



EQUAL4EUROPE

GENDER EQUALITY PLANS

Toolkit for adopting Gender Equality Plans in AHMSSBL research institutions

WP6

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ABBREVIATIONS AND ACRONYMS

AHMSSBL	Arts, Humanities, Medicine, Social Sciences, Business and Law
EIGE	European Institute for Gender Equality
ERA	European Research Area
EU	European Union
FESTA	Female Empowerment in Science and Technology Academia
GEAR	Gender Equality in Academia and Research
GENERA	Gender Equality Network in the European Research Area
JTN	EIGE's Journalist Thematic Network
PLOTINA	Promoting gender balance and inclusion in research, innovation and training
S&T	Science and Technology
SAGE	Systemic Action for Gender Equality
SMART	Specific, Measurable, Achievable, Relevant and Time-oriented
STEM	Science, Technology, Engineering and Math
TARGET	Taking a Reflexive approach to Gender Equality for institutional Transformation
TCD	Trinity College Dublin



1. INTRODUCTION TO GENDER EQUALITY PLANS

Promoting institutional change, removing the obstacles to gender equality in the research system and increasing the participation of women in research and science, is a strategic challenge for the European Union. In 2012, the European Commission indicated **Gender equality and gender mainstreaming in research as key priorities for the European Research Area (ERA)** ([European Commission, 2012](#)). Despite a certain improvement was achieved in recent years, the underrepresentation of women, and the consequential loss of talent, still persists.

Therefore, in 2020, the European Commission, detailing its new strategy for the ERA in Research and Innovation, confirmed the central role of gender equality, identifying **Gender Equality Plans** as an important tool to achieve the goals pursued ([European Commission, 2020a](#)).

In general terms a Gender Equality Plan is a **public document, addressed to the entire workforce of a private or public organization, which sets «corrective measures, designed on the basis of a diagnosis of the situation and aimed at achieving, in a given company or institution, equal opportunities between women and men, eliminating sex-based discrimination»** ([GEARING ROLES, 2020](#)).

A Gender Equality Plan is, thus, a detailed plan defining strategies, objectives, and measures, adopted after a diagnosis of the situation, to fulfil **two objectives**: (i) correct the gender biases or sex-discriminations existing in the organization and (ii) guarantee equal treatment and equal opportunities for women and men. Gender Equality Plans also include a monitoring process to control and assess the results of its implementation.

In essence, the process of adopting a Gender Equality Plan, which precedes its implementation, has three general phases:

1. **Diagnosis of the situation of gender equality** in the institution, conducted through the collection of quantitative and qualitative data. The diagnosis is the baseline for the adoption of the Gender Equality Plan and for defining specific objectives and measures. This first phase includes also all the preliminary steps necessary for adopting the Gender Equality Plan, including gathering information regarding the institutional context and regulatory framework and setting-up the Equality Committee or Team in charge of elaborating the Gender Equality Plan.
2. **Adoption of the Gender Equality Plan.** The contents of a Gender Equality Plan articulate the strategic view of an organization to achieve gender equality. The plan must be specific and sustainable for the context that it is addressing, organized in objectives and concrete measures to reach them. In this sense, there are not two Gender Equality Plans identical to each other. The scope, the objectives and the measures contained in each Gender Equality Plan depend on the existing situation of gender equality in that specific institution, the approach chosen to deal with the situation and the available expertise and resources.
3. **Monitoring and adjusting.** While designing a Gender Equality Plan, also monitoring and adjusting instruments must be set-up. Monitoring instruments are those allowing to check the impact of objectives and measures in the institution, after a certain period from their implementation. They consist of specific indicators to assess the impact of the Gender Equality Plan, of a schedule of assessment sessions and of the drafting the related assessment reports. The latter should register the achievements reached and provide



for a critical analysis of what did not work as expected, and/or about the obstacles encountered. Adjusting is a consequence of monitoring and it entails including in the Gender Equality Plan a proceeding for its revision, while it is ongoing, to address the issues emerged during the monitoring.

A Gender Equality Plan is usually the result of a negotiation, involving the team who developed the plan, high management of the institution and, in some cases, the most relevant actors and stakeholders. It is advisable (in some countries it is even a legal requirement) to involve workers' representatives in the development of the Plan.

The **design and development of a Gender Equality Plan** should, therefore, fulfil the following requirements:

- Consider the results of the diagnosis on gender equality formerly conducted in each higher research institution, using the identified areas of intervention and SMART objectives as starting point for the development of the Gender Equality Plan.
- Involve in the elaboration of the Gender Equality Plan high management of the institution, as well as all relevant actors and stakeholders.
- Define sustainable and feasible objectives, measures, and timelines to address the gender bias identified in the higher education institution and guarantee equal treatment and opportunities for women and men.
- Identify indicators and a monitoring and reporting system to assess the implementation and impact of the Gender Equality Plan and the measures included therein.

Following is a **Toolkit for adopting Gender Equality Plans in research institutions in the field of Arts, Humanities, Medicine, Social Sciences, Business and Law (AHMSSBL)**. Learning from other EU funded projects that have elaborated documentation and toolkits to set up a Gender Equality Plan in research institutions, in some cases specifically designed for the field of Science, Technology, Engineering and Math (STEM), the EQUAL4EUROPE project addresses the more unexplored topic of gender equality in research institutions in the field of AHMSSBL, developing a toolkit that focuses on designing and developing a Gender Equality Plan for research institutions in the field of AHMSSBL.

The toolkit is divided in **four sections**. The first one provides general indications regarding the preparatory steps that should be taken before designing a Gender Equality Plan. The second focuses on the designing and development of a Gender Equality Plan, addressing the different sections of the Gender Equality Plan and providing guidelines to structure their contents. The third section is dedicated to monitoring and adjusting, dealing with the ongoing assessment of the impact of the Gender Equality Plan in the institution, the proceedings to adjust it to the result of this assessment and to internally resolve possible disputes which might arise. And, finally, the fourth section is centred on gender equality standards in AHMSSBL research institutions and provides a list of best practices, tools, and recommendation for achieving a sustainable cultural and institutional change in three key areas of intervention: (i) removing barriers to the recruitment, retention, and career progression of female researchers; (ii) addressing gender imbalances in decision-making processes; and (iii) integrating the gender dimension in research and innovation content.



2. PRELIMINARY STEPS TO ADOPT A GENDER EQUALITY PLAN

The adoption of a Gender Equality Plan in a higher education institution is a complex process, that requires different phases and steps. Most of the focus is generally on the designing phase, where the objectives, actions, and measures of the plan are determined. Nevertheless, there are **preliminary steps and activities** that are fundamental for successfully adopting a Gender Equality Plan.

After the diagnosis of the current situation of gender equality in the institution, considering both quantitative and qualitative measures, the next steps in designing a Gender Equality Plan are:

1. Set-up the Equality Committee or Team which will lead the negotiations and carry out the necessary activities for the Gender Equality Plan.
2. Engage key stakeholders in the process of adopting the Gender Equality Plan, using a participatory approach. That is, all relevant stakeholders, from top to bottom of the organisation, and across departments and schools, should be actively involved in the designing and in the implementation of the Gender Equality Plan.
3. Obtain knowledge of the regulatory framework regarding Gender Equality Plans in each higher education institution and the legal requirements applicable in the country where the institution is based.
4. Obtain knowledge of the institutional context, using the diagnosis on gender equality as a starting point.
5. Impulse the negotiation process, taking the necessary formal steps to carry out the negotiations of the Gender Equality Plan in an adequate and reasonable timeframe.

In the following sections, each of these preliminary steps is described more in detail, to provide clearer guidelines on how to carry out the adopting of a Gender Equality Plan. Nevertheless, it should be remembered that every institution is unique and, therefore, these guidelines shall be tailored according to the specific characteristics of each organization.

2.1. SET-UP THE EQUALITY COMMITTEE OR TEAM

An important preliminary step essential for the adoption of the Gender Equality Plan, is to **set-up an Equality Commission or Team**.

The Equality Commission or Team is a temporary working group which coordinates the process of adopting a Gender Equality Plan, carrying out the diagnosis of the situation of gender equality in the institution, fixing objectives and targets, elaborating the Gender Equality Plan, monitoring progress, and dealing with the engagement and support from key stakeholders ([SAGE, 2016](#)).

Following is information regarding the **composition and tasks** of the Equality Commission or Team obtained from the results of other EU gender equality projects, such as EIGE ([2016a](#)) and GENERA ([2017](#)):

- The **composition** of an Equality Committee or Team should:



- Reflect the **participatory approach**, involving all relevant actors and stakeholders, as active members or advisors (see section 2.2.)
 - Be **mixed**, in terms of disciplinary background, positions within the organisation and experience.
 - Be **gendered balanced and diverse**.
- The **main tasks** of the Equality Committee or Team are:
 - Liaising with all gender relevant offices/departments in the organisation.
 - Ensuring support for gender policies by key stakeholders of the institution.
 - Taking all the steps to prepare the ground and impulse the negotiation process of the Gender Equality Plan in the organization.
 - Lead the designing and implementation process of the Gender Equality Plan in the organization, applying the guidelines provided by this toolkit and adjusting them to the specific context.
 - It is advisable that the Equality Committee or Team appoints a **manager or coordinator** among its members, who will act as a key driver coordinating all activities, guiding and supporting the whole GEP team and managing the adoption of the Gender Equality Plan.

2.2. ENGAGEMENT OF KEY STAKEHOLDERS: PARTICIPATORY APPROACH

Engagement of key stakeholders is a paramount step in any effort towards gender equality, that is mainstreaming the gender perspective into policies, programmes and projects of a complex organization and it is essential for achieving a sustainable cultural and institutional change.

According to EIGE, the potential of gender planning -like a Gender Equality Plan- to challenge gender social roles and the unequal distribution of resources and power, is greater if key stakeholders -individuals and groups potentially affected by the intervention- are involved, and if their participation is taken into account in the different stages of the policy cycle, with particular reference to design, elaboration and monitoring ([EIGE, 2018](#)).

In this sense, EIGE recommends introducing a **participatory approach to gender planning**, to involve all relevant actors and stakeholders in the adoption of a Gender Equality Plan ([EIGE, 2018](#)). In higher education and research institutions, this includes involving high management, middle management, academic staff, administrative staff and students in the process of elaboration of the Gender Equality Plan ([EIGE, 2016b](#)).

- ➔ **Useful tool:** in some cases, interactive initiatives are the best way to raise interest in gender equality issues, and to kick-off a debate which might foster stakeholders' engagement. The GENOVATE project developed a [Gender and Diversity toolkit](#) containing suggestions and examples about interactive events and activities which may contribute to this effort.

The participatory approach might provide benefits to the effort to gender mainstreaming through a Gender Equality Plan, like, for example:



- Improve the possibilities to identify the problems, needs and expectations of women and men affected by the Gender Equality Plan.
- Ease access to resources needed to design and implement the Gender Equality Plan, including information to carry out the diagnosis on the situation of gender equality in the institution.
- Increase the effectiveness and efficiency of policies and measures adopted in the Gender Equality Plan through the involvement of affected parties.
- Mainstream gender equality in the institution, creating a favourable environment for sustainable cultural and institutional change.
- Prevent and manage risks, unexpected results and conflicts, for instance oversimplifying the data collection phase to monitor and assess the implementation of the Gender Equality Plan would not satisfactory.
- Ensure commitment of the institution lasts in the medium-long term to the Gender Equality Plan and the objectives and measures included.

In any case, the form and terms of the participation of the relevant stakeholders and of their contribution should be agreed during the early stages of the process of adopting a Gender Equality Plan, from regular meetings to actively participating in the Equality Committee or Team.

→ **Useful tool:** The EQUAL4EUROPE consortium developed the specific toolkit “Engaging stakeholders and tackling resistances to mainstream gender equality in AHMSSBL research institutions”. It provides guidelines about the engagement with key stakeholders to set-up a Gender Equality Plan. More specifically, the toolkit:

- Identifies who are the key stakeholders, and the reasons to involve them.
- Analyses the main strategies for the engagement with all the categories of stakeholders, indicating also additional tools useful in this context.
- Addresses the obstacles which could prevent the engagement with key stakeholders in AHMSSBL institutions, suggesting strategies and actions that can help overcoming resistances.

In this view, it can be a useful resource to prepare the first steps to set-up a Gender Equality Plan.

2.3. OBTAIN KNOWLEDGE OF THE REGULATORY FRAMEWORK

When setting-up a Gender Equality Plan, gathering **information on the regulatory framework regarding Gender Equality Plans in the higher education institution and the legal requirements applicable in the country** where the institution is based is an essential preliminary step.

The regulatory framework can impact on the objectives or measures which should be included in the Gender Equality Plan, it can indicate how it has to be adopted or which actors must be involved.



This step may also represent an interesting opportunity to obtain high and middle management's **engagement and commitment** for gender mainstreaming in your organization.

Therefore, having knowledge of the rules applying to Gender Equality Plans at different levels allows to:

- Understand the substantial and procedural contents that Gender Equality Plans must follow to be introduced in your higher education institution.
- Shape your Gender Equality Plan in order to get additional incentives or funds for its implementation.
- Collect information about the minimum gender equality requirements that, although not mandatory in a legal sense, are necessary to allow your higher education institution to obtain funds or any other recognition.

The **regulatory framework for Gender Equality Plans** might be set at different levels, which must all be taken into consideration.

- **EU level**

European Union shows a long since commitment towards gender equality in research and innovation. The EU legal framework establishes the objectives to foster an institutional change. Already in 2012, the European Research Area ([European Commission, 2012](#)), has set as objectives:

- Gender equality in scientific careers.
- Gender balance in decision-making.
- Integration of the gender dimension into the content of research and innovation.

More recently¹, there has been **an important change in the eligibility requirements for Horizon Europe funding opportunities**, including the need for public bodies, research organisations and higher education institutions to have a Gender Equality Plan with mandatory process-related requirements and addressing recommended thematic areas ([Horizon Europe, 2021](#)) (see section 3.4.1.).

Further sources of information about EU regulatory framework about Gender Equality Plans:

- The EU Commission webpage on [The Commission's gender equality strategy](#), which provides a wide and updated overview of the legal requirements concerning gender equality in research and, specifically, Gender Equality Plans.
- The 2015 [Conclusion of the Council of the European Union on Advancing Gender Equality in the European Research Area](#).
- The section of the GEAR tool dedicated to the [EU objectives for gender equality in research](#).

¹ Also, action 12 of the EU Commission Communication on the European Research Area of 30 September 2020 ([European Commission, 2020a](#)) asks the EU and EU Member States to develop concrete plans for the promotion of gender equality in science, research, and innovation. At the same time, the Gender Equality Strategy for 2020-2025 ([European Commission, 2020b](#)) manifested the commitment of the EU Commission to introduce new measures to strengthen gender equality in the research funding program Horizon Europe, included the possibility to require a Gender Equality Plan from applicants.



▪ National level

The **national regulatory framework may contain specific provisions regarding Gender Equality Plans** and its proceeding to design or approve its contents. They can be **mandatory rules** that the higher education institution must respect, or **guidelines, recommendations or best practices**. As a result, before starting the process of adopting a Gender Equality Plan is always important to obtain knowledge of the national regulatory framework, to detect relevant provisions.

This point might be an interesting opportunity to **engage administrative staff in charge of people management**, who might have such knowledge and/or the expertise to access it.

In this view, some key tasks that should be conducted are:

- Identify the relevant national regulation regarding or related to gender equality in the workplace and, if existing, in higher education institutions to learn the mandatory rules that must be followed when adopting a Gender Equality Plan.
- Identify institutional and governmental websites dealing with gender equality in the workplace and, specifically, gender mainstreaming in education and research for interesting guidelines, recommendations or best practices.
- Learn in detail the necessary steps to adopt a Gender Equality Plan, including what documents are required to impulse the proceeding, if it is mandatory to set-up a negotiating committee and which actors should be represented in it (specifically, what is the role of workers' representatives in the process of adopting a Gender Equality Plan).
- Use the information reported by the GEAR tool in the section about national [Legislative and policy backgrounds](#) (updated to 2019) for further assessment.

Note that, in some countries, **regional legislators** can pass regulations regarding gender equality. If this is the case, it is advisable to carry out a more in-depth analysis also of the regional regulatory framework.

2.4. OBTAIN KNOWLEDGE OF THE INSTITUTIONAL CONTEXT

In the process of adopting a Gender Equality Plan, it is also important to gather **knowledge of the institutional context of your institution**, including internal regulations and institutional governance.

The institutional context may become relevant from two different perspectives:

▪ Institutional policies and internal regulations

Higher education institution might have adopted specific policies concerning gender equality and Gender Equality Plans, which may concern the proceedings for the adoption of the plan or specific contents that must be addressed. A preliminary task to the adoption of a Gender Equality Plan is, therefore, to check if there are some internal regulations or policies that should be considered.



Useful information might be retrieved from:

- Gender Equality Body (if any).
- Human Resources Department.
- Academic or administrative staff involved in present or past projects or activities regarding gender equality that can have an internal impact on your organization.

▪ **Hierarchical structures and institutional governance**

Designing a Gender Equality Plan smoothly implementable in a higher education institution also requires a detailed knowledge of the **organization's hierarchical structure and institutional governance**.

Following the GENERA project ([GENERA, 2017](#)), the checklist below provides a practical guide on how to deal with institutional governance while adopting Gender Equality Plan:

- Understand what are the decision-making bodies which have a role in the process of adopting a Gender Equality Plan (if any), especially, in the final approbation.
- Get to know all the actors involved in the process of adopting a Gender Equality Plan, from high and middle management, workers' representatives (if the case) to administrative staff in charge of people management.
- Obtain knowledge of the internal procedure required to the final approbation of the Gender Equality Plan, if higher decision-making bodies must be involved and who are the key stakeholders who must provide their consent.
- Get to know which units and departments will be responsible for the implementation of the Gender Equality Plan and the different measures therein included.
- Obtain knowledge about internal policies regarding internal and external communication, to adequately plan a communication strategy of the Gender Equality Plan, important for creating gender awareness.

In order to obtain knowledge of the institutional governance it is important to rely on the experience of people that are or have been addressing issues related with gender equality. Some practical suggestions include:

- Ask advice and support of high and middle management already sustaining the introduction of a Gender Equality Plan.
- Ask support of researchers and other experts in gender equality in the institution and/or those who have knowledge and experience with its hierarchical structure and institutional governance.
- Examine the organisational chart to see which actors and decision-making bodies are relevant for the approval and implementation of the Gender Equality Plan.



- Obtain support from administrative staff in charge of people management to obtain the documentation regarding internal regulations and proceedings that might be relevant for the adoption of the Gender Equality Plan.

2.5. IMPULSE THE NEGOTIATION PROCESS TO ADOPT A GENDER EQUALITY PLAN

Finally, another important phase of the process of adopting a Gender Equality Plan is to **impulse the negotiation process in an adequate timeframe**.

The process of adopting a Gender Equality Plan can depend on the specific country or institution, dependent on the existing regulatory framework. Some organizations may have highly elaborated proceedings to start negotiations, other can leave autonomy to the Equality Committee or Team. Therefore, this stage depends on the good knowledge obtained regarding the regulatory framework and institutional context (sections 2.3. and 2.4.).

The following checklist summarizes the most common steps that, under different levels of formality, are common to most institutions. When giving impulse to negotiation, the following is advisable:

1. Inform all relevant decision-making bodies and relevant actors of the initiation of the process for the adoption of the Gender Equality Plan, including existing regulations or time restrictions, if any.
2. Set-up the Equality Committee or Team involved in the negotiations or process for adopting the Gender Equality Plan, formally registering its constitution, if necessary.
3. Elaborate a planification and schedule of the proceedings of the Equality Committee or Team and inform all members. In this sense, it is advisable to plan the following:
 - a. Formally constituting the committee.
 - b. Identify the main lines of action and main objectives of the Gender Equality Plan.
 - c. Fix an approximate end date for the adoption of the Gender Equality Plan.
 - d. Plan regular meetings of the committee, including meetings with decision-making bodies and stakeholders relevant to the adoption of the Gender Equality Plan.
 - e. Distribute tasks among the different members of the committee.
4. Register the minutes of each meeting, identifying all relevant agreements and decisions adopted.
5. Adopt the necessary measures to guarantee that the negotiation or adoption process of the Gender Equality Plan follows the established time frame. The chances of adoption of a Gender Equality Plan increase if the negotiations are carried out in an adequate time frame. Although this time frame usually depends on the internal situation and rules of each institution, some recommended practices in this sense may be to:
 - Set in advance a clear timeline for all the tasks which should be carried out by the Equality Committee or Team.



- Agree in advance, with all stakeholders, a timeline for negotiations. Since the length of negotiations can vary depending on the concrete situations, this timeline should be sufficiently flexible, but limited not allowing negotiation to continue indefinitely.
- Prepare to submit the proposed Gender Equality Plan to the corresponding decision-making bodies with sufficient time, allowing for time to review specific issues or measures.



3. DESIGNING THE GENDER EQUALITY PLAN

Designing a Gender Equality Plan implies integrating general principles and measures about gender equality in a structured organization, as a higher education institution.

A well-structured plan should be holistic and integrated in the organization, but also accommodate the specific context of the organization, considering the results of the diagnosis of the situation of gender equality.

A recommended **structure of the Gender Equality Plan** is the following:

1. Introduction.
2. Main conclusions of the gender equality situation.
3. Objectives of the Gender Equality Plan.
4. Action plan regarding gender equality.
5. Monitoring, reporting and evaluation.
6. Timeline of the Gender Equality Plan.
7. Dissemination strategy.

3.1. INTRODUCTION

The introductory section of the Gender Equality Plan is aimed to providing an overview and the essential information about the Gender Equality Plan adopted in the institution.

In this sense, with the aim of providing all essential information regarding the Gender Equality Plan, this first section should include the following information:

- What is a Gender Equality Plan and what is its objective.
 - ➔ **Useful example:** two examples of the preamble of a Gender Equality Plans are:
 - Preamble of the Gender Equality Plan of the [Autonomous University of Barcelona](#).
 - Introduction of the Gender Equality Plan of the [Uppsala University](#).
- Relevant national and/or regional legal framework.
- Process of negotiation, adoption, and implementation of the Gender Equality Plan, including, if this is the case, the parties that participated in this process.
- Date of entry into force of the Gender Equality Plan and period of application.
- Summary of the contents of the Gender Equality Plan, with a brief description of the main objectives, measures, and of its structure.



- Commitment of the institution towards gender equality, the integration of gender equality in the organisation and other relevant institutional forms of support of gender equality, including existing measures and bodies related with gender equality.
 - ➔ **Useful examples:** two examples about paragraphs describing integration of gender equality in a higher education institution are:
 - Section 1 of the Gender Equality Plan of the [University of Helsinki](#).
 - Introduction of the Gender Equality Plan of the [University of Vigo](#).

3.2. MAIN CONCLUSIONS OF THE GENDER EQUALITY SITUATION

The second section of the Gender Equality Plan has the main function of providing an **overview about the main conclusions of the diagnosis of the situation of gender equality in the institution**.

Therefore, in this section, the following information should be provided:

1. The main **results of the quantitative and qualitative analysis** of gender equality in the institution carried out in the diagnosis.

In general terms, the qualitative and quantitative analysis of gender equality in the higher education institution should include four steps ([EIGE, 2016c](#)):

- Collect and analyse quantitative data about the organization.
- Undertake qualitative primary data collection, through an online survey on topics like career paths, working conditions, training and education, conciliation measures.
- Review internal policies, measures and practices, to get knowledge of what has been already done in the organization, and what might be improved.
- Assess all collected data from a qualitative and quantitative point of view.
 - ➔ **Useful information:** note that reporting relevant sex-disaggregated data about gender equality in the organization is an eligibility criterion for Horizon Europe funding from 2022.
 - ➔ **Useful examples:** examples of thorough gender equality analysis in a GEP are those contained in.
 - The Gender Equality Plan of the [Autonomous University of Barcelona](#) (p. 10-19).
 - The Gender Equality Plan of the [Uppsala University](#) (p. 9-11).

In the context of elaborating a **diagnosis of the situation of gender equality in a AHMSSBL research institutions**, it is advisable to include the following data:

- Quantitative sex disaggregated data regarding teaching load, publications, participation in research projects as leading investigators, supervision of students.



→ **Useful tool:** [Gender Equality Index](#) developed by the EQUAL4EUROPE project, which provide a list of key-indicators for the quantitative analysis.

- Qualitative sex disaggregated data regarding the engagement with the field of research, the institution, reasons for pursuing a career in academia, etc.
2. The most important **gender equality measures** already implemented in the organization.
 3. The **main areas of intervention and the priority areas for intervention** already identified in view of the diagnosis.

3.3. OBJECTIVES OF THE GENDER EQUALITY PLAN

The **definition of objectives is a paramount aspect of a well-structured Gender Equality Plan**. The objectives of the Gender Equality Plan describe the main goals pursued, in which the more specific measures will be framed. In essence, they should “explain” the impact of the Gender Equality Plan in the organization.

When defining the objectives of the Gender Equality Plan, the following is advisable:

- **Link objectives with the Gender Equality analysis**

It is advisable to provide a list of the objectives of the Gender Equality Plan, showing their link with the results of the diagnosis of the situation of gender equality in the organization.

A solution to clearly show this link may be to include in the Gender Equality Plan, for each objective, the following table:

Objective 1. Promote recruitment of women faculty [example]	
Result of the gender equality analysis	GEP Objective
<ul style="list-style-type: none"> ▪ Low rate of women in academic staff positions. ▪ Low rate of women applying for academic staff positions. ▪ Low rate of women being hired as academic staff after the recruitment process. 	Promote recruitment of women faculty.

The table should be completed with the following information:

- In the section “Result of the gender equality analysis”, include the relevant results of the diagnosis that want to be corrected or addressed with the Gender Equality Plan. To avoid repetition, it is advisable present them summarized in bullet points.
- In the section “GEP Objective”, include the objective that, related with the prior results, wants to be achieved with the Gender Equality Plan.



▪ **SMART objectives**

It is advisable for objectives to be designed so they are specific, measurable, achievable, relevant and time-oriented (SMART):

- **Specific:** brief description of the content of the objective and the results of the work that must be done so that it is clear and observable.
- **Measurable:** include assessable terms when defining the objective, including quantitative measurements (for example, by fixing a percentage or frequency) and/or qualitative measurements (for example, in terms of accuracy or fulfilment with legal regulation). It is essential to identify how the impact of the different measures adopted in the Gender Equality Plan will be assessed in terms of achieving the objective.
- **Achievable:** objectives should be fixed considering the possibility of success in achieving such objective given the time frame, opportunity, and resources available, including budget. In this sense, list existing measures and available resources that will be used to develop the objective.
- **Relevant:** objectives should be aligned with the institution's mission and vision as well as any legal requirement. In this context, the new HORIZON EUROPE criteria regarding gender equality and any further legal requirement can be considered when defining the relevance of each objective.
- **Time-oriented:** objectives must include endpoints, with a specific timeframe or due date for their completion. A standard and recommended timeframe for objectives is 4 years. Nonetheless, any high education institution setting-up a Gender Equality Plan is free to adopt a longer or briefer timeframe, as well as to adopt differentiated timeframes for different objectives. It is important, finally, to also include middle checkpoints or milestones regarding specific tasks within the overall objective.

The SMART objectives of the Gender Equality Plan can be presented with a table (following is an example) or using bullet points.

Objective 1. Example									
SPECIFIC RESULTS		MEASUREMENT		ACHIEVEMENT			RELEVANCE		TIMEFRAME
		Quantity measures	Quality measures	Available knowledge, skills?	Available resources	Time constraints	Mission and vision	Legal requirements	
Final result	1.								
Specific results	2.								
	3.								
	4.								



→ **Useful information:** further information on how to structure objectives of the Gender Equality Plan can be found:

- [GENERA toolkit \(Step 3: Design\)](#).
- The [PLOTINA Library of Actions](#) also provides a list of objectives which can work as an example for the structuring of the GEP objectives.
- A clear description of the objectives pursued through a Gender Equality Plan is contained in the GEP of the [Uppsala University](#) (long and short term goals, p. 1-7).

3.4. ACTION PLAN REGARDING GENDER EQUALITY

The main section of the Gender Equality Plan will be dedicated to designing an **action plan regarding the promotion of gender equality in the institution**, including a description of all the specific measures adopted in the Gender Equality Plan.

When designing the action plan, it is advisable to follow these **recommendations** regarding (i) the content of the Gender Equality Plan and (ii) the description of the different measures.

3.4.1. HORIZON EUROPE ELIGIBILITY CRITERIA REGARDING GENDER EQUALITY IN RESEARCH INSTITUTIONS

The [Horizon Europe programme](#) will require, from 2022, as eligibility criteria to access funds, that the applicant institutions have a Gender Equality Plan, with specific characteristics. Given the relevance of these contents for further funding opportunities, it is highly recommended to include them in the Gender Equality Plans.

These requirements are:

- **Publish the Gender Equality Plan** in the institution's website. The Gender Equality Plan should be a public document signed by high management and disseminated within the institution. It should include a commitment to gender equality, set clear objectives and detailed measures to achieve them.
- Provide **dedicated resources** for the design, implementation, and monitoring of the Gender Equality Plan. These resources may include funding for specific positions, such as Equality Officers or Gender Equality Teams, or dedicated working time for academic, management and administrative staff.
- **Collect sex or gender-disaggregated data** as an evidence-base for the Gender Equality Plan. This data should inform the Gender Equality Plan's objectives, indicators, and evaluation of progress.
- Include arrangements for **monitoring the GEP implementation**.
- Organize **training and capacity-building** aimed, in particular, at developing gender competence and tackling unconscious gender bias among staff, leaders and decision-makers, establishing working groups dedicated to specific topics, and raising awareness through workshops and communication activities.



- Include measures addressing **some recommended thematic areas**: (i) work-life balance and organisational culture; (ii) gender balance in leadership and decision-making; (iii) gender equality in recruitment and career progression; (iv) integration of the gender dimension into research and teaching content; (v) measures against gender-based violence, including sexual harassment.

3.4.2. RECOMMENDED CONTENT OF THE GENDER EQUALITY PLAN

Content of a Gender Equality Plan for a AHMSSBL research institution should, although addressed to the entire workforce, include **specific measures for promoting gender equality in the academic career**.

Given the objectives of the European Research Area and the eligibility criteria to access funds of the Horizon Europe programme, measures should be structured around the following five areas and include the measures related with the following issues:

- **Area 1: Removing barriers to recruitment, retention, and career progression of workers and, specifically in the context of AHMSSBL research institution, female researchers.**
 - Recruitment
 - Career progression and promotions
 - Retention
 - Gender pay gap
 - Work-life balance and gender-sensitive organisational culture
 - Academic activity
 - Mentoring program
- **Area 2: Addressing gender imbalances in leadership and decision-making processes.**
 - Professional decision-making bodies
 - Academic decision-making bodies
 - Participation in recruitment and promotion committees
- **Area 3: Integrating the gender dimension in research and innovation content.**
 - Trainings or workshops
- **Area 4: Measures against sexual misconduct, gender-based violence and sexual harassment**

Following the European Framework Agreement on harassment and violence at work adopted in April of 2007, the following measures are recommended:

- Training and awareness of all staff.
- Declaration of zero tolerance regarding harassment and violence.



- Adopt a specific procedure to analyze harassment claims characterized by the principles of discretion, impartiality, speed in the investigation, disciplinary action against false complaints and the possibility to rely on external assistance.
 - Adopt disciplinary measures in cases of harassment and violence.
 - Offer support for the reintegration of victims to work.
 - Implementation through negotiation with workers' representatives.
- **Area 5. Raising gender awareness and engagement with stakeholders.**
- It is advisable to implement in the institute the figure of a Gender Equality Officer.
 - Continuous sex disaggregated data collection.
 - Organize specific training on the implementation of Gender Equality Plans directed to Gender Equality Officers, relevant management, and academic and administrative staff.
 - Engagement session with high and middle management.
 - Training on structural, organization and cultural change for all relevant stakeholders of the institution.
 - Continuous gender awareness raising activities for all levels of stakeholders, including students, administrative staff, research and academic staff, high and middle management, and external stakeholders.

3.4.3. DESCRIPTION OF THE MEASURES OF THE GENDER EQUALITY PLAN

A well-designed Gender Equality Plan should **explain in a clear and detailed manner the different measures** adopted to achieve the established objectives.

Specifically, the following are recommended:

▪ **Frame measures in the SMART objectives**

When drafting the different measures included in the Gender Equality Plan, particular attention must be paid to indicate the link between the SMART objectives and the measures adopted. It is important to indicate how measures are the instrument designed to achieve such objectives within the organization.

A suggestion is to adopt a graphical scheme reporting, where each objective is followed by a summary of the different measures, in bullet points, aimed at achieving such objective.

The measures linked to each GEP objective should be also ordered in terms of priority. The prioritization of measures is relevant, for instance, for the distribution of the resources available of the Gender Equality Plan. A working tool to prioritize the measures linked to a Gender Equality Plan is proposed by the TARGET project ([TARGET, 2017](#)):



	Low impact	Medium impact	High impact
Easy to implement			
Medium to implement			
Difficult to implement			

Note that this table is a working tool to help the Equality Committee or Team prioritize measures, that should not be reported in the Gender Equality Plan. Measures should be ordered according to their difficulty of implementation and impact in terms of gender equality in the organization. Time should also be introduced as a third criterion; that is, considering if a measure requires a short, medium or long period of time for its implementation.

Once the measures have been ranked according to these three parameters, it is possible to decide which ones to prioritize. For instance, a measure easy to implement, with a high impact in the organisation and implementable in a short time should be preferred, in terms of assigned resources, if compared with a measure difficult to implement, with a low impact and requiring long time for the implementation.

▪ **SMART measures**

Like the Gender Equality Plan objectives, measures should also be SMART (specific, measurable, achievable, relevant, and time-oriented), indicating the content of the measure, target group, indicators to assess its impact, department responsible and available resources, implementation timeframe, etc.

○ (S) – Specific

A measure is specific when its description clearly points out:

- The **content** of the measure, through a brief description.
- The **target** of the measure, that is the group or groups of stakeholders which will be addressed by the measure. In this frame, a measure can address a specific group of stakeholders, two or more groups or indistinctly to the whole organization.

○ (M) – Measurable

A measure is measurable when **specific indicators** are associated with it.

An indicator is defined as a «measurable variable used to represent an associated (but non-measured or non-measurable) factor or quantity» ([TARGET, 2017b](#)). Indicators can be either qualitative or quantitative.

It is advisable to include in the Gender Equality Plan a list and a brief description of the indicators that will be used to monitor and assess the impact of each measure.



→ **Useful information:**

- The [TARGET Gender equality monitoring tool](#) provides a useful introduction about monitoring the impact of the GEP and the utilisation of indicators to this purpose.
- The [PLOTINA Monitoring Tool](#) provides a list of 10 core indicators and 40 indicators in the field of gender equality, which can be a useful source of inspiration. An example, in the field of recruitment, retention and career progression, is the indicator “Applications versus shortlists and appointments for jobs on grade A, B, C, by gender”. It is aimed at assessing the measures to foster gender equality in the recruitment process, providing a formula which compares the percentage share of female and male applicants with the percentage share of women and men on the short list as well as appointed women and male for specific job grades (p. 29-31).

○ (A) - Achievable

A measure is achievable when the information provided in the Gender Equality Plan demonstrates that it can be achieved. As a result, it is important to identify the responsible department, team or person who will be responsible for implementing the measure, and the available resources.

- Responsible department, team or person

Indicating the department, team or person responsible for the implementation of a specific measure is not a purely formal task, but useful to demonstrate that each measure can be really integrated in the organization, and that it might have medium and long-term effects also after the implementation of the Gender Equality Plan.

- Available resources

It is advisable to include all available resources for the implementation of the Gender Equality Plan, including human and/or financial resources.

Since normally resources are scarce, EIGE suggests using already existing resources which might serve the implementation of measures ([EIGE, 2016d](#)), which usually requires a lower effort to the organization. For example:

- Organize gender trainings integrating them into an already existing training in the organization.
- Integrate gender specific measures in organisational strategic documents not directly linked to the Gender Equality Plan.
- Include provisions about gender balanced composition of panels in relation to already scheduled conferences.

○ (R) – Relevant

All measures should demonstrate to be relevant for objectives of the Gender Equality Plan and, specifically, the higher education institution.



○ (T) Time-oriented

Finally, each measure should include a forecast schedule for its implementation. When describing each measure, it is advisable to indicate:

- When the implementation is expected to start and, if applicable, end.
- Brief description of the implementation strategy for the measure, identifying, if applicable, middle checkpoints or milestones.

To provide a clear presentation of the measures composing the Gender Equality Plan, it is advisable for measures to be presented in a clear manner using a table (following is an example) or bullet points:

Name of the measure		
Specific	Content	Brief description of the content of the measure.
	Target	Stakeholder targeted by the measure (for example, high management; middle management; academic staff; administrative staff; researchers, students).
Measurable	Indicators	List and a brief description of the indicators that will be used to monitor and assess the impact of the measure.
Achievable	Responsible department	Name of the department, team, and/or person responsible to implement of the measure (a description of the reasons used for the assignment is advisable).
	Available resources	Available human and financial resources deployed to implement the measure, consider building on existing resources.
Relevant	Objective	Brief explanation of the relevance of the measure to achieve one of the objectives of the Gender Equality Plan.
Time-oriented	Timeline	Timeline for the implementation of the measure, identifying a start and, if applicable, end date.
	Implementation strategy	Brief description of the implementation strategy for the measure, identifying, if applicable, middle checkpoints or milestones.

➔ **Useful information:** comprehensive lists of measures divided per thematic areas, that may be used for inspiration for the Gender Equality Plans are available in the:

- [EIGE's GEAR action toolbox](#).
- [EQUAL-IST Toolkit](#).
- [PLOTINA's Drafting the Gender Equality Plan section](#).
- Section 3 of the [TARGET Guidelines to design customised GEPs](#).



3.5. TIMELINE OF THE GENDER EQUALITY PLAN

It is very important to include in the Gender Equality Plan a section with information regarding the **duration and timeline for the application of the Gender Equality Plan**, the entire Plan or of specific stages or measures.

The timeline of the Gender Equality Plan should include the dates for the following:

- Starting date of application of the Gender Equality Plan.
- Starting date and implementation period of each measure.
- Monitoring activities.
- Final assessment.
- End of the Gender Equality Plan (if applicable).

When drafting this chapter, consider the possibility to use a Gantt chart, table or bullet point list. In any case, it is important that the timeline for all measures is included.



3.6. MONITORING, REPORTING AND EVALUATION

A Gender Equality Plan is a complex instrument, composed of several objectives, many measures and addressing some key organizational issues. Therefore, monitoring and evaluation instruments are needed to check its progresses and, if necessary, introduce the appropriate adjustments.

This toolkit provides a brief introduction to monitoring, reporting and evaluation of Gender Equality Plans and related suggestions for further readings.

This section, hence, should include information regarding:

- **Periodical monitoring and evaluation of the Gender Equality Plan**

It is advisable to include a specific section regarding periodical monitoring and reporting of the Gender Equality Plan, with the aim of viewing the objectives and measures that have been already implemented and to identify when expected results have not been achieved, proposing alternative solutions or adjustments ([GENERA, 2017](#)).

The assessment should be conducted on a regular basis, reporting the results in a monitoring report.

→ **Useful information:**

- The EIGE's GEAR tool, in its [Step 5 \(Monitoring progress and evaluating a Gender Equality Plan\)](#), provides useful suggestions in order to implement a comprehensive monitoring scheme.
- The EIGE's GEAR action toolbox, in its section [Analytical measures, targets, indicators, monitoring and evaluation](#), contains references to instruments for implementing a monitoring systems and workable examples of monitoring.
- The [TARGET Gender equality monitoring tool](#) provides useful introduction about monitoring the impact of the Gender Equality Plan and the use of indicators to this purpose.

The Gender Equality Plan should set the guidelines for the periodical monitoring, and it is advisable to include the following information:

- Commitment to periodical monitoring and reporting of the implementation of the Gender Equality Plan, indicating the periodicity of such monitoring and reporting.
- Commitment to periodical data gathering to assess the impact of the different measures adopted, including the timeframe for such assessment.
- Criteria used to monitor, report and assess the Gender Equality Plan and the different measures included in the Plan.
- Department, body and/or person responsible for gathering the necessary information for the periodical monitoring, reporting and assessment.



- Department, body and/or person responsible for supervising such periodical monitoring, reporting and assessment, which can include the Gender Equality Officer or an Equality Committee.

■ **Implementation procedure and alternative dispute resolution**

It is recommended to include a provision in the Gender Equality Plan regarding an interpretation procedure and alternative dispute resolution.

In this sense, the following are recommended:

- Creation of an Equality Committee (if applicable, it can be the same committee that negotiated the Gender Equality Plan) or designate an existing body within the institution.
- Definition of the competences, which can include offering a binding interpretation in case of discrepancies about some contents of the plan; or conflict resolution in case of discrepancies regarding the application of the Gender Equality Plan.

■ **Proceeding to revise the Gender Equality Plan**

It is important to include in the Gender Equality Plan a section to revise the plan to add, reorient, improve, correct, intensify/lighten or, even, abandon specific measures or objectives.

The Gender Equality Plan may require a revision of one or more of its objectives or measures during its implementation when:

- The results of the periodical monitoring indicate the need to review the Gender Equality Plan to guarantee its impact.
- Significant changes occurred in the national regulatory framework regarding gender equality (for instance, a new legislation introducing some mandatory measures for the Gender Equality Plan that were not included in the original one).
- Significant changes occurred in the working conditions, due to external factors (for instance, the need to telework for most of the workforce during the pandemic).

The proceeding to revise the Gender Equality Plan will be highly dependent of the internal regulation of each organization and/or country. However, key aspects to report in this section may be the following:

- (Open) list of events which may lead to the revision of the Plan.
- Identification of bodies or people entitled to call for the revision process.
- Identification of bodies or people entitled to decide to start or not the revision process.
- Identification of bodies or people involved in the revision process, and details regarding the steps of the revision proceeding.
- Criteria for the final approval or rejection of the revised version.



3.7. DISSEMINATION STRATEGY

Finally, it is advisable to include a **dissemination strategy of the Gender Equality Plan**. When designing the dissemination strategy, the following actions could be included:

- **Publish the Gender Equality Plan in the institution's website**

The gender equality criteria of HORIZON EUROPE Program applicable from 2022 include the publication of the Plan, signed by high management, in the institution's website. The implementation section of each Gender Equality Plan should, therefore, explain how the Gender Equality Plan will be made public.

- **Information campaign among workforce**

The Gender Equality Plan should be disseminated among the entire workforce. In this sense, the strategy should identify different dissemination actions and channels of communication to inform workers about the Gender Equality Plan and specific measures adopted.

The information campaign should include ([GENERA, 2017](#)):

- How the whole organisation will be informed about the Gender Equality Plan.
- How the Gender Equality Plan will be made available for all the employees.
- Which actions and communication channels will be used.

- **Training on the implementation of Gender Equality Plans**

Trainings on the implementation of the Gender Equality Plan should be organized, addressed to the Gender Equality Officer, relevant management, and staff.

- **Dissemination among external stakeholders**

It is important to remember the importance of disseminating the Gender Equality Plan also to external stakeholders, such as partner institutions, academic conferences, etc.

To present the dissemination strategy of the Gender Equality Plan it might be useful to use the table reported below, which could be preceded by a brief description of the overall strategy, its goals and its expected impact:

Table X. Gender Equality Plan's dissemination strategy

	Target	Expected impact	Time schedule
Publishing action #1			
Publishing action #2			
Publishing action #3			
Publishing action #4			



4. BEST PRACTICES, TOOLS AND RECOMMENDATIONS FOR GENDER EQUALITY IN AHMSSBL RESEARCH INSTITUTIONS

The following section includes **best practices, tools and recommendations for gender equality in AHMSSBL research institutions**, structured around the three objectives of the European Research Area:

- **Removing barriers to the recruitment, retention and career progression of female researchers.**
- **Addressing gender imbalances in decision-making processes.**
- **Integrating the gender dimension in research and innovation content.**

These best practices, tools and recommendations have been identified during the research carried out in the EQUAL4EUROPE project by the teams in Erasmus University Rotterdam, IEDC Bled and Comenius University of Bratislava, which analyzed the H2020 research projects regarding gender equality in research and academia.

The aim of this section is to provide the most interesting best practices, tools and recommendations for gender equality in AHMSSBL research institutions, to adopt them in the Gender Equality Plan directly or to serve as inspiration for other measures.

4.1. REMOVING BARRIERS TO RECRUITMENT, RETENTION AND CAREER PROGRESSION OF FEMALE RESEARCHERS

The research conducted by the EQUAL4EUROPE team of Erasmus University Rotterdam identified, among H2020 gender equality research projects and local institutional frameworks, the following **best practices, tools and recommendations aimed at removing barriers to the recruitment, retention and career progression of female researchers in AHMSSBL research institutions**.

These tools offer diverse suggestions to contrast mechanisms which create, sustain, and perpetuate gender inequality in higher education institutions. To this aim, most of the instruments emphasize, as a preliminary step, a periodically measurement of gender equality at organizational level. This exercise provides a better overview of the situation, allowing to tackle inequality with the most appropriate measures.

In the field of recruitment, stands out the involvement of the HR advisor and the Gender Equality Officer in the preparation of selections. The recruitment process should, moreover, become standardized, through the implementation of solutions like anonymous selection, structured interviews and scoring systems. Regarding promotions, vertical segregation may be contrasted through mandatory quotas. For instance, introducing quotas for higher academic ranks, which vary according to the rate of women and men occupying the academic rank which comes immediately before (cascade quotas). Experiencing simulations of the promotion process, in addition, increase the confidence of female academics willing to apply for a higher position, and the awareness of risks related to gender bias. Finally, a further positive impact may come from work-life balance measures, like a financial award allowing women to concentrate fully on academic research, upon returning from parental leave.



The diverse measures presented below, which are just a small portion of those contained in the examined tools, confirm that gender equality in recruitment, retention and career progression is a topic to address through a synergic strategy integrating diverse instruments, and operating at different levels of the organization.

Guidelines to set-up a gender inclusive recruitment and selection process

The EQUAL4EUROPE consortium developed a toolkit aimed at providing guidelines and suggestions to set up a gender inclusive recruitment and selection process in higher education institutions. The toolkit, first, examines the three steps of a gender inclusive selection process: (i) How to compose an equitable committee, (ii) Standardization of the different phases of the selection and recruitment process, and (iii) Critical assessment of the process and monitoring of turnover. For each of these three steps, the tool contains useful suggestions and best practices. For instance, involving an HR advisor and the Gender Equality Officer in the preparation of the recruitment and selection process; which tools utilize to write a gender neutral vacancy announcement; and how to critically evaluate a selection process to improve it. The toolkit is completed by "tips and tricks" sections, providing practical indications for a more effective and equal selection process. Finally, as attachments, are made available useful documents for recruiting, like a form to conduct interviews in a transparent and structured way.

Inclusive Recruitment & Selection Toolkit

The EUR Inclusive Recruitment & Selection Toolkit, developed by the Erasmus University of Rotterdam, is aimed at providing guidelines for the implementation of an inclusive recruitment and selection process. It is organized in four steps. The first one concerns the preparation of the recruitment process. The second is about suggestions to strengthen inclusivity of the process, like measures aimed at ensuring diverse talent is reached and triggered to apply for the position, or to set-up transparent and objective processes leading to equal opportunities. The further steps treat, respectively, of indications to standardize the recruitment and selection process, and of final evaluation. Finally, different tips and tricks are offered, per step, to promote inclusive recruitment and selection processes, as well as link to other relevant tools. The most important ones are summarized in the table below.

Tips and tricks to promote inclusive recruitment and selection process.

Steps	Tips and tricks
1. Prepare for the recruitment and selection process	<ul style="list-style-type: none"> ▪ Think about team complementarity ▪ Compose a diverse recruitment and selection committee ▪ Inform yourself about recruitment and selection process and talk about it in the selection committee
2. Inclusive recruitment	<ul style="list-style-type: none"> ▪ Realize an inclusive vacancy text ▪ Spread the vacancy widely among different channels and different groups
3. Standardize the (pre-)selection process	<ul style="list-style-type: none"> ▪ Anonymous selection ▪ Conduct structured interviews ▪ Use scoring when selecting CVs and conducting interviews

**4. Evaluate & Report**

- Evaluate and draw lessons learned for each filled vacancy
- Conduct yearly evaluations

Work-life balance and family friendliness

The toolkit consists of a brief insight on the work-life balance measures adopted by the Erasmus University of Rotterdam, with reference both to pregnancy and childbirth and to care duties and parenthood. With regard to pregnancy and childbirth, for instance, some measures proposed are about supporting women to adapt working and rest hours, to allocate breastfeeding time, to reduce teaching hours, and about work-life coaching. This toolkit works as a point of reference for measures and benchmarks which may be integrated in a Gender Equality Plan.

Measures for individual support of the career progression and different forms of gender quotas

The EQUAL-IST Toolkit was developed by the namesake EU funded project. It is aimed at helping research organizations in setting up actions to improve and achieve gender balance. The toolkit consists of a website providing agile examples of good practices, concrete initiatives, tools and guidelines. Among the fields addressed by best practices there are gender disaggregated data collection, work-life balance, and recruitment and career promotion. In the latter field, the toolkit makes available some examples of measures that could be integrated in a Gender Equality Plan. It includes solutions for individual support of the career progression and female-only tenure track position. A very interesting example, finally, is the one of the cascade-quota, consisting of the introduction of mandatory quota for highest academic rank (Full professor), based on the rate of women and men occupying the academic rank which comes immediately before (for instance, Associate professor).

Measures to remove gender-related barriers to careers through Gender Equality Plans

The toolkit, resulting from the TARGET EU project, consists of a comprehensive instrument about the designing of customized Gender Equality Plans. In the domain of removing gender-related barriers to careers, the toolkit provides a detailed series of measures and examples. As to the creation of a gender-inclusive organizational culture, for instance, the toolkit suggests implicit bias training and the introduction of a fair and transparent workload balance across all areas (teaching, research, administration). In the area of recruiting/promotion/retention, some examples are gender sensitive formulation of advertisements for open positions; policies to increase job security; and balanced women's representation in promotion pools. Finally, about flexibility and work life balance, some of the measure proposed concern telework and the setting-up of career/parent-friendly workplaces.

Open transparent and merit-based recruitment system

This instrument consists of a reflection carried out by the participants to the Gearing Roles EU project on how to update the OTM-R checklist adopted by Euraxess with the aim to foster gender equality in the researchers' recruitment processes. The tool provides a series of suggestions on how to improve the OTM-R checklist as a whole, and some of specific key steps of the recruitment process: advertising and application phase; selection and evaluation phase; and appointment phase. Among these suggestions there are awareness training of recruitment committee members, collecting sex aggregated data during the whole recruitment process, and including intersectionality as a criterion to compose selection committees, besides gender equality.



Organizational change

The FESTA (Female Empowerment in Science and Technology Academia) handbook of organizational change collects the key issues and recommendations that partners in the FP7 project FESTA have worked on. The handbook is divided into three parts, addressing different target groups.

- The first part summarizes experiences and recommendations about organizational change at a fairly general level.
- The second part deals with some particular areas addressed by the FESTA project, like using organizational statistics in raising gender awareness and monitoring progress, the creation of more transparent decision-making processes, and gender neutral appointments and promotions. Some best practices offered in this field deal with the impact of merit-based evaluation criteria on the distribution of grants. They also address the relationship between distribution of grants by gender and the panels' composition, and how to foster efforts to get more of the underrepresented gender to apply for research grants. A useful suggestion, for instance, is creating grant committees that are balanced. Not only in terms of the number of women and men, but also about their seniority. Avoiding, thus, to have committees in which all the men are senior members, and all the women are junior. Regarding the evaluation criteria for grants, particular attention merits assessment of publications through objective criteria. And the weight given to long periods of stay abroad, which are often more difficult for women to attain.
- The third part deals with suggestions and advice for workers committed to gender equality, based on the experiences developed during the project. Suggestions are, for instance, about the need to engage men in the institutional change, and how to do it. Or about the resistance which could raise against gender equality, such as “talk but not act”, or the attempt to make gender equality instances invisible and ignored.

Organizational policies and gender balance strategies for career progression and gender integration in research

The tool was developed by the EU project R&I Peers and is aimed at identifying existing (best) practices related to gender equality in research-related organisations, targeting in particular all stages of the research career, from early ones to the management and decision levels.

The catalogue of practices is organized around 7 main target areas:

- Work-life balance, including a financial award allowing female academics to concentrate fully on their research work upon returning from parental leave, releasing them from teaching and administrative duties.
- Mentoring, including programs based on the practical knowledge of gender issues concerning work-life balance and career progression, and of the way to deal with them.
- Gender dimension in research and curricula, encompassing practices to develop a network of scholars from different fields, in order to promote research and teaching on gender issues.
- Gender equality in decision-making bodies, including measures influencing the electoral process, for instance introducing a gender balance criterion (instead of seniority) in case of drawn between two candidates.



- Gender sensitive language in organisation's documents, concerning strategies involving classic philologists and language specialists to review university communications for their potentially exclusionary or sexist nature.
- Female researchers'/staff (and progression) excellence, encompassing simulations of the promotion process aimed at increasing the confidence of female academics willing to apply for promotion.
- Raising awareness about gender (in)equality issues, including workshops showing how gender bias in the personnel selection process harms the quality of teaching and research, through the participation in a simulated personnel selection procedure as well as in discussions on academic CVs.

4.2. GENDER BALANCE IN DECISION-MAKING BODIES AND PROCESSES

The research conducted by the EQUAL4EUROPE team of IEDC Bled identified, among H2020 gender equality research projects and internal frameworks of other European higher education institutions, the following **best practices, tools and recommendations aimed at addressing gender imbalances in decision-making bodies and processes in AHMSSBL research institutions.**

The analysis conducted in this section emphasizes that an impulse to gender equality in decision-making bodies may result from direct measures and from strategies aimed to change the culture, perceptions and behavior in academic organizations, promoting women's leadership.

Direct measures are those expressly aimed at balance women's and men's representation in decision-making bodies, for instance through gender quotas. An alternative may consist of adopting a "gendered" electoral process. A good example is the solution implemented by Ghent University: an electoral system favoring candidates of the underrepresented sex, when the elections have a gender outcome not respecting a minimum balance.

Tools and good practices to promote and support women's leadership mainly consist of training and development programs. They usually address the challenges of leadership and of strategic management in an academic context, fostering the development of the consequential specific skills. Nonetheless, this domain also embraces initiatives to overcome unconscious bias related to gender, and programs enhancing engagement and awareness of management about gender equality issues. As well more specific measures, like those providing women with assistance in designing their campaign for the elections of decision-making bodies, might finally be helpful.

A strategy to foster gender equality in decision-making bodies, thus, should address both sides of the issue, conjugating direct measures like gender quotas and more far-reaching initiatives like those focusing on women leadership, on the basis of the concrete needs detected in each institution through a preliminary analysis of gender equality.

Actively supporting women in elections for decision-making bodies

The EIGE's Gender Mainstreaming website reports some best practices and successful stories about integration of gender equality in research. Among them, there is the implementation of the EU funded INTEGER project in enhancing gender equality in decision-making bodies at Siauliai University (LT). This is a particularly interesting



example, dealing with a context where there is no legal ground for the introduction of gender quota. It consists of a composed strategy, including raising awareness, legal advice and scouting for candidates. The activities implemented embraced (i) a series of formal meetings to raise awareness of the highest management of the Siauliai University about gender issues; (ii) the involvement of the legal advisor of the university to explore the ways to foster women's representation in the elections for the university Council; (iii) a successful campaign to change the eligibility criteria for the Council, removing those penalising women, like the requirement to have 10 years of experience in management and supervision, then reduced to five years; iv) a search for women available to run for a seat in the Council, and responding to criteria like commitment to further implement gender equality at the university. The outcomes of the INTEGER project were significantly positive, allowing the rate of women in the university Council reach 36.3% in 2014, while in 2011 no women were present. In this view, the EIGE report carries out an in-depth analysis of the actions adopted at Siauliai University to reach this goal. Finally, the effort to reinforce gender equality in decision-making bodies is described also through a [YouTube video](#), which is not only inspiring, but also emphasizes the effectiveness of such a tool in spreading information about gender-related best practices in this or other relevant domains.

Benchmarks on promoting leadership and fostering female leadership in higher education institutions

The EU funded Gearing Roles project developed a Best Practices Report, identifying a number of inspiring practices addressing the promotion of leadership in higher education institutions, as well as initiatives and programs to foster female leadership. Some of the practices presented in the tool include leadership development programs -which provide leaders/potential leaders with the possibility to participate in seminars and develop skills such as identifying particular characteristics and challenges of leadership and strategic management in an academic context-, different forms of leadership training projects and examples of networks aimed at building bridges among universities to implement capacity building.

Fostering gender equality in decision-making bodies through international exchanges and organizational training

This Impact story is a small report resulting of the EFFORTI project. This EU funded project aimed at improving gender equality initiatives and at increasing their efficacy, as a way to progress towards the achievement of the European Research Area. The Impact story deals with obtaining gender balance in decision-making positions, through increased academic and leadership qualifications from international research mobility and leadership training. Two interventions are presented. One is the mobility support for female researchers to stay at other private or public sector research environments, such as move abroad for a period or invite female researchers from foreign universities or research organizations. The other, leadership training on organizational and hidden structural gender barriers to increase awareness and knowledge about organizational barriers to achieve gender equality in Research, Technological Development and Innovation (RTDI). The report includes, besides the description of these interventions, an evaluation of their objectives and the outcomes related to these measures.

Gender balance in the election procedure

The new election procedure for the Board of Ghent University (Belgium) requires faculties to have at least one female and one male candidate for the elections. If the elections have an unbalanced gender outcome (not



respecting the minimum 40/60 balance) the candidate with the least votes from the overrepresented sex (compared to other faculties) has to give way to the faculty's candidate of the other sex with the highest number of votes. Although it triggered some resistances, the new procedures paved the way for substantial changes: as a result of the 2014 election, the Board has now a 50/50 composition. There was no further need to implement positive measures to elect a female representative and the reformed election attracted the most voters ever in the history of the University.

Gendering decision-making and communications processes

This report realized by the EU funded FESTA project sets out the structure of positional power and the arenas of decision-making in the organizations. Drawing on documentary evidence and interviews with decision makers and committee members in these institutions, it reveals how organizational practices in relation to decision-making and communications conceal the operation of power and contribute to gender inequality. Recommendations are made which address structural and cultural issues, to facilitate more transparency and accountability in decision-making and communications processes and to advance gender equality. These recommendations are about creating structural change, like establishing an independent equality committee with top level support; about cultural change, such as implementing regular meetings between management and staff for information exchange. Or about supporting women to participate fully in the decision-making process, like introducing/enhancing training for women in leadership and decision-making.

Improving the meeting culture

From 2014, Uppsala University developed a methodology for addressing bias affecting the conduction and dynamics of meetings in decision-making bodies. The starting assumption is that gender equality in decision-making bodies is more than gender representation. It is also about interaction, reducing gender bias in meeting preparations and adjusting meeting behaviours. This may be, hence, another way to foster gender equality. In this context, a [specific toolkit](#) was developed in the framework of the FESTA project. It basically consists of training for senior staff responsible for meetings, to sensitize them about facilitating constructive practices internal to decision-making bodies. The toolkit, thus, provides instructions and materials to implement: (i) meeting facilitation training courses for meeting leaders; (ii) as a follow-up, surveys to monitor the status and possible development of the meeting cultures based on the training activity already carried out. The final goal is neutralizing gender-based discriminatory dynamics promoting cooperative, inclusive interactions in decision-making bodies, based on dialogue and openness.

Increasing transparency and inclusivity in the informal decision-making and communication processes

The EU funded FESTA project conducted a comprehensive analysis of measures to increase transparency and inclusivity in the informal decision-making and communication processes in research units. The identified solutions should encourage a more active participation of women in all the decision-making and communication processes.

A [first toolkit](#) is focused on operational methodology for analyzing the impact of informal communication and decision-making processes on target institutions. It formulates policy amendments aimed at changing the status quo in situations where participation and transparency are lacking. Some of these policies are: sharing information



about structural changes of units/departments in a pre-arranged way (for instance, mailing lists, newsletters); developing informal strategies and open campaigns to promote the appointment of women in committees and boards; transforming some currently opaque decision-making processes into more transparent ones (such as, establishing clear, ex-ante criteria in fund allocation, or detailing the required activities of PhD students).

A [second toolkit](#) deals with operational guidelines to implement increased transparency in decision-making. From this point of view, it provides a set of lessons learnt and a set of recommendations to follow when a similar process is going to be undertaken in other contexts. They include technical indications, like utilizing Descriptive metrics helping to measure the implementation process effectiveness. And counter-intuitive hints, such as concentrating on the informal aspects of decision-making and communication processes and leaving gender issues in the background as a helpful strategy to better identify key issues in the relationship between gender and informality.

Inspiring stories on gender equality in power and decision-making

This publication is a collection of articles written by members of EIGE's Journalist Thematic Network (JTN). It contains real stories on the topic of gender equality in power and decision-making in the EU Member States. These stories address different themes, not necessarily linked with the academic sector, such as: occupying a leading position with young children; the peculiar discriminatory dynamics affecting specific sectors and jobs; or the conditions of gender (in)equality in decision-making bodies in specific countries.

Leadership engagement on gender equality

The HeForShe project developed a toolbox about organizing a session to explore how leadership can support women to advance in the workplace and how to set an example so that both female and male employees are equally valued. The aim of the session is enhancing an understanding of the benefits of gender equality among the leaders and help leaders to understand what they can do in their own position to influence change. The toolbox offers, first, guidelines for the organizers, for instance establishing that any information disclosed during the session can be reported by those present but the source of that information may not be explicitly or implicitly identified. Furthermore, it provides guidelines for the facilitators of the session, some examples of questions to kick-off and carry out the discussion -such as "What can you, as a leader, do tomorrow to begin to rectify gender inequality?"-, some concluding remarks and a template to prepare pre-questionnaire for participants.

Policy analysis of strategies for gender equality in decision-making bodies

The EU funded GEECCO project conducted a detailed analysis of decision-making in each of its partner institutions, focusing on differences and similarities in gender (in)equality. For every participating institution, this tool offers a brief description of the school, with detailed explanations of the organization and composition (by sex) of the decision-making bodies and structures. On this basis, it identifies gender-related positive and negative issues for every decision-making body, with included gender-related policies already existent at the school. The tool provides descriptions of these policies, which include Career Advancement Plans and Gender Equality Plans.



Statistical data to assess the current state of play of gender equality in decision-making bodies in the EU

Among the tools made available by EIGE, there is the Gender Statistics Database, subcategory “Women and Men in D-M”. It serves as a data reference point to assess the current state of play in EU countries, regarding gender of members in National academies of science and in Research Funding Organizations.

4.3. INTEGRATING THE GENDER DIMENSION IN RESEARCH AND INNOVATION CONTENT

The research conducted by the EQUAL4EUROPE team of Comenius University of Bratislava identified, among H2020 gender equality research projects, the following **best practices, tools and recommendations aimed at integrating the gender dimension in research and innovation content**.

The best practices, tools and recommendations analyzed in this paragraph -normally conceived for STEM institutions but easily replicable in AHMSSBL ones- emphasize the multi-level and transversal nature of integrating gender dimensions in research and innovation content.

This effort involves, first, teaching and research in a narrow sense. The available solutions for teaching go from paying attention to gender-issues when preparing students’ curricula to more practical indications. These include interpreting and discussing data, stimulating critical thinking and breaking gender patterns through specific examples. An effective integration of gender dimension in teaching should also have a wide scope, addressing pre-academic and academic students, PhD students and young researchers without previous knowledge of the topic.

As to research, the integration of gender dimension encompasses organizational and methodological recommendations. Among the first one, there is the structuring of gender balanced research teams. On the methodological side, eliminating gender bias and adopting investigation approaches focusing on gender implications. In this sense, interesting examples emerged about topics like health research, engineering, new technologies and environmental issues.

Furthermore, gender dimension is relevant for research funding. In this context, guidelines about gender sensitive preliminary literature review or structure of research questions, and about fixing biased approaches helps to develop competitive proposals. In addition, the implementation of a gender sensitive approach among funding organizations may foster the financing of research projects with gender implications. And a similar process involving peer reviewers can enhance the scientific impact of gender-oriented publications, making them more relevant also for grants assignments.

Correctly identifying the term ‘gender dimension’

The Lexicon developed by the EQUAL4EUROPE consortium provides information to correctly identify what is “gender dimension” in research. This term was developed within the European Commission and means integrating sex and/or gender variables and analysis into research. According to [EU Commission’s Gendered Innovations report](#), “sex” refers to the basic biological characteristics of females and males, and “gender” refers to cultural attitudes that shape “feminine” and “masculine” behaviors, products, technologies, environments, and knowledge.



Assessing research merits without gender biases

The toolkit was developed by the GENOVATE EU funded project, and seeks to provide higher education institutions, research bodies and funding institutions with guiding principles on gender equality and diversity competent research excellence standards. Among the addressed areas, there is ensuring that the achievements of women and men researchers are assessed on the same basis, providing detailed operational guidelines for that. These guidelines encompass the adoption of evaluation criteria operating on short time-periods, or on pro-rata basis, to facilitate more equal comparisons and prevent women to be disadvantaged if their research track record was temporarily interrupted (for instance in case of maternity leave). Other important guidelines are about the individual circumstances to consider in evaluating researchers' profiles (such as periods of leave and workloads), and about implementing a continuous monitoring of gender ratio among applicants and successfully candidates, publishing the periodical results.

The final section of the toolkit is dedicated to integrating gender perspectives in knowledge production. Its main goals are ensuring that researchers consider gender dimensions in research design, methods, and dissemination; and supporting specific research on gender and diversity to feed into all disciplines and research subjects.

Criteria for gender-inclusive activity in pre-academic education

The toolkit developed by the HYPATIA consortium investigates how to create STEM education activities that are gender-inclusive, addressing girls and boys in pre-academic age. The analysis conducted in the toolkit embraces a number of levels (individual, interactional, institutional, and societal/cultural) and examines how conditions and constraints at these levels shape STEM activities leading to inclusion (or exclusion) of various types of learners. The information provided by the toolkit may be useful to address gender inclusiveness in other existing STEM education activities, or to design new gender-inclusive activities. Examples of the solutions offered concern the implementation of inclusive ways of engaging, for instance avoiding competitive ones and favouring, instead, solutions based on arguing one's perspective, and/or on reaching agreement (or not) on a specific topic. Other proposed measures are about ensuring that the diversity of science is represented to the largest extent possible-exploring the different sequences and trajectories of inquiry embraced by the scientific method- and about different learning activities. These learning activities also include interpreting and discussing data, and understanding wider implications.

Design a gender specific course

The Embedding Gender Knowledge document, developed by the EU project SAGE, deals with the problematics of integrating gender dimension into research content and curriculum. It contains guidelines for integrating sex and gender into scientific research. As an example, the toolkit indicates how to write a gender-sensitive call for articles, which should include a request to authors (i) to clarify when only one gender/sex is included in the study; (ii) to state if a gender/sex perspective intervened in the literature review; (iii) to adequately explain if gender/sex is integrated into the research design, study process and in presenting and discussing the effects and results of the study. As well, the toolkit contains a checklist about gender-sensitive actions for research proposals/articles, addressing areas like structuring a team, design a proposal and present the scientific outcomes. Further recommendations are about designing gender specific courses in topics like Gender and Law, Women and gender



studies, Gender and media and Gender and politics. The material provided by the toolkit contains detailed descriptions of the courses, including course objectives, overview of lectures and recommended readings.

Gender case studies

This toolkit developed by the EU project PLOTINA includes a large list of case studies concerning the integration of sex and gender dimensions in research. It is aimed to emphasize the variety of areas and topics that might be relevant for a gender-based research. Among the covered disciplinary fields there are:

- Psychology, for instance through the case study "[Dyadic adjustment of newlyweds over time](#)", where a gender-based approach was adopted to study the differences in emotion regulation, stress management and conflict resolution of women and men after marriage.
- Health research, including among the case studies also "[Choice and linking the fat-rich foods: are there gender-related differences?](#)", investigating different attitudes, between females and males towards fat-rich products.
- Gender studies, with a case study about "[Measuring gender inequality at university using an Index. The case of the University Bologna](#)", consisting of a practical application of the University Gender Inequality Index, developed by the University of Bologna and measuring the distance between the situation of gender inequality performed by each university and the maximum level of inequality that can be recorded concerning each domain. And another case about "[Developing a postgraduate level online module on gender and research](#)", regarding developing materials to train scientists to consider gender aspects in their research and obtain ethical approbation for their studies.
- Environmental studies/climate change research, for instance through the case study "[Climate change mitigation: gender aspects](#)", verifying the validity of the assumption that climate change affects women and men differently.
- Engineering/technology, for instance through the case study "[The influence of gender on the design of drills and the influence of their design and communication to the construction of gender roles](#)", addressing the impact of gender in the design of manual tools.

Gender in research and competitive EU research projects

The toolkit "Gender in EU funded research" was developed in 2011 by the European Commission. It provides practical guidance on how to integrate gender into research and helps researchers to understand the "gender and science" issue and to become more sensitive towards the gender dimension of/in science. Furthermore, it contains instructions about including the gender dimension throughout a research project, eliminating gender bias. Other insights enabling to write a more competitive proposal are about the creation of a gender-balanced research team and on making research results more relevant for the society. Regarding the removal of gender bias in research implementation, some of the most relevant recommendations are about making data collection tools (such as questionnaires and interviews) gender-sensitive, and about taking sex as a central variable, analyzing other variables with respect to it (for example, sex and age, sex and income, sex and mobility, sex and labour).



Gender sensitive teaching

The toolbox was developed in the framework of the Baltic Gender EU funded project. It deals with gender-sensitive teaching, focusing on STEM subjects and examples from Marine Sciences or related disciplines. It concentrates on two facets of gender-sensitive teaching: “Gender in curricula” and “Gender-sensitive teaching setups”. Furthermore, it aims to sensitize teaching staff in STEM to firstly pay attention to gender differences in the classroom and second, to give a number of practical ideas to break gender patterns in their direct educational environment.

Some concrete examples from teaching practice are embedded in the toolbox. Among them:

- The utilization of practical cases inspired by real situations to challenge gender stereotypes in academic teaching, for instance showing that the leading role in a group is not always played by men.
- Emphasizing that women can be the main character of a typical men-based example and vice-versa, such as realizing examples presenting a man doing ice skating, when these typical examples involve women.
- Adjusting experiments generally requiring the participation of men, for instance, because they require to lift heavy weights, demonstrating that they can work also with women, simply reducing the weights.

Guidelines about integrating gender in research for research funding organizations, researchers and evaluators

The aim of this tool, realized by the EU funded project GENDER-NET, is to assist three target groups (research funding and performing organizations, researchers, and peer reviewers or evaluators) with the know-how to integrate sex and gender considerations into policies, programs, and projects, raising awareness about the importance of sex and gender in research and innovation.

The toolkit provides specific guidelines and checklists about integration of gender in research for each of the three target groups.

With reference to researchers applying for a grant, for instance, the guidelines contain suggestions about gender integration in key-fields like preliminary literature review, the structure of research questions, research and dissemination techniques. The checklist provides a series of specific questions linked to the same topics treated by the guidelines. The researcher is encouraged, for instance, to consider if she/he has appropriately applied to the proposal design the insights from the literature review on similarities and differences between men and women; to include, if appropriate, a mechanism to disaggregate data by sex and other gender-related variables in the collection and in the analysis stages of the proposal; and/or to draft a dissemination plan facilitating the effective use of the sex and/or gender outcomes of the research.

The toolkit is concluded by concrete examples of integration of gender in research, concerning, among others, topics like “Health, demographic change and wellbeing”, European “Inclusive, innovative and reflective societies”, and “Protecting freedom and security of Europe and its citizens”.



Integrate a gender-sensitive approach into research and teaching

The aim of the toolkit elaborated by GARCIA project is to help researchers integrating the gender dimension in their ongoing research and teaching (of undergraduate, graduate and doctoral courses), and to consider it while preparing new projects and students' curricula.

Research is considered gender-sensitive when it takes into account the differences between men and women in all aspects of the research (from formulating research questions to the outcomes and presentation of results) and when provides equal participation of both women and men in scientific work. Tailored recommendations and practical examples guide the user into integration of gender in research, with specific reference to research design, methodological structure and outcomes.

Gender-sensitive teaching pays attention to gender differences both in creating a syllabus and in class conduct. Specific recommendations are introducing users to gender dimension of the presented contents, including publications that take gender-sensitive approach into the course readings and giving homework assignments that demand from students to think about gender dimension of the subject.

The toolkit is completed by checklists concerning gendered research and teaching, summarizing the mains contents of the toolkit in the form of questions.

Research methods and practical indications to integrate gender in research

Gendered Innovations is a project promoted by the European Commission and by the Stanford University, mainly aimed at incorporating gender in research about Science, Health and Medicine, Engineering and Environment. In this context, the website of the project hosts a section about Methods of Sex, Gender, and Intersectional Analysis, providing detailed explanations about methods helping to integrate sex, gender and intersectional analysis into research from the start. This section includes general methods, about [Rethinking Research Priorities and Outcomes](#), [Formulating Research Questions](#) and [Intersectional Approaches](#). More specific methods are available for topics like Health & Biomedicine, Artificial Intelligence, Urban planning/Transportation and Innovation. Furthermore, tailored checklists help the users to integrate gender in research in these specific fields. The checklist about [Health and Medicine](#), for instance, includes indications about adjusting gender dimensions for the proposed research, suggesting to choose a reduced number of gender identities (such as man, woman, non-binary or gender diverse), to pay attention to gender norms and behaviors and to their evolution in the time.



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