtheGEPs will be aimed at supporting implementing partners by addressing substantive and methodological aspects of their activities (GEPs or WP activities), and in particular at:

- Helping the teams establish a detailed Plan of activities from which to draw tailored monitoring and evaluation schemes
- Overseeing the flow of actions to verify progress, assess the alignment of actions and outputs with expected results and impacts, identify obstacles and needs which may endanger the activities, and control those actions comply with the established deadlines
- Providing teams with support in devising appropriate strategies to attain intended impacts, in addressing constraints and obstacles, and in managing their impacts

Furthermore, M&E activities will be aimed at assisting the implementing partners in devising their own tailored self-evaluation methods and tools for the planned training activities.

Finally, M&E activities in MINDtheGEPs will be aimed at favour self-reflexivity through participative evaluation efforts.

The process of monitoring of the gender gap reduction and the more general complex process of structural change will be implemented through the following M&E **procedures/activities**:

- Identification, collection and regular monitoring of a set of quantitative & qualitative indicators of gender equality at implementing organisations
- At-a-distance monitoring sessions (through video-conferences) for each implementing organisation throughout the implementation phase of the project (2 per year on GEPs and 2 per year on transversal WPs, with the arrangement of a Monitoring session every three months)
- Administration of self-assessment tools for mid-term and final evaluation of the GEPs impact and sustainability of institutional change toward gender equality (eg. in-depth evaluation questionnaires; Casper Impact factor Tool)
- On-site M&E visits (at the end of every implementing period) at each implementing organisation, fostering a “participative” evaluation exercise with core teams and other key actors involved in the process of implementation of the GEP (one for each implementing period)
- Organisation of training on using monitoring and evaluation tools with project meetings, involving all implementing organisations (2 Train of trainers workshops and other Project meetings)



For the implementation of the M&E activities, the central MEU will set up tailored M&E schemes (MES) for conducting regular M&E sessions:

- with each implementing organisations (2 sessions per year on the implementation of each GEP)
- with the partners leading the three operational transversal WPs (2 sessions per year of implementation), possibly also opened to other relevant partners or actors (eg. trainers) when necessary.

7. Recommendations to set targets and monitor progresses at the organizational level

This paragraph presents a list of the recommendations considered crucial in the process of implementing a GEP. They represent objectives to be reached and/or possible initiatives to take into consideration in the entire process of the development of a Gender Equality Plan.

The list below is the result of several activities conducted, mostly in the H2020 – Ri-Peers project where, in 2019 a SWOT analyse was conducted in order to identified a detailed list of actions suggested by partners (<http://ripeers.eu>). Hints and suggestions came also form the experiences of other European project such as GENERA, PLOTINA, MORRI

Accessing expertise

- Set up a working group experienced in gender equality matters, which may become a transformational agent
- Creating a stable connection and interaction with internal and external stakeholders
- Involving experts in the working group of GEP's implementing measures

Activate network

- To establish procedures to be more attractive for women, to contact them
- Organise boot camp or summer camp or entertainment event
- To be more visible and more competitive
- Entertainment and engagement space creation, Activities could be appointed under the frame of entertainment
- To create new groups networks, from internal and external staff
- Creation of a family-space coordinated by employees and families to support each other and to trigger interaction amongst employees

Excellence and promotion

- To involve leadership
- To encourage junior women researchers to give a talk
- Promoting talks and seminars by females (scientists, industry)



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- To organise a preliminary meeting to identify and encourage female speakers; to select them, adopting criteria such as motivation, charisma, and public speaking experience

External backing

- To strengthen the network and the opening of a space of interaction and exchange among researchers for each institution
- To activate and mobilise networks from the outside such as association or specific network on GE
- To stimulate the involvement of the reluctant staff in taking an active part in the internal seminars
- To have external backing and to strength the network nearby
- To promote a favourable climate toward gender equality

Communication

- To disseminate and promote activities through researchers
- To enhance the communication and the dissemination of the results of the activities implemented, printing brochures or organising public events in order to increase the visibility of the results achieved
- To integrate at special talk (e.g. opening session with Rector) also a woman speech
- To be more attractive for young early career researchers/students with a more youth-friendly communication

Involvement of all staff (not only women)

- To get the support of the all component of the organisation
- To gain the active engagement of all the staff (men and women), essential to debunk the belief that gender equality is only a women's affair

Management involvement

- To involve management as much as possible especially concerning the follow up of the action and about how important challenges you are experienced

Mentoring

- The organisation and planning specific mentoring sessions concerning gender equality enhance and promotion self-efficacy and self-conscious among young researchers
- To embed mentoring measures that would help early career stage researchers, to “survive” into the highly competitive research market, to provide to both mentors and mentees skills that would increase opportunities for the latter
- adopting innovative approach for mentorship, reshaping old-fashioned and ineffective existing model.



Raising awareness on GE topics

- To set activities and workshops aiming at raising awareness
- Training and activities should be prioritised in order to convey the major number of participants as possible to few seminars/trainings in order to maximise the impact
- To think about working groups focused on special issue, better to work with smaller groups
- To settle an internal group of discussion for preventing sexual harassment and discrimination, which should be not only focused on SH, but in GE issues in general. It is highly recommended the presence of a person officially in charge.

Reputation building

- To disseminate events and to involve employees
- To involve stakeholders from the outside, role models as a flagship, as well as motivational seminars, should preferably be held by someone outside the institution in order to avoid bias
- Food and drink could be introduced to motivate the participation of employees in training and other activities

Sustainability of the measures

- Empirical evidence from gender disaggregated data should be provided
- Embrace an anti-harassment legal policy, such as a code of conduct, could be useful to the reinforcement of the proper behaviour

Transformational culture

- It starts from the communication and includes a huge awareness campaign addressed to both side: to women and to men
- Transparency in the recruitment process
- To hinder the name of the candidates producing a gender blinded list
- To prepare a set of questions and categorise persons based on the skills and the competences.
- To ask women to apply more, set up a-priori the same number of the female applicants as the male ones

Work-life balance

- To promote an environmental climate that allows people to work part-time or to bring kids to work as well for women as well as for men, without affecting career promotion. This could help in changing the culture, you can write a leaflet for work life balance suggestions
- To consider also measures and actions that do not need considerable financial resources (agreements with kindergarten; part-time, teleworking)



8. Conclusion

European Commission considers, since decades, Gender Equality as a key priority of the European Research Area. Accordingly with the criterion of the Horizon Europe Guidance on GEPs, one of the main challenges of this deliverable is to provide actions to support research organisations to implement Gender Equality Plans as drivers for institutional structural changes in seven research organisation (UNITO, CNR, UJ, UG CTAG, ETF, ITT). This deliverable, as output of the MINDtheGEPs project has been developed to serve as a useful guide for implementing partners ant to answer to their needs, goals and concerns. Research organisations can address one or all the identified areas and find for each one the appropriate indicator to reach and measure their objectives

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