



# Triggering Institutional Change towards Gender Equality in Science

Final **Guidelines**  
of the TRIGGER Project

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with TRIGGER partners



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# Executive summary

Gender inequality in European science is an enduring problem, despite almost twenty years of EC policies.

While being directly involved in actions geared at promoting gender equality in its structure and programmes, the European Commission has been also stimulating the governments of the EC member states, as well as individual scientific institutions, scientific societies and networks, and private organizations to adopt analogous measures at their level.

Starting from 2010, the EC launched a new strategy, further developed in the following years throughout the 7<sup>th</sup> Framework Programme (2007-2013), to support the practical implementation of structural change initiatives in European research organisations. This strategy entailed the support to the adoption of tailored **gender action plans** in the research institutions, which continued in the Horizon 2020 programme (2014-2020).

## The structural change strategy in practice

The emphasis given in the EC strategy to capitalising and learning from each other favoured the accumulation of plenty of documents concerning how to devise a gender action plan and how to design individual initiatives (e.g., mentoring programmes, trainings for leaders and committee members, teaching courses, communication campaigns), plus guidelines on several issues relevant to gender equality in science (e.g., gender aware communication, sexual harassment, hiring and selection of human resources).

Thus, while there is a wide availability of information about how to design and implement systemic actions and individual initiatives, what is less developed is a **common frame to interpret what actually happens** when a gender action plan is put into practice and why action plans often don't activate all the expected changes, even though other unexpected changes occur.

## Gender action plans and social change: focusing on the process

Institutional change towards gender equality is not a small feat. Changing gender relationship in an organisation requires a deep transformation of organisational practice and culture. What is at stake is thus not only how to design and implement a set of actions, even complex and innovative, but understanding how a process of change can be triggered and fostered through an action plan, thus managing the unplanned and the unexpected and pursuing institutional change, when necessary, even by going beyond, modifying and/or abandoning some of the planned actions. In fact, there is always a **gap** (even small) **between the plan** as it is conceived and implemented, on one hand, and **the social process of change** which is actually activated on the other; and the success of an action plan depends largely upon how this gap is managed in practice. These guidelines, addressed to whom is interested in launching enduring gender equality initiatives in a scientific institution, are meant to provide orientations and analyses to manage what may actually happen when, in a given research organisation, a gender action plan is launched (be it promoted



by a specific project team, the HR Department, the Rector, the Head of a department or other internal stakeholders).

## **The TRIGGER project and its final guidelines**

Being funded by the EC in the fourth wave of structural change projects, besides implementing five gender action plans in as many European universities, and promoting mutual learning initiatives inside and outside the project consortium, the TRIGGER project devoted a particular attention to the wider debate about how institutional change towards gender equality can actually happen. The reflection has also involved representatives of another eight EC-funded structural change "sister" projects (EGERA, FESTA, GARCIA, GenderTime, GenisLab, GENOVATE, INTEGER and STAGES, financed in the same time span of four years and implemented between 2011 and 2017), who accepted to share their experience in three workshops, to be interviewed and to provide further documents to illustrate their cases.

Leveraging upon the outputs of the mutual learning and on the same theoretical set-up of TRIGGER, an **integrated elementary model of the process of change** has been developed including the four main components listed below. These components have been conventionally identified and operationally distinguished, being aware of the fact that in reality often they tend to overlap.

- **Transformational agent** is the component of the process in which a group of people (a team) progressively becomes a transformational agent within its organisation, being gradually more and more able to manage the complexity inherent in institutional change.
- **Activation and mobilisation** affects the ways through which a gender action plan succeeds in mobilising and involving other actors and individuals, achieving the consent, energy and support necessary to trigger a process of change.
- **Making an impact** refers to the capacity of a gender action plan to actually alter existing institutional arrangements, activating a process of change, which strongly depends on factors and risks needing a constant observation.
- **Sustainability** affects the ability of an action plan to activate mechanisms allowing it to keep generating impacts after completion, not only formally securing organisational change, but also introducing social levers of change ensuring a constant improvement of gender equality in the long run.

For each component a set of strands of action have been singled out, illustrated through concrete cases drawn from the experience of TRIGGER partners and "sister projects" in order to provide information on different aspects of the process of change, such as recurrent patterns, drivers, barriers and implications, and to give, if not recommendations for action, useful orientations and guidance for interpreting the processes going, their risks and potentials.

## Components of the process

### *Transformational agent*

To make a team become a transformational agent is a demanding process. The risk is establishing a team which lacks, due to internal or external factors, the competences, sources, support, and internal authoritativeness to trigger institutional change.

The guidelines identify four strands of this process that should be properly managed by the teams engaged with the implementation of a gender action plan.

1. **Accessing expertise.** To avoid the risk of impossibility to design and manage the action plan, promoting the access of the teams to the needed expertise is a main aspect. Diversify expertise is necessary to cope with complexity. Mixing scientific and managerial expertise turned out to be an asset, even if requiring a continuous team building work.
2. **Reputation building.** Increasing the reputation and visibility of the teams is necessary to overcome the hindrances deriving from the low status that is a frequent characteristic of the teams implementing action plans. Team members, often young people and/or temporary employees, can be not recognised as authoritative, competent and capable enough to attract and activate other people. In a scientific environment, having senior researchers involved is a key priority.
3. **Organisational embedment.** To avoid isolation and invisibility for the team and its actions, promote networking to really embed the team in the organisation at various levels and involving different stakeholders. Ownership of gender equality is to be gradually extended, gaining visibility and becoming part of the organisation's ordinary life, being considered one aspect of the mandate of its leaders and officers.
4. **Securing staff and resources.** To prevent the risk of discontinuity of the gender equality plan, to promote the stable access of the team members to working conditions and resources adequate to their task is a real necessity. Gender equality action should be based on the work of people, be they academic or managers, with diversified skills whose economic costs is recognized and adequately remunerated.

As for the transformational agent, besides describing the strands of the process, some key issues related to this component are also reported in the guidelines, namely: taking the complexity of the action plan seriously, widening the space for gender equality issues, avoiding a misleading view of volunteering and promoting the sense of ownership of the action plan.

### *Activation and mobilisation*

When change is expected to influence practically all the aspects and levels of a given organisation, as it is the case of gender equality, the question of why and how to activate institutional stakeholders and employees becomes crucial. What is at stake is preventing the risk for the action plan to remain invisible or too marginal to induce actual changes in the institution.

Six strands of the process, through which a gender action plan becomes a tool for mobilising and coordinating actors and individuals, have been singled out in the guidelines.

5. **Scientific recognition.** Promoting the scientific recognition of the team and the action plan is a way to counter the idea that gender inequality is not scientifically proved, or that tools to ascertain inequalities are not methodologically correct. This is possible by generating data and information which are able to show how gender inequality is a scientifically grounded fact, to be addressed through a methodologically sound action plan. Due to the features of this working environment, for the action plan in a scientific organisation to succeed in activating participatory processes, it is necessary to exhibit the accuracy, scientific validity and reliability of its interpretation of gender inequality.
6. **Political backing.** The fragility, instability and precariousness of the support offered by top leaders and managers, sometimes implying serious consequences for action plans, may occur for several reasons and is to be addressed with different strategies. Among those, a personal involvement of the leaders as testimonials for gender equality in public occasions turned out to be a good way to avoid a discontinuity in political backing.
7. **Engagement space creation.** To avoid the risk of people's and stakeholders' withdrawal from commitment over time, engagement spaces are to be created, allowing to turn passion, interest and willingness to participate into actual participation. Engagement spaces are to be intended both in physical and social terms. In some cases, they may become autonomous structures (networks, associations, research groups, virtual platforms, etc.) able to keep on developing after the end of the funded period.
8. **Mobilisation of pro-women actors.** Not to waste a wealth of opportunities for gender equality commitment, groups and structures already concerned with gender are to be involved. Pro-gender national and international networks, as well as internal pre-existing active players, are resources to be activated, even if this may imply an additional effort, as an investment to reinforce the team's action and to gain internal acknowledgement for gender equality.
9. **Active involvement of men.** Gaining the active involvement of men is essential to debunk the belief that gender equality is only a women's affair. Keeping men aside turns out dangerous for gender equality plans, due to different reasons (from hostile men's reactions and diffidence of women towards women-only initiatives to marginality of gender in the policy agenda of the institution).
10. **Implementation backing.** To prevent that decisions on gender equality are only formally made, it is to consider that any strategy and policy of the organisation pass through middle managers and senior researchers. Capturing their interest and motivations and getting their active support is therefore an unavoidable step for the action plan to permeate and be active in all sectors of the organisation.

Some key issues pertaining to this component are discussed in the guidelines, including: attending to the interpretive and symbolic aspects of the action plan; promoting targeted mobilisation strategies; finding external support to increase internal visibility and authoritativeness; creating autonomous mobilisation agents; balancing the fragility of voluntary engagement through appropriate measures (such as developing step-by-step mobilisation approaches).

## ***Making an impact***

The capacity of a gender action plan to actually alter existing institutional arrangements, activating a process of change, is not to be taken for granted. Implementation and "impact-making" are not to be confused. Implementing actions, although essential, does not necessarily lead to modifying existing institutional arrangements, making them more gender-sensitive and less male-dominated. The risk for the plan is a sort of irrelevance and waste of resources.

A plenty of factors can come into play, affecting the actual possibility for an action to produce impacts. Some of them have been analysed through the experiences of the TRIGGER partners and those of the other sister projects.

Six strands of the process of impact making have been analysed. Some emerging indications are summarised here below.

11. **Self-reflexive processes.** In the gender equality teams and their institutions, anticipating the consequences of one owns' actions through self-reflexive procedures and attitudes is a way to avoid, as much as possible, negative unintended effects. Embedding mechanisms of this kind in research organisations is likely to increase the impact of action plans and even to trigger long-term processes of change. Self-evaluation is to be considered as part of the process of change.
12. **Gender-sensitive communication.** Gender sensitive communication is to be adopted to avoid that gender bias in communication may reproduce inequality patterns which the action plans to dismantle. Changing the way people communicate in the working environment is difficult and long, but modifying language, contents, style and symbols used in administrative documents and institutional communication may have multiplying effects throughout the organisation and greatly support the action plan in its implementation and impacts.
13. **Gender-sensitive education.** Fostering a gender sensitive education and training is a way to change scientific culture in the medium-long term. Gender is often considered something irrelevant or even a foreign body in research organisations, mainly in hard sciences. Hence the need for the action plans to demonstrate how educating students and young researchers on these issues is relevant for them, the organisation and scientific research at the same time.
14. **Action plan tailoring process.** Not to lose relevance and the interest of stakeholders, the plan is to be adapted to circumstances and emerging needs of the organisation through participatory processes. Impacts also arose from changing strategy (e.g., alliances, type of activities, style adopted) during operation. Flexibility and open-mindedness are to be always adopted. Based on a constant monitoring of reality, changes are to be introduced whenever needed.
15. **Policy integration.** To overcome the frequent consideration of the action plan as a stand-alone policy or a special programme, bound to finish with the external funding, synergies with existing relevant policies of the organisation are needed. The plan will be as much impactful as much it will liaise with internal reforms, institutional strategies and/or local applications of national laws, becoming triggering devices able to activate broader change mechanisms in the organisation.

16. **External backing.** Assure an external backing from such players as scientific partner organisations and networks, national or local authorities and other relevant stakeholders, as a way to reinforce the impact of the gender equality action on the organisation and to prevent the risks connected with isolation, such as backlashes and irrelevance.

The key issues emerging from the analysis of the process of impact making are as follows: careful handling the concept of impact, adopting an open-minded and flexible approach, understanding negotiations as the main tool for making an impact, leveraging whenever possible on existing tools, policies and opportunities and keeping a realistic view of impacts.

### ***Sustainability***

Generally speaking, sustainability refers to the capacity of a project to ensure that its outcomes continue after the end of the external funding. As for gender equality plans, it practically means that the changes introduced in the organisation should be, if not permanent, at least sustainable in the long run, not disappearing with the end of the action plan or because of a simple leadership turnover. Following the approach of the guidelines, sustainability could be described as an output of a process which develops all through the action plan and can be driven (at least partially) by the team.

Five strands of the sustainability process are analysed in the guidelines, each related to the inclusion of gender in some key organisational processes.

17. **Inclusion of gender in monitoring systems.** To prevent the risk for an organisation to deny, overlook or practically neglect gender inequality, gender is to be part of the monitoring systems such as databases on employees and students, observatories on human resources, budgeting system. Various techniques and tools are available and have been successfully experimented.
18. **Inclusion of gender in scientific excellence.** Gender aspects are to be taken into account in scientific excellence, intended both as a symbolic aspect and as a general ordering principle of the institutional action, so as to dismantle its supposed neutrality. The biased vision of science underlying the most part of approaches to scientific excellence strongly affects women's careers, research contents and methods, peer-review evaluation processes, access to research funds, scientific recognition and awards.
19. **Inclusion of gender in service provisions.** Gender considerations are to be carefully taken into account in designing and planning services to people studying and working in science and academia, e.g., against sexual harassment, to support researchers' work-life balance and careers, to commercialise research's product, in order to avoid reproducing inequalities through services, which do not take into account women's experiences and needs.
20. **Inclusion of gender in organisation's standards.** To actually embed equality in the research institutions' life and not to remain marginal with respect to its dynamics, gender is to be included in organisation's standards such as management of human resources or support to early career researchers.

21. **Inclusion of gender in an organisation's structure and mission.** To prevent the risk that gender inequality is only formally addressed in a given institution, gender should be inserted in its structure and mission, being visible in the organisation chart, in the statutes and other relevant documents, and in its strategic planning.

As for sustainability, the emerging key issues refer to sharing the concern about sustainability as widely as possible, planning sustainability at the beginning of the action plan, combining sustainability and quality assessment of the action plans, tailoring the sustainability approach to the different actions, assuring a future responsible entity for the action plan.

In the next two pages a scheme summarising the contents of the guidelines.

<b>AREA 1 – Transformational agent</b>	
<b>1. Accessing expertise</b> <i>Knowledge and skills to manage gender dynamics</i>	<b>2. Reputation building</b> <i>Visibility and legitimacy of the teams</i>
Gender Experts, Scientists and Administrative Officers	
Planning the Involvement of Experts From the Beginning	Focusing on Young People
Fine-Tuning the Agendas	Struggling for Visibility in a Complex Environment
Adapting to the Rhythms of the Organisation	
<b>3. Organisational embedment -</b> <i>Internal networks in charge of gender equality actions</i>	<b>4. Securing staff and resources -</b> <i>Stable staff and resources for gender equality actions</i>
	Stable Gender Officers
Promoting Synergies among Networks	Successful Co-Financing Strategies
The Pros and Cons of Institutional Networks	Ensuring a Full-Time Coordinator
<b>AREA 2 – Activation and mobilisation</b>	
<b>5. Scientific recognition</b> <i>Scientific methodologies to increase awareness and ownership</i>	<b>6. Political backing</b> <i>Leaders as testimonials for gender equality</i>
Participatory Gender Audit	International Campaign "He for She"
Testing New Methods	When Formal Support is not Enough
Going in Depth into Inequality Mechanisms	Developing Complex Strategies for Leaders' Involvement
The Path towards Transparency about Gender Issues	Connecting Leadership Involvement and Public Accountability
<b>7. Creating space for engagement</b> <i>New groups and institutions for new challenges</i>	<b>8. Pro-women actors' mobilisation</b> <i>Involving groups and structures already concerned with gender</i>
An Internal Committee to Take Action	National and International Network of Women in Science and University
Multidisciplinary Teams on Gendered Research in STEMs	An Institutional Network on Equality in Science
Participatory Groups at Faculty Level	Visibility and Cooperation Through National Networks
A Team for Promoting Gender in the Research Contents	
<b>9. Men's active involvement</b> <i>Bringing men into the core of institutional change</i>	<b>10. Implementation backing</b> <i>Support from middle managers and senior researchers</i>
Men Testimonials and Gender Equality Experts	
An Involvement of Men Planned from the Beginning	Stereotypes and Scepticism in Supporting Women's Careers
Welcoming Men's Critical Positions	Factors Hindering the Involvement of Senior Researchers
Excluding a Male-Dominated Culture Rather Than Excluding Men	Participatory Techniques to Involve Managers and Research Leaders
<b>AREA 3 – Impact-making</b>	
<b>11. Self-reflexivity process</b> <i>Reflexive praxes in the teams and in the management of research institution</i>	<b>12. Gender-sensitive communication</b> <i>The relevance of language for administrative leaders and staff</i>
Evaluation as Guided Self-Reflection	Fighting Sexism in Institutional Communication
Qualitative Indicators for Measuring Gender Equality	Training the Administrative Staff to Use a Gender-Sensitive Language
Techniques for Detecting Gender Stereotypes	Resistances to a Gender-Neutral Communication
Assessing the Impact of Wrong Policies	A Conference to Raise the Awareness on a Gender-Biased Language

<b>13. Gender-sensitive education and training</b> <i>Dealing with gender in starting scientific education and career</i>	<b>14. Action plan tailoring process</b> <i>Tailored design and participatory planning</i>
A Contest for Students on Sex and Gender Aspects of Chemical Research	Women Researchers Plan Training Initiatives
The Difficulties to Attract PhD Students	A Consultation for Identifying Women's Career Needs
A Course for Students Facing Scepticism and Opposition from Administrative Staff	Rethinking Work-Life Balance Measures Based on Research Results
Handling Busy Agendas for Creating Space for Gender-Sensitive Training	A Workshop for Involving the Target Group
<b>15. Policy integration</b> <i>Support to and coordination with the institutional strategies on gender</i>	<b>16. External backing</b> <i>Networks and alliances with external actors</i>
Supporting International Events on Gender Equality	Cooperation Agreement on Gender Health
Making Gender Equality a Pillar of the Institutional Strategy	
A Support to the University in Applying a National Law	External Networks to Strengthen the Action Plan Internally
A Synergy between the Action Plan and a National Programme on Gender	A Complex Cooperation among Universities
Helping the Organisation to Set Up its Gender Policies	An Increased Visibility at National Level and its Impacts in the Organisation
<b>AREA 4 – Sustainability</b>	
<b>17. Inclusion of gender in monitoring systems</b> <i>Permanent tools to monitor gender equality in the institution</i>	<b>18. Inclusion of gender in scientific excellence</b> <i>Shaping research organisations on a gender-aware idea of science</i>
A Permanent Observatory on Gender Equality	UNESCO Chair on Gender Equality Policies in Science, Technology and Innovation
A Database of Gendered Data Looking for an Institutional Stabilisation	An Award to Break Male-Dominated Practices and Views of Science
A Commission for Introducing Gender Budgeting	A Multiple-Action Strategy for Connecting Gender Equality and Scientific Excellence
A Research Group for Helping Managers to Address Gender Inequality	
<b>19. Inclusion of gender in provision and services</b> <i>New or extended services for emerging needs</i>	<b>20. Inclusion of gender in organisational standards</b> <i>Binding procedures to permanently introduce gender equality actions</i>
Extending the Benefits of Permanent Staff to other Targets	Mentoring as a Permanent Service Offered to Young Researchers
Services for Combating Sexual Harassment	Connecting Gender to a High-Quality Human Resources Management
Services and Provisions for Protecting Young Temporary Research Workers	Protocols and Guidelines Against Harassment
Helping Women Researchers to Commercialise Research Results	New Rules for Home Working and Support to Women Returning at Work
<b>21. Inclusion of gender in the organisational structure and mission</b> <i>Permanent positions and units devoted to gender issues and equality</i>	
Appointing a Rector's Delegate for Gender Studies and Equal Opportunities	
Giving a Wider Institutional Framework to Gender Equality Policies	
Inserting Gender Equality in all Relevant Institutional Documents	
Creating a Senior Position to Deal with Gender Inequality at Institutional Level	





# Introduction

All around the world, gender inequality in science is a long lasting problem, far from being solved. Despite some slow improvements, women remain insufficiently represented among scientists, mainly at top levels. In the European Union<sup>1</sup>, even if women account for 40/60% of the PhD graduates, depending on fields of study, still only 33% of researchers and 20.9% of academics in higher positions are female.

The European Union is committed to remove inequalities and to promote equality between men and women in all its activities, including research and innovation. In its nearly 20-years policy effort, the European Commission launched, in early 2010s, a strategy promoting structural change processes inside research institutions, geared at introducing gender equality and gender aware management in a permanent way, through dedicated projects and gender action plans. This strategy, started in the second part of the 7<sup>th</sup> Framework Programme for research and innovation of the EC, has been continued and intensified in the subsequent Horizon 2020 programme.

These Guidelines try to account for this effort involving many research organisations across Europe by providing interpretive frameworks and practical orientations to activate and sustain over time institutional change processes<sup>2</sup> in support of gender equality in science.

These Guidelines are based on the experience of both the TRIGGER (Transforming Institutions by Gendering contents and Gaining Equality in Research) project and – as we will see below – other EC-funded projects pursuing the same aim.

## **T**he TRIGGER project at a glance

The main objective of TRIGGER, funded by the European Commission under the 7<sup>th</sup> Framework Programme<sup>3</sup> and co-funded by the Italian Government<sup>4</sup>, was to promote gender equality and gender-aware research in five European research institutions by designing and implementing self-tailored action plans aimed to activate institutional change processes.

The TRIGGER Consortium is composed of the institutions listed in the table below.

Partner	Country	Acronym
Dipartimento per i diritti e le pari opportunità	Italy	DPO
ASDO	Italy	ASDO

<sup>1</sup> See She Figures, 2015, [https://ec.europa.eu/research/swafs/pdf/pub\\_gender\\_equality/she\\_figures\\_2015-final.pdf#view=fit&pagemode=none](https://ec.europa.eu/research/swafs/pdf/pub_gender_equality/she_figures_2015-final.pdf#view=fit&pagemode=none)

<sup>2</sup> The expressions "institutional change" and "structural change" are used alternatively in this text as synonyms.

<sup>3</sup> The project responded to the topic: "Supporting changes in the organisation of research institutions to promote Gender Equality" (SiS.2013.2.1.1-1).

<sup>4</sup> TRIGGER is co-funded from the Italian IGRUE (Inspectorate General for Financial relations with the European Union, Ministry for Economy and Finance).

Partner	Country	Acronym
Università di Pisa	Italy	UNIFI
Vysoka Skola Chemicko-technologicka v Praze	Czech Republic	VSCHT
Institute of Sociology of the Academy of Sciences of the Czech Republic	Czech Republic	ISAS CR
Birkbeck College – University of London	United Kingdom	BBK
Université Paris Diderot – Paris 7	France	UPD
Universidad Politécnica de Madrid	Spain	UPM
Istituto per la ricerca sociale	Italy	IRS

The five self-tailored **action plans** addressed **three different aspects** of gender inequality in S&T:

- ❖ Working environment, formal/informal culture and explicit/tacit rules
- ❖ Scientific research content and methods to acknowledge its gender dimension and impact
- ❖ Scientific leadership at different levels.

As a whole, within the five action plans over one hundred different actions were implemented, not mentioned here for space reasons (a short description of the TRIGGER action plans is included in the Appendix). To have an idea of the kind of initiatives and measures included in the action plans, see the table in the next page.

In the action plans, special emphasis has been given to the second aspect, i.e., the **gender dimension of research** and its interaction with the other two, given the growing recognition of its importance as a crucial lever for fundamental change in S&T settings ("fixing the knowledge")<sup>5</sup>. To this end, actions directly aimed at gendering research process and contents, such as sensitising and training researchers, funding gender-sensitive research, promoting courses and teachings including gender aspects in STEM (e.g., medicine, biology, engineering, city planning), creating multidisciplinary research groups etc., have been complemented by other actions, less directly aimed at gendering contents, but whose impact to this end is by now established (e.g., modifying scientific quality evaluation criteria).

Besides the action plans, TRIGGER also included the ongoing **analysis, monitoring and evaluation** of the process initiated in each institution with the aim of drawing some conclusions, both to support implementation and to feed these final project guidelines. ASDO was the partner responsible for these tasks, in direct contact with the project coordinator and in collaboration with the partners in charge of the action plans, which conducted research and evaluation at the action plan level. Additionally, a crucial role was devoted to discussion and exchange among the players involved in the different structural change initiatives throughout Europe, in order to share their efforts and results.

<sup>5</sup> An idea more and more widespread is that an increasing space for gender in research, favoring the full acknowledgment of its relevance in knowledge and deconstructing gender stereotypes in science, will also push sooner or later towards recognition of women researchers, thus entailing directly or indirectly a change in terms of gender equality in the research institutions.

STRATEGIC AREA		OBJECTIVES	DESCRIPTION AND SOME EXAMPLES OF ACTIONS
		1. Women-friendly environment	1.1. Actions promoting change in <b>organisational culture</b> and formal/ informal <b>behaviours</b>
1.2. Actions promoting <b>work-life balance</b>	Provision of services facilitating work-life balance, by means of <b>supporting access to internal and external services</b> of various kind and the promotion of <b>customised and flexible organisational practices</b> .		
1.3. Actions supporting early-stage <b>career-development</b>	Measures specifically aimed at sustaining early-stage career-development for young scientists, particularly addressing the barriers that women frequently meet in that early phase. These measures include <b>contractual arrangements</b> supporting temporary staff, <b>career advice, mentoring and training</b> for early-career researchers, provision of <b>funds for professional development</b> and <b>training officers in charge of hiring</b> and promotions.		
2. Gender-aware Science	2.1. Actions challenging gender <b>stereotypes</b> and consequent <b>horizontal segregation</b>	This is pursued, on the one hand, by addressing images and representations of women and science, especially through the <b>collection of data</b> documenting the groundlessness of stereotypes, the use of <b>gender-sensitive language and textbooks</b> , as well as <b>awareness-raising initiatives</b> . On the other hand, particular attention is devoted to fighting those mechanisms translating gender stereotypes into horizontal segregation, by attaching a gender to disciplines, topics or tasks. This is done especially by addressing <b>training initiatives</b> of various kinds to <b>those responsible for career development support and task attribution</b> .	
	2.2. Actions aimed at gendering <b>S&amp;T contents and methods</b>	Actions are aimed at questioning epistemological and theoretical assumptions, methodologies and priorities. <b>Research and dissemination activities</b> are usually undertaken in this regard, but also <b>curricular reform</b> of scientific disciplines to include relevant gender studies, <b>institutional or organisational arrangements</b> to increase the number of women research directors, and the <b>dissemination of tools to support the process of gendering the design of research</b> and innovation or funding devoted to gender-sensitive research.	
3. Women's leadership of science	3.1. Actions promoting women's leadership in the <b>practice</b> of research*	Measures supporting women in attaining leadership positions in the traditional academic career, encompassing, among the others, review of criteria to assess scientific quality, support for <b>mobility</b> , delivery of <b>specific training, mentoring</b> , provision of <b>dedicated funds for research</b> , creation of <b>reserved chairs</b> , introduction of <b>new institutional bodies or regulations</b> to redress gender imbalances.	
	3.2. Actions promoting women's leadership in the <b>management</b> of research*	Measures supporting women in attaining leadership positions in research management, including tools such as direct <b>support to access boards and committees</b> , introduction of <b>quota systems</b> , creation of <b>candidate' databases, lobbying</b> .	
	3.3. Actions promoting women's leadership in <b>scientific communication</b>	The third leadership field addressed concerns scientific communication, grouping the tools aimed at strengthening <b>women's visibility and role in the communication flow among scientists and to the general public</b> .	
	3.4. Actions promoting women's leadership in <b>innovation</b> processes and <b>science-society relationships</b>	The fourth objective deals with leadership roles in managing the relationships between science and technology, on the one hand, and social, political and economic actors, on the other, with a specific focus on the <b>management of the issues involved with technological innovation</b> .	

## **W**here these guidelines come from

The Guidelines are the output of an intense and highly productive **mutual learning and exchange process** involving the TRIGGER partners throughout the project. Such a process was planned from the beginning as a support structure for the Teams to learn from each other and to cope more effectively with the many aspects of their action plans.

This process was also enriched by a **larger exchange** entailing both the TRIGGER partners and representatives of another **eight EC-funded structural change projects** (EGERA, FESTA, GARCIA, GenderTime, GenisLab, GENOVATE, INTEGER and STAGES) who accepted, through a series of three annual meetings (respectively held in Rome, London, and Madrid), to share their experience, knowledge and challenges<sup>6</sup>.

The involvement of these "sister projects" was conceived not only as a way to support the Team, but also as a means to foster the **broader debate** taking place in Europe and beyond about **institutional change** projects to promote gender equality in science and technology.

When, in 2010, the EC DG Research and Innovation launched a new strategy for improving gender equality by initiating and sustaining structural change in research organisations, the motivations and objectives of this choice were clear. Indeed, the structural change strategy aimed at reforming research institutions so as to make them more inclusive and friendly to both women and men (the so-called fix-the-institution approach), while insuring women against having to adapt to a male-dominated working environment and culture (the fix-the-women approach).

After seven years, a wealth of information and knowledge about the nature, functioning and impact of institutional change projects is available. The basic idea underlying these Guidelines is precisely that of **attempting to integrate the collected information and knowledge** within a common frame. The intent is not to promote a unitary model of a "Gender action plan" (simply because a unitary model cannot exist), but to **provide orientations and analyses** to manage what may actually happen when, in a given research organisation, a gender action plan is launched (be it promoted by a specific project team, the HR Department, the Rector, the Head of a department or other internal stakeholders).

## **P**lans and processes

In pursuing this idea, a specific approach has been chosen, based on the elementary distinction between plans and processes.

The many gender action plans carried out so far in Europe allowed us to accumulate a large stock of practical knowledge<sup>7</sup>. As one representative of a "sister project" said while

<sup>6</sup> To favour the comparability of experiences and thus the exchange productivity, the choice was made to more directly involve the projects with a similar purpose funded in the same period (2010-2013).

<sup>7</sup> In the selected resources annexed to these guidelines some examples of handbooks, guidelines, and like drafted in the framework of the "sister projects" participating in the mutual learning path are reported. An effort to capitalise on the existing knowledge has been made by the EIGE through the Gender Equality in Academia and Research - GEAR tool. Making a Gender Equality Plan <http://eige.europa.eu/gender-mainstreaming/toolkits/gear>

participating in a mutual learning meeting, we know practically everything about what to do to design and implement a gender action plan. However, because of different factors – starting from the lack of real commitment to tackle gender inequality – action plans very rarely activate all the expected changes, even though other unexpected changes often occur.

Thus, the problem moves from how to design gender-oriented actions to how to implement them and produce tangible impact on the organization.

In fact, almost all those who are involved with gender equality plans find that correctly designing and managing the plans is not enough. There is always a **gap** (even small) **between the plan** as it is conceived and implemented, on one hand, and **the social process of change** which is actually activated on the other. This gap can be produced by a myriad of factors, including, e.g., leadership turnover, unexpected resistance, lack of support (such as by leaders, internal offices or women researchers themselves), conflicting interests, psychological dynamics, lack of resources, time constraints, lack of passion and personal commitment, difficulties in getting different stakeholders to cooperate with each other, cultural obstacles, organisational conflicts, or change in national policies.

Moreover, the combination of these factors may produce a **theoretically infinite number of situations** which can rarely be anticipated while designing a gender action plan, even though some **recurrent patterns and dynamics** can be observed both in the way in which the process of change develops and in the way in which the gap between the plan and the process of change is managed.

Thus, it may happen that, to induce change in an organisation, the plan has to be altered, the actions modified or some approach abandoned. Consequently, rather than being more or less linear in their development, gender action plans come to be characterised by drawbacks, changes of directions, and sometimes restarts, making each of them a "special case".

The effort made through these Guidelines has been precisely that of addressing the **process of change** leveraging upon the experience of the TRIGGER partners and the "sister projects", in order to better understand how it can be practically managed. Therefore, the key question underlying them is not how an action plan should be done but how a **process of change can be triggered and fostered through an action plan**, thus managing the unplanned and the unexpected and pursuing institutional change, when necessary, even by going beyond, modifying and/or abandoning some of the planned actions.

### ***T*he double meaning of institutional change**

To effectively address institutional change as a social process, the Guidelines adopt a **broad concept of institution**.

In general, institutional change is mainly used to refer to the idea of the **rules of the game** of a given organisation (existing procedures, guidelines, protocols, formal or informal regulations or

organisational charts). However, changing an organisation cannot only mean a change in the rules, but also and mainly a change affecting the **actors involved**<sup>8</sup>.

To attain this level – the level of the actors – another concept of institution is needed, one that belongs to the sociological tradition. In this disciplinary domain, the concept of institution refers to the **relational, cognitive, emotional and behavioural patterns** that largely contribute to the reproduction of social life, so that they tend to be taken for granted and shared by the majority of people<sup>9</sup>. In this deeper and extended meaning, the concept of institutional change relates, not only to the rules of the organisation, but also to the **life of people and groups**, thus affecting such things as ideas, beliefs, values, worldviews, interests, personal and collective orientations, social meanings, and emotions.

The Guidelines adopt both concepts of institution since, in the case of a complex, persistent and deeply rooted phenomenon like gender inequality, institutional change quite inevitably affects both the rules and the social patterns underlying them. More specifically, what usually emerges is that:

- ❖ Changing social patterns is necessary to sustain organisational change
- ❖ Organisational change is necessary to trigger a change in the social patterns and to keep on modifying them over time, so as to make them fully embedded in the life of the organisation.

## **A** multilayer view of change

Precisely to prevent a conflation between the two concepts of institution, a multilayer view of change was adopted from the beginning in developing the TRIGGER project and setting up the mutual learning process. Such a view is based on the recognition that institutional change, just because it concerns both the rules of the game and the actors involved, includes many aspects which are not immediately tangible, but which largely influence the possibility of change to occur.

Thus, very roughly, **affecting the actors** prevalently means activating **interpretive** and **symbolic** change.

- ❖ **Interpretive change** pertains to the way and the intensity with which gender inequality issues are perceived, in terms of size, importance, causes and effects, for example. This kind of change is strongly linked to the capacity of an action plan to raise people's awareness of gender inequality, to produce reliable information on the issue, to provide strong arguments in support of gender equality, or to arouse people's interests and emotions on gender.

<sup>8</sup> As regards the distinction between changes in the institution and changes in the organisation, see Coriat B., Weinstein O. (2002), Organizations, firms and institutions in the generation of innovation Research Policy 31, 273–290.

<sup>9</sup> In this regard, see : Berger, P. L., Luckmann T. (1966) *The Social Construction of Reality: A Treatise in the Sociology of Knowledge*, Garden City, NY, Anchor Books; North, D. C. (1990) *Institutions, Institutional Change and Economic Performance*, Cambridge University Press, Cambridge; Nadel S.F. (1951) *The Foundations of Social Anthropology*, The Free Press, Glencoe.

- ❖ **Symbolic change** pertains to the reference to gender issues in aspects such as language, communication, images, organisation of space and time, and in general in anything that can construct and transfer shared cultural meanings. At stake with symbolic change are issues like the visibility of women researchers, the self-esteem of women as scientists, the social representation of women and men in science, the shaping of organisational culture and the image of science.

Similarly, **changing the rules of the game** mainly means triggering **normative** and **operational** changes.

- ❖ **Normative change** pertains to the arrangements formally or informally adopted within the organisation and their explicit or implicit impacts on gender-related issues. Normative change, in addition to formal decisions, also includes change in habits and informal procedures as well as the creation of new entities and functions (e.g., networks, officers, groups, organisational units), regardless their legal status.
- ❖ **Operational change** pertains to the mechanisms (of any nature, such as administrative, political, technical, organisational, or bureaucratic) allowing a change to occur and to produce actual modifications. This kind of change is often overlooked although its importance is evident to all who work in complex organisations. Actually, a change in the rules of the game does not occur when a decision is taken or a position for a new officer is established (normative change), but when the decision is implemented and continues to be implemented over time, or when the new officer is provided with all the resources, powers and means to perform her/his tasks and duties (operational change). It is to be noticed that it is sometimes easier to attain normative change rather than operational change, since a lot of resistance and hindrances are found at an operational and not at a normative level.

## **A**n experiential approach

Since the Guidelines are focused on the process of change rather than on the action plans, **they do not adopt a prescriptive approach**. Indeed, we did not feel capable of providing precise directions or recommendations, as the social processes involved with institutional change are intrinsically complex, and they entail such a large share of unplanned and unexpected aspects.

Rather, the Guidelines adopt an **experiential approach**, i.e., an approach intended to provide information and orientations useful in promoting and capturing different aspects of the process of change, singling out their recurrent patterns, drivers, barriers and implications as they emerge in the practical experience of the teams who carried out the gender action plans.

This is the reason – as we will see below – why each aspect dealt with in the Guidelines is always supported by two, three or even more **cases**, drawn from different national and organisational contexts. The presentation of these cases is aimed at showing not so much the actions carried out as the dynamics of change these actions activated, including the obstacles and constraints encountered and the final results they produced, be they expected or not.



## **M**odelling the process of change

In accordance with the overall approach sketched above, the structure of the Guidelines also reflects a focus on the process rather than on actions.

In fact, the Guidelines are not organised in **thematic areas** or **objectives** (for example, collecting gendered data, providing mentoring and training, changing hiring and promoting procedures, supporting work-life balance, etc.).

Rather, they are structured on the basis of an **elementary model of the institutional change process**, large and open enough to integrate information and cases from different contexts, action plans and projects.

Such a model was developed not only in the light of the **results** that action plans can achieve, but also the **risks** which may affect them. This choice was made in consideration that it is also possible for an action plan to produce some immediate results without generating any institutional impact (i.e., any permanent or long-term cumulative changes)<sup>10</sup> because of the influence of risk factors making change more difficult to take root.

Operationally, and conventionally, the model includes **four different components of the change process**, which develop and interact with each other throughout the implementation of a gender equality action plan. These components constitute the backbone of the Guidelines.

**Transformational agent.** This component concerns the process by which a group of people (a team) progressively becomes a transformational agent within its organisation, i.e., an actor able to access the many skills, capacities, resources and knowledge which are needed to manage the complexity inherent in institutional change. The risk here is establishing a team which lacks, due to internal or external factors, the competences and internal authoritativeness to trigger institutional change.

**Activation and mobilisation.** This component concerns the process by which the gender action plan succeeds in mobilising and involving other actors and individuals, achieving the consent, energy and support necessary to trigger a process of change. The major risk here is that the action plan remains invisible or in any event too marginal to induce changes in the organisation (both in terms of rules of the game and dominant social patterns).

**Making an impact.** This component concerns the capacity of a gender action plan to actually alter existing institutional arrangements, activating a process of change. Since no deterministic relationship can be established between an action and its impact, the main issue here involves observing the factors and risks which make it more or less probable that an action generates permanent or long-term modifications in the life of the organisation. Action plans, indeed, can potentially catalyse change which can be long lasting or able at least partially to disrupt the status quo.

<sup>10</sup> As regards the distinction between results and impacts, see: European Commission (2015) *Horizon 2020 indicators. Assessing the results and impacts of Horizon*, Directorate General for Research and Innovation, Luxembourg: Publications Office of the European Union.

**Sustainability.** This component concerns the capacity of an action plan to activate mechanisms allowing it to keep generating impacts after completion. As mentioned before, such mechanisms cannot be only those formally securing organisational change (such as new norms, structures, procedures, etc.), but also those introducing, so to speak, social levers of change ensuring a constant improvement of gender equality in the long run.

A **specific section** of the Guidelines is devoted to each component including an **introduction** and a number of **chapters** (ranging from four and six), each highlighting a specific strand of action characterising the component, and a **summary** of the key points about obstacles, risks and practical orientations.

Each **chapter**, in turn, includes **two paragraphs**. In the first, the contents and features of a strand of action is presented. Then, in the second, a series of cases are presented, highlighting the process and providing examples about how it can be managed<sup>11</sup>.

For confidentiality reasons, the cases are all presented preserving the anonymity of the teams and the other actors involved. Only in some cases, presented in specific boxes, is the information fully disclosed in accordance with the teams' consent.

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<sup>11</sup> As any theoretical model, also the elementary model of the process of change is necessarily conventional. For this reason, the use of the cases to illustrate a strand and a component of the process may turn out arbitrary. However, both the model and the placement of each case have been discussed with the teams involved in the action plans.



## AREA 1 – Transformational agent

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*Institutional change always involves the commitment of many actors. This is even more true when an issue so complex, so socially rooted and with so many implications as gender equality is at stake.*

This simple consideration makes it possible to identify the **first component** of the process of institutional change in what we may refer to as the "**establishment of the transformational agent**".

The notion of "transformational agent" refers here to a group of people, even small, but endowed with, or capable of catalysing the skills, capacities, qualities and motivations necessary to promote institutional change by mobilising other individuals, stakeholders and leaders.

Being a team is therefore different from being a transformational agent. As the cases of the teams that cooperated in developing these Guidelines clearly show, all of them initially met, to varying degrees, serious difficulties in "activating the process", which did not simply mean implementing the planned actions. To activate an internal change process on gender arrangements, indeed, the teams needed to be able to access all relevant information, knowledge and expertise, as well as human and financial resources; they needed to be

situated in the right institutional position; and they needed to progressively become authoritative enough to attract people's and leaders' interest towards gender issues, involving the concerned organisational units or making the action plan visible and recognisable.

Thus, we can define the establishment of the transformational agent as a **process** by which a **team becomes a transformational agent** while implementing the action plan over time; a process with its own steps, constraints, timing and obstacles.

The aim of this first section is precisely that of better understanding this process.

The information gathered through mutual learning allows us to distinguish at least **four strands** within this component:

- ❖ Accessing expertise
- ❖ Reputation building
- ❖ Organisational embedment
- ❖ Securing staff and resources.

## 1. Accessing expertise - *Knowledge and skills to manage gender dynamics*

### THE ISSUE

The first move that teams usually make is to acquire or access the capacities and skills necessary to start the action plan.

In fact, it usually becomes very soon clear that **standard management or communication skills are not sufficient** to design and implement a gender action plan.

Gender inequality is in fact a multifaceted phenomenon, reproducing itself in many ways, through mechanisms that are often hidden, subtle and difficult to detect. Moreover, the interest and motivation of people, leaders and even women on gender equality issues cannot be taken for granted, the presence of gender inequality in the organisation is often a controversial issue, and the activation of a gender action plan is not necessarily welcome by everyone.

All this makes it soon necessary to mobilise different kinds of expertise, revolving more or less around gender equality issues, including aspects such as capacities to identify inequality dynamics, negotiations skills, or data management skills.

Hence the need for a team to access the capacities and skills they need, especially by **involving the experts and groups** able to provide them. What is at stake in this process is the actual possibility for the team to design and manage a gender action plan in the organisation.

### THE PROCESS

The most rapid way to address this need is to **create stable cooperation** with the units and officials already involved in the concerned issues, such as the Gender Equality Unit, the Human Resources Department, or the leaders in charge of gender issues. This also increases the visibility of the action plan within the organisation. However, many variables may come into play while pursuing such a strategy. The cases presented below provide some insight in this regard.

- ❖ **Case 1** shows the importance for a team to address the problem of securing the relevant expertise from the very beginning by **establishing cooperation agreements with internal key actors**. The case is also meaningful since it highlights how a change in the leadership or other similar policy changes may jeopardise the agreement or make it more difficult to sustain it over time.
- ❖ In **Case 2**, a similar strategy was successfully adopted. The case is interesting in that it highlights the problem of coordination and synchronisation among the actors involved. In fact, the different units providing gender expertise in the organisation do **not necessarily share the same agenda and views** about gender equality issues, so that cooperating with them may become a time-consuming activity for the team.
- ❖ **Case 3**, in turn, shows that **organisation procedures and rhythms are not necessarily the same as the team's**, with the consequence that, to keep cooperation effective, the team has to modify its plan, reduce its expectations and, sometimes, slow down its activities.

Another source of expertise for a Team can be found by establishing forms of cooperation and exchange with **other teams** working on gender equality in different institutions. This is typically the situation of partners in EC-funded institutional change projects.

The case presented in the **box** below shows **another possible solution**, i.e., backing the team from the beginning with an expert team on gender provided by an external institution. Such a solution proven to

be effective, even though it usually requires the teams involved to have the capacity to communicate and openly share data and information.

#### GENDER EXPERTS, SCIENTISTS AND ADMINISTRATIVE OFFICERS

Four out of five core teams of the TRIGGER action plans combine managerial and organizational competences in the field of gender equality and gender-related research profiles. In the Czech Republic, instead, this result was achieved through the close collaboration of two different institutions (VSCHT, a technical university and ISAS, a sociological research institute). This composition of the teams facilitates the in-house design, as well as the implementation, of an integrated set of actions, encompassing social research, training, advocacy, networking and public communication.

### THE CASES

#### Case 1 – PLANNING THE INVOLVEMENT OF EXPERTS FROM THE BEGINNING

**The starting point.** In one institution, an extended team was created before the start of the project, already including representatives of the scientific staff in the different schools involved and the Gender Unit of the University. This choice was due to the characteristics of the institution, a technical university, where there was the need to create a link among different research lines, schools and departments (where gender contents and expertise were present to different extents), and the management team of the University.

On the one hand, it was necessary to take advantage of the knowledge of the university structure and procedures which was held by the Gender Unit, which was part of the rectorate.

On the other, scientific knowledge of gender contents and methods of the technical disciplines represented in the university were held by the senior and junior researchers that were part of the team.

**The dynamics.** In the first part of the project, cooperation was very effective, thanks also to the prestige of the team coordinator and the reciprocal support among the team members, not limited to common work on gender equality. This enabled the

differences in perspectives, background and language between scientists and administrative or managerial staff to be overcome. A change in the management of the institution modified this scenario. The new rector and his staff set different priorities and had different ideas about gender equality, mainly affecting the work of administrative and managerial staff. Gender was subsumed under more generic headings, together with other equality issues, without increasing the number of employees devoted to equality. As a consequence, friction among team members occurred, which at times hindered fruitful cooperation. With time, informal arrangements were found by the team to adapt to the new circumstances, which allowed internal difficulties to be overcome and to move forward with the project's actions.

**Some results.** The mixed composition of the team made it possible to design and implement actions of different kinds, addressing various audiences (students, researchers, technical personnel, etc.), both based in the schools and at university level, always maintaining relations with top leaders and external actors (e.g., local authorities, representatives of other universities, professional associations etc.). Some changes were introduced with respect to the initial plans to adapt to internal dynamics.

#### Case 2 – FINE-TUNING THE AGENDAS

**The starting point.** In the experience of one of the structural change projects, the cooperation between scientists, gender experts and gender officers at each partner institution was actively sought, supported by

the project coordinator, through the implementation of initial gender audits. The partners were heterogeneous from the institutional, organisational and geographical points of view, so that cooperation

was shaped in different ways according to local situations. For example, only the biggest organisations had equality committees or other institutional bodies in charge of gender equality, and gender expertise was not always present. In other cases, gender equality competence and sensitiveness was only held by individual researchers or team members, some of them hired specifically for the project.

An effort was made to find synergies in implementing the gender audits through activities in which each actor could find a specific role and benefit. The audits allowed the team to make contact with persons who were subsequently involved in further project activities, either becoming members of the team, or participating in working groups for specific activities.

**The dynamics.** The initial endorsement of the top management of the institutions was a factor which facilitated the participation of different kinds of

personnel, both scientific and administrative, in the project teams. Another strong plus for being involved was the availability of funds to implement an organisational diagnosis of the institution, which could be useful for different purposes.

On the other hand, there were aspects which appeared problematic for activating internal cooperation, such as the existence of different equality agendas between project teams and equality bodies, where existing. Another situation which was quite common and had to be managed was the relative isolation of gender equality bodies, worsened by the stigma of women-only bodies and initiatives.

**Some results.** The initial effort of implementing gender audits allowed the teams to involve the most influential representatives of their institutions and to make them aware of project objectives and activities, establishing good relationships.

### Case 3- ADAPTING TO THE RHYTHMS OF THE ORGANISATION

**The starting point.** The project focused its efforts on researchers on fix-term contracts. However, the necessary data on research group composition were not centralized and not organised by gender.

**The dynamics.** The team had to request the needed information department by department, through long work sessions with the staff responsible at department level. Each time they had to explain how important it was for the project, playing on personal trust and contacts, avoiding forcing too much with requests and keeping good relationships also beyond the needs of the project.

The project had an innovative approach, which entailed time-consuming and complex data collection, sometimes requiring the re-processing of collected data or accessing data considered confidential. During implementation, the team needed to reduce somewhat the details of data collection and to partially adapt their timing to the schedules of the staff involved. On the other hand, the project was well known at the

University among researchers, and the involvement of some representatives of the top management made it possible to reach all the relevant people to collect data and start actions. The cooperation with the committee in charge of equality – which was built during operations – as well as the fact that the team leader was the rector's delegate for gender equality (later appointed pro-vice rector for gender equality) further supported the data collection process. Finally, the central administration expressed interest in the results of the work done (e.g., processing of new data), which made cooperation with different people in the organisation easier.

**Some results.** The initial contacts established with the administrative staff for the aim of data collection helped to spread the word about the project and to gain consensus. The effort to maintain good relationships with the administration, and the feedback provided on the results of the analysis produced the further benefit of convincing some of them to partially revise their procedures.

## 2. Reputation building - *Visibility and legitimacy of the teams*

### THE ISSUE

As can be expected, scientific reputation is a major source of authority in scientific institutions, on which internal hierarchies and social status depend. Thus, it is not without consequence that gender equality plans are often carried out by teams partially or even totally made up of people such as early-career researchers, temporary staff members and administrative personnel; i.e., **people who are not recognised as scientifically prepared or institutionally legitimate** to lead some or many of the activities connected with the implementation of an action plan, such as collecting and interpreting statistical data, participating in high-level committees, negotiating with the top management and drafting reports and documents of a scientific or strategic nature.

To become a transformational agent, therefore, the team often has to address the problem of **increasing its own reputation and visibility** within the organisation, so as to balance the low social status of one or more of their members and make it possible for the action plan to be smoothly and effectively conducted. There is the risk of establishing a team which is not recognised as authoritative, competent and capable enough to attract and activate other actors and individuals.

### THE PROCESS

The **reputation-building process** mainly develops by establishing a coalition between the team and other authoritative actors. This process is practically implemented in different ways. In some cases, teams are enlarged with the involvement of highly-reputed scientific members of the organisation. In others, strong linkages are created with relevant organisational units (for example, the Human Resources department, the gender unit, etc.), compensating for the lack of scientific reputation with institutional recognition.

Another important component of the reputation-building process is the **visibility** of the Team in the internal and sometimes external arena. In this case, the process may be promoted by organising public initiatives or scientific conferences, for example, allowing the visibility of the team members to grow, or getting visible support by the leadership in public occasions.

The team's lack of reputation may have, as a primary consequence, the **marginalisation** of the action plan and of gender equality issues in general. In some cases, the low status of the team can indeed be interpreted as the practical demonstration of the low priority of gender equality in the organisation.

The cases presented below highlight the complexity and uncertainty of this process.

- ❖ **Case 1** describes an attempt made under a project involving different research institutions to promote explicitly the role and visibility of PhD students and temporary employees in charge of implementing the action plans. This choice had some relevant impacts, even though it generated strong **resistance** among senior researchers, especially when one junior researcher was appointed project coordinator in one of the universities concerned.
- ❖ **Case 2 highlights** the **many variables** which may come into play in increasing or decreasing the team's reputation within the organisation. In this case, even the general public debate about gender theories had an influence, together with other events and processes (such as leadership turnover, a structural reform of the organisation and a shortage of funds), in modifying the way in which gender equality issues and the teams promoting them can be perceived and socially recognised.



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## THE CASES

### Case 1 – FOCUSING ON YOUNG PEOPLE

**The starting point.** In an EC funded project focusing on early-career and temporary researchers, the project teams were mainly composed of young researchers with fixed-term contracts. The results of the initial research, creating the knowledge base for the project's action plans, showed that temporary employees tended to disappear after the expiration of their contracts. Consistently with the philosophy behind the project, the choice was made to make the work of these categories of personnel visible, so that coordinators and WP leaders were not the only ones to present the project, to speak in public situations or to publish articles about it.

Another important consequence of the project approach was to entrust a non-tenured researcher who played a decisive role in the process of design, application and financing of the project with the role of project manager at her University (the one coordinating the European consortium) and her subsequent appointment as scientific coordinator, once the previous incumbent had taken the role of pro-vice rector. The aim was to have her past and present merit acknowledged. This opened a formal problem, since in the country where she is based (as opposed to what is stated in the European Commission legislation) researchers who are not permanent employees cannot be formally in charge of European projects as scientific coordinators.

**The dynamics.** The initial decision to give visibility to researchers on fixed-term contracts was a sort of trademark of the European project. It was put into practice whenever possible by all project partners in their action plans. Their sensitivity to this aspect facilitated the implementation of this practice.

A different reaction of some senior researchers of the department where the project was based was triggered by the appointment of a non-permanent employee as project scientific coordinator. This practice was seen as a bit too much by many executives of the administration, who alleged its supposed inconsistency with national and European law, and opposed by some professors. So, opposition was strong and negotiations were long. Meanwhile, the team discovered that non-tenured researchers were project scientific coordinators at some other departments of the same university. The change was anyway slow, and the procedures during the transition intricate.

**Some results.** During the project period, young people often told the project coordinator that they had been recognised at conferences, something important to build their own network. The practice of entrusting a non-tenured researcher as EC project manager sets an interesting precedent for the recognition of a very frequent phenomenon, namely the importance of unstructured researchers in drafting and applying for funded research projects.

### Case 2 – STRUGGLING FOR VISIBILITY IN A COMPLEX ENVIRONMENT

**The starting point.** At one university, with a long track record in commitment to gender equality, a Gender Equality Office was created and a gender policy has been in place since 2010. The start of the institutional change project raised the level of expectations around the possibility of implementing a wider range of actions, not only at University level, but also in a larger network of local universities.

During the project lifespan, the Gender Equality Office had the opportunity to promote new actions, while others were extended to the network of universities. This brought an increase in the visibility and reputation of the Gender Equality Office, despite its limited staff (only three people, two of whom employed through temporary contracts, thanks to project funds). No additional personnel were hired to handle the new commitments, despite the reiterated

requests of the project team, due to the contingent situation of the national reform of universities and the shortage of funds.

**The dynamics.** Some external factors came into play during the project. At the national level, on the one hand, new laws on equality entered into force, also affecting public universities, so that gender equality was included in the public agenda. On the other hand, the on-going national reform of the higher education was imposing huge restructuration processes on universities, with the subsequent reallocation of personnel and budget. In this framework, the external political debate on gender theories, often questioned as non-scientific and strongly ideological, started to have an influence on the status of the staff in charge of gender equality issues.

In the organisation, different and sometimes opposed positions emerged towards the need to strengthen the gender equality office. The newly elected president was initially less supportive towards the gender equality policy within the institution and less inclined to enhance efforts in this direction. Other top leaders, instead, members of the project think tank, expressed their endorsement.

**Some results.** The extension of the project's actions to a larger network of local universities, as well as the intensification of public initiatives on gender equality, had an important impact on the working conditions of the project's team members. If on the one hand this situation was very challenging for them, it made the action of the university on gender equality more visible and highlighted the project's results. Furthermore, it reinforced the support of the leaders of the University for the Team.

### 3. Organisational embedment –

#### *Internal networks in charge of gender equality actions*

#### THE ISSUE

A third strand pertaining to the creation of a transformational agent refers to its capacity to be actually **embedded in the organisation**.

Indeed, there is always the risk that a team becomes confined to specific sectors of the organisation (for example, some departments, some specific professional groups, etc.) and for the action plan to be known just within a restricted circle of promoters (be they gender equality officers or experts in gender studies).

How the team and the action plan may become deeply integrated in the organisation depends on many factors, related to the very features of the action plan and the organisation, but also on the dominant issues challenging the organisation in a given moment. Embedding the team inevitably implies **networking activities**, allowing the team to act in different parts of the organisation simultaneously. The main risk connected to the lack of organisational embedment is that the team remains isolated and unable to establish bridges with and among key stakeholders and organisational units.

#### THE PROCESS

The concepts of network and networking are broad enough to include situations which are largely different from each other. Two examples are provided in the cases presented below.

- ❖ **Case 1** presents a network involving female academic staff, from PhD students to associate professors established within the university, to promote women to top leadership and academic positions. Almost immediately, some problems arose in the **relations between this network and an already existing network of women full professors**. The case is interesting since it shows that the organisational embedment of the team may sometimes be hindered by other actors or initiatives similarly aimed at promoting gender equality in science. However, it also highlights that, once effective forms of cooperation are established, the connection with pro-women actors may have multiplying effects on the process of change.
- ❖ **Case 2** is different. In this case, an institutionally-recognised **network of referents** to support the action plan was created, so as to promote the implementation of gender equality actions in all relevant areas of the organisation. This network undoubtedly played a key role, even though its establishment had some significant repercussions of an organisational and especially of a political nature, which the team had to address by developing specific strategies.

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 THE CASES
 

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**Case 1 – PROMOTING SYNERGIES AMONG NETWORKS**

**The starting point.** As part of the project in one of the universities involved, a network of female academic staff, from PhD students to associate professors, was created in the first project year. The main aim of the network was to contribute to the advancement of academic women to higher positions by facilitating meetings in which they could share experiences and work together on their personal and professional development, while possibly also standing up together for issues related to women in the institution. This network complemented the existing university network of female full professors.

**The dynamics.** The positions of chair, treasurer and secretary of the network were initially all taken by PhD students. Since this network visibly represented the younger generation, this increased the legitimacy of the network and increased, although progressively, the acceptance of the network by the existing network of female full professors. The network became very active during the first project period. During the four-year project lifespan, it organised a series of eleven successful meetings (both lunch meetings and lectures) and a conference and became institutionally supported by the university with an annual budget. Besides this, the members of the network were also involved in other project activities held in their respective departments.

Along project duration, at least two major difficulties

arose, progressively overcome.

The first was the latent conflict with the existing network of female full professors at the University, which was already an interlocutor for the top leadership of the university and had some reluctance to accept the inception of a new initiative. This required a supplementary effort of negotiation by the project's team leader, whose role was very important in facilitating the dialogue and identifying common objectives and cooperation strategies.

The second was caused by the intense voluntary work that the network occasionally required, which was particularly borne by the core group, whose involvement was less formally defined in the project. This factor led to some tension and to one case of burn-out. Extension of the core group and turnover were required to restore the situation.

**Some results.** After three years of existence, the network was recognised as a conversation partner in setting university equality policies. Its members reported that their visibility had increased thanks to their work in it. Together with the full professors' network, it has a critical mass that supports the development of gender equality policies. In return, the university board provides financial and administrative resources to support the networks.

**Case 2 – THE PROS AND CONS OF INSTITUTIONAL NETWORKS**

**The starting point.** Once the university was informed of the project's funding, one of the initial activities – which became a main aspect of its structure – was the creation of an internal gender equality network of referents, including scientific and administrative personnel as representative of all the departments and services. This network was intended to be the backbone of the project, and more in general of the university's gender policy, since its members provide information on the actual needs of the departments they are working in, share information on the project and link with the top and middle leadership.

**The dynamics.** The impulse to launch this new network was given from the former president of the University, a nationally renowned supporter of gender equality in higher education. The project team was in charge of collecting spontaneous candidatures from each service and department of the university, to be

subsequently ratified by the University's Local Council. The network meets in plenary twice a year, but is constantly in touch with the project core team to organise activities (trainings, seminars, campaigns etc.).

The project team's initial idea was to use the referents to spread the gender policy throughout the organisation. During operations, it was seen that these people, due to their position in the university (some of them were members of elective bodies and/or were influential professors), could also have a more political role in enhancing internal support for the project and gender equality activities. However, this political role has sometimes resulted in opposition towards some project initiatives and their subsequent slowdown or rescheduling.

Another problem which occurred after the initial enthusiasm, was a certain stagnation and passivity in the participation of the referents in the meetings, more frequent among administrative staff. To overcome the passivity and prevent defections, the team tried to assign a specific role to each one in the drafting of the new gender plan of the university.

**Some results.** Once activated in an effective way, the network started to constitute real support for the project. As regards the activities, the referents are in some cases co-organisers, and are able to convene researchers into project activities, extending the reach

of the core team, mainly composed of gender officers. They have been involved in preparing the institution's triennial gender action plan, which encompasses the continuation of some project activities. Besides this, network members are also active in organising new actions related to topics close to those of the project (e.g., forms of discrimination other than gender). As for internal policy, they actually helped the core team to gain support from the top management, actively contributing to their legitimization and institutionalisation and extending the scope of the gender policy throughout the university.

## 4. Securing staff and resources – *Stable staff and resources for gender equality actions*

### THE ISSUE

There is at least another process which is involved in the evolution of a team into a transformational agent, and it concerns the achievement of adequate stability and resources both for team members and for actions to be implemented, making the best use of, and integrating the project budget.

This may imply different aspects, including: job stabilisation for team members in charge of the action plan, so as to ensure they have appropriate working conditions; securing adequate levels of funding and adequate funding procedures; making all the resources available when they are needed; reducing the amount of voluntary action in the daily functioning of the team.

All in all, securing staff and resources means preventing the risk of starting something which cannot be completed, or diverting energy and time of team members from the main objective of implementing the action plan and involving other actors in it.

### THE PROCESS

Three cases have been selected on this topic from the experience of TRIGGER partners and sister projects.

- ❖ **Case 1** is an example of how important it is to provide the team with adequate resources to promote and manage the gender equality initiatives encompassed in the project, the implementation of which requires full-time engagement, so that people are actually able to work in proper conditions.
- ❖ A similar message can be drawn from **Case 2**, where the need to provide the team with a full-time coordinator clearly emerged, so as to ensure continuity for the activities.

Finally, in the box below, a report of a TRIGGER partner highlights the fact that providing stable working conditions for team members may also have direct positive impacts on the action plan.

### STABLE GENDER OFFICERS

During the first year of the TRIGGER project, the Paris Diderot University decided to open a permanent position for its gender equality office. The coordinator of the French TRIGGER team, having worked on a temporary basis in the office for four years, passed the selection and was hired at the beginning of the second year of the project. This position also allowed her to successfully put forward her candidature in some elective bodies of the university, thus increasing her opportunities to introduce gender issues to different audiences.

## THE CASES

### Case 1 – SUCCESSFUL CO-FINANCING STRATEGIES

**The starting point.** The structural change projects were co-funded by the EC and partner institutions were required to finance the remaining 30%. When recruiting new partners, the coordinator of a structural change project needed to make it clear to potential partner organisations that this was not unreasonable, as gender equality work has a cost and cannot be done, for example, by female researchers without compensation, as is often the case. That is, the project would only be a kick start, and in the long run the institutions would have to pay for gender equality work anyway. It was necessary to point out that the project's funds should stimulate and not replace institutional commitment to gender equality.

**The dynamics.** In the submission phase, creating an intentional consortium with partners able to commit their institutions, which were not always very interested in a gender equality policy, to co-fund the

project was not easy. On the other hand, the ones who achieved this result had, in the written commitment to co-fund, a countermeasure in cases of possible disengagement, for example due to a change of institutional leadership during the project's life.

Once they had decided to participate in the project, indeed, several of the partners managed to get additional funds from their institutions, to start new initiatives (quite various since their starting points were heterogeneous). These funds were sometimes designed to last beyond the end of the project.

**Some results.** Despite their different initial conditions, the project partners were successfully involved in project actions. Most of them, after the end of the project, succeeded in continuing some elements of gender policy in their organization over and above European funding.

### Case 2 – ENSURING A FULL-TIME COORDINATOR

**The starting point.** One project partner in an EC-funded structural change project had devised a rich and articulated action plan, which was implemented under the responsibility of a differentiated group of people (both located in research departments and in the central services of the institution), all of them working on a part-time basis. The project coordinator had a role at the rector's office, supporting European project design and management.

**The dynamics.** The position of the project coordinator helped her reach out to different kinds of people and the top leadership of the institution, giving the gender action plan a certain visibility. However, in a period of intense change of national higher education

laws, her institutional responsibilities made it difficult for her to keep up with all the deadlines and project actions. As a consequence, some actions had to be delayed due to the work overload of both the coordinator and other persons (who were working part-time). At the end of the project's first year, the decision was made, also on the advice of the external evaluators, to appoint a project manager to give continuity to the project's action.

**Some results.** The additional investment in human resources expressly devoted to the gender action plan has allowed the team to implement a comprehensive action plan and to start a path towards consolidating its results after the conclusion of the project.

## Transformational agent

### *Key issues*

Turning a team into a transformational agent is undoubtedly a process which requires time, attention, and specific efforts. **Four main strands** fostering this shift have been highlighted, i.e.:

- ❖ **Accessing expertise** (the team acquiring or accessing the capacities and skills necessary to start the action plan)
- ❖ **Reputation building** (the team increasing their reputation and visibility within the organisation)
- ❖ **Organisational embedment** (the team taking root in different parts of the organisation through networking)
- ❖ **Securing staff and resources** (the team and team members accessing adequate working conditions and resources to carry out the gender action plan).

Probably, other aspects should be also considered.

Even though it is impossible to provide specific recommendations and guidance on how to drive such a process, some key issues can be highlighted on the basis of the cases which were presented and, broadly speaking, of the mutual learning activity carried out throughout the TRIGGER project.

**Taking the complexity of the action plan seriously.** All the cases presented and aspects highlighted converge to show how many variables come into play in the implementation of an action plan. Working on gender issues is not like working on any other organisational aspects of an institution. Gender inequality is a widespread, persistent, and deep social process, crosscutting cultures and societies, and it cannot be addressed through simple policy measures or communication initiatives. Hence the need for

a team to develop over time, through experience, learning activities and the involvement of other sources of expertise, into a true agent of transformation able to cope with the complexity inherently present in a gender action plan and in the specific environment it is addressing.

**Widening the space for gender equality issues.** The "space" available for promoting gender equality in research institutions is usually small, the awareness and interest of leaders – whose support is essential to attain long lasting impacts – is often limited or discontinuous; gender equality is not perceived as a priority or even as an issue by many researchers, including many women; the size and impact of gender inequality is often a controversial issue; in a context where competition among researchers, research institutions and universities is rapidly increasing, time and interest to address inequality is normally low and gets easily saturated. Thus, increasing the reputation and visibility of the team, activating networks able to reach out to different parts of the organisation, or enhancing the capacity of the team to deal with gender dynamics can be considered as requirements for widening such a space, so as to make gender equality a viable perspective for change.

**The misleading view of volunteering.** Addressing institutional gender issues is often seen as outside a normal academic portfolio, and is instead taken up as volunteer service. Failure to understand the impact of structural



barriers to women on institutional productivity and effectiveness, and leaving design and management of gender action plans to a small group dedicated to the 'good cause' of gender equality undermines the likelihood that a gender action plan will advance the status of the women and of the institution. This approach underestimates the costs of gender equality actions, especially as concerns the costs of human resources. Instead, the team should be a team of professionals with complementary skills who devote time and energy to the plan on a full-time or part-time basis, and are adequately compensated for this. The involvement of people and actors on a voluntary basis is obviously necessary, but providing adequate status and compensation for the team most directly in charge of implementation is essential.

**The sense of ownership of the action plan.**

Another aspect for which a transformational agent is needed concerns the "sense of ownership" of the gender action plan. Often funded or promoted by the EC or external actors, action plans are not always perceived by leaders, central offices and personnel as part of the activities, priorities and objectives of the institution. This often makes it difficult for them to get involved or to stay involved over time, because of the lack of a sense of ownership about the action plan. Hence the need for the team to become visible, to gain internal reputation, to be structurally embedded in the organisational charter, and to get additional resources from the organisation itself, so as to promote this sense of ownership and to make the action plan a part of the ordinary life and the strategic priorities of the institution.

## AREA 2 – Activation and mobilisation

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The second component of the process of change, as it is conventionally modelled in these Guidelines, is the **activation and mobilisation** of internal and external stakeholders and individuals.

Changes limited in scope and application, or with little implications for employees or external parties, are not likely to need a great deal of mobilisation and support. But when change is expected to influence practically all the aspects and levels of a given organisation, the question of why and how to activate institutional stakeholders and employees becomes crucial.

This is obviously the case for **gender equality issues**. Changing the state of things in this domain is simply impossible if change is promoted or sustained by few and ignored by many (or even opposed by some). It is not simply a question of consensus-building; rather, it is a question of providing the change with the necessary **social energy** and **human resources**, addressing resistance and organisational stickiness.

In this perspective, action plans can also be viewed as a device **for mobilising and coordinating actors and individuals** –

each one with their own interests, expectations and views – and driving them towards negotiated objectives of gender equality.

Limited mobilisation of actors exposes an action plan to the **risk of marginality and irrelevance**, with respect to both organisational strategies and the professional and personal life of researchers and employees.

This section deals with this process, which is vital for the success of an action plan. On the basis of the experiences discussed in the framework of mutual learning, **six strands** of such a component have been identified:

- ❖ Scientific recognition
- ❖ Political backing
- ❖ Engagement space creation
- ❖ Mobilisation of pro-women actors
- ❖ Active involvement of men
- ❖ Implementation backing.



## 5. Scientific recognition -

### *Scientific methodologies to increase awareness and ownership*

#### THE ISSUE

In scientific domains it is particularly important to counter the idea that the presence of gender inequality is not scientifically proved, or that approaches and tools adopted to ascertain inequalities are not methodologically correct.

This situation is not infrequent. Scientists are prone to think that personal merit is the primary parameter around which science revolves. Even though such an inclination is usually mitigated by personal experience and more realistic considerations, it can be difficult for many of them (including women) to recognise that relevant aspects and mechanisms of their own research organisation are strongly influenced by gender bias and stereotypes.

Hence the need for an action plan to **get scientific recognition** by generating data and information which are able to make gender inequality a scientifically grounded fact, as well as by adopting a language which can be shared by the community of scientists, and developing actions which are methodologically sound and substantively convincing.

This issue is necessarily connected to that of the reputation of the team, discussed in the previous section. Providing gender issues and the action plan with a recognised scientific basis is relatively easy for a team made up of people with a good scientific reputation. However, it may also happen that reluctance to recognise gender bias in one's own scientific organisation is so widespread and strong to endanger the reputation of those who maintain that it exists.

#### THE PROCESS

Different approaches may be applied to ensure solid and visible scientific grounds to an action plan. Some examples have been provided during the mutual learning process.

- ❖ **Case 1** presents a successful attempt made by a team to **introduce an advanced technique** – the Gender Budgeting Method – aimed at measuring gender inequality in all sectors and levels of the organisation. This method also takes into account aspects which are usually neglected or overlooked. Despite the many technical and organisational problems inevitably met in testing such a technique, its application proved extremely useful in putting the question of gender inequality in the agenda of the organisation.
- ❖ **Case 2** presents a similar initiative to analyse **gender inequality mechanisms** by applying a combination of different methods, including the collection of statistical data, the implementation of a survey and the organisation of various focus groups. The case shows how the implementation of serious analyses contributes in arousing interest in gender equality within the organisation but, at the same time, how important leadership support is in making these analyses possible.
- ❖ In **Case 3**, an example is provided of an action plan in which, from the beginning, an effort was made to account for the condition of women in the organisation through a research initiative. This initiative was also conducted with a view to embed permanently in the organisation the practice of producing a report on gender equality on a regular basis, **to make the organisation more transparent**. The example shows how this effort may be jeopardized by different factors (including the weakening of internal political support), despite the positive outputs it may produce.

Finally, in the box below, the case of the GenisLab project is briefly recalled, where a specific methodology – the Participatory Gender Audit – has been successfully applied, with the effect of raising awareness of and participation levels in gender issues in all the concerned organisations.

### PARTICIPATORY GENDER AUDIT

In Genis Lab, as a first step in all the partner organisations implementing action plans, a participatory gender audit (PGA), involving many different people at all levels, was organised, following the methodology set up by the ILO. The PGA, i.e., an action-research methodology that helps to 'map' an organisation from a gender equality perspective, combines the objective observation of facts and data with a more in-depth and qualitative reflection on individual and collective rules, behaviours, and beliefs, as well as their impact on gender equality. The involvement of leaders and stakeholders in the PGA actually led to people being mobilised around gender equality, or at least it paved the way for a smooth implementation of the actions encompassed in the gender action plans set out in the second part of the project's life.

See: <http://www.genislab-fp7.eu/index.php/guidelines>

## THE CASES

### Case 1 – TESTING NEW METHODS

**The starting point.** One of the first FP7 projects adopted the technique of gender budgeting (GB, an application of gender mainstreaming in the budgetary process), whose full implementation was achieved at the end of the project in some of the institutions involved. The main purpose of GB is specifically to contrast opaqueness in decision-making processes, which was considered to be the first problem faced by research institutions in the implementation of institutional change for gender equality. The gender budget analysis, in the case of this project, also involved the measurement of space and time availability for women and men researchers in the institutions concerned.

**The dynamics.** Data collection for gender budgeting was something new and challenging. Difficulties arose in retrieving, processing, and in some cases harmo-

nising the data collected by the different European partners, operations which took longer than foreseen, especially in cases where data were sorted according to different criteria. Some data (e.g., about the gender pay gap) were impossible to gather and analyse in the given timeframe. This made it difficult to use all the data collected to design the action plan, since some information was only available at the end of the project.

**Some results.** The provision of detailed data succeeded in overcoming the frequent objection: "This problem doesn't concern our organisation". Where gender budgeting was completed, gender inequalities in the availability of resources for women and men scientists were documented in detail, making it impossible to deny or overlook them.

### Case 2 – ANALYSING INEQUALITY MECHANISMS

**The starting point.** A first phase of intensive data collection, followed by a set of presentation and dissemination activities, was also performed by a technical university in the framework of a European project. First, a survey was implemented in the first year and comprised: 1) an analysis of sex-disaggregated statistics on human resources; and 2) quantitative and qualitative research (questionnaire survey and focus groups) on the situation of university staff in terms of needs, opportunities and barriers for the professional and career development of women and men both in research and teaching as well as

administrative positions. These reports and research findings were presented to and discussed with top management and key stakeholders. Some results (from a statistical survey) were published in the national language in a poster and on the project website, and widely disseminated.

**The dynamics.** While the collection of statistics was relatively smooth, more difficulties emerged in the survey on needs, opportunities and barriers. Concerns about anonymity and the possibility of being recognised were manifested by some interviewees, as

well as the fear that non-anonymized survey input would be provided to top management. Despite this, particularly interesting data have been collected, also because of the willingness of people (both women and men) to express their opinions about some crucial aspects of their working environment. The leaders of the faculties did not give their support to the implementation of the survey, as was expected. This was only partially compensated by the support given by the former vice-rector. In particular, the female bursar disapproved of publication, for fear that it would disclose cases in which the Labour Code was being violated, namely when exceeding the working hours. The argument was also that persons participating in the survey were people who were not important researchers or leaders of research teams and that the conclusions of the survey did not reflect reality.

Nevertheless the project coordinator later enforced the publishing of this and other reports on the national version of the intranet project websites, so the reports are accessible to the university staff. Furthermore, some resistance was noticed when the results of the

survey results were presented at the Academic Senate. According to the team, the results of the survey were not well received by some of the top leaders, especially as regards those related to overtime. Some conclusions of the report were challenged by the top management.

**Some results.** The project team highlighted a positive impact of the statistical surveys, which allowed light to be shed on the actual situation within the institution and consequently for more effective HR strategies to be developed. In the final part of the project, the team used an update of the statistics and the report to re-launch the mentoring program, which had been discontinued. It appears that the use of sex-disaggregated statistics in the institution is now widespread. The project team leader has received requests from different people to get the data (for instance from the director, who used them during an interview with the media), while the bursar asked the team to provide a financial estimate for continuing data collection in the future.

### Case 3 – THE PATH TOWARDS TRANSPARENCY ABOUT GENDER ISSUES

**The starting point.** Much of the work undertaken in the first year of the gender action plan focused on research into the situation of women in the institution. The research report made a substantial contribution to promoting gender in the institution and beyond, through the accurate description of the situation of women and men at the university as a whole and at the different schools. It provided statistical indicators that enabled comparisons to be made with other national and international studies of women in research and innovation, such as the reports regularly produced by the European Commission (She Figures), and the one produced biannually by the national government. On the occasion of the presentation, to give a clear picture of the ongoing trends, the team launched an exhibition integrated by panels in which the results of the report were shown didactically with the use of graphics. This exhibition was inaugurated in the main building of the University and then circulated in different schools. The report was written in English, so as to maintain an international level, and subsequently translated into the national language.

**The dynamics.** No particular problem emerged during data collection, thanks to the powerful effect of the endorsement of the top management and the cooperation of the statistical and administrative

offices in charge of data collection (it happened that where the people in charge felt gratified by the valorisation of their role, they worked more than requested). Positive effects were produced by the novelty of the data, showing for instance a strong and rapid increase in numbers of women students also in some technical areas. There was an increase in interest in data and graphs that clearly illustrated this kind of phenomena, which can be used for multiple purposes. A partial change of scenario, in the last part of the project emerged after the change of rector, with the election of a management team less interested in gender equality policy. The statistical data published for the new edition of the statistical report were less detailed and less attention was given to their publication.

**Some results.** Taking seriously the report, the former rector of the university decided to launch a gender action plan of the institution. The collection of the data was useful not only in convincing the rector, but also in reaching people who otherwise would not be informed about the project. Different people in the various schools started to use the collected data for different purposes. Now the methodology to produce and illustrate data is available for further editions.

## 6. Political backing - *Leaders as testimonials for gender equality*

### THE ISSUE

The involvement of leaders and managers in gender action plans is one of the most debated issues.

The key question does not concern whether **political backing** is necessary to pursue the objective of gender equality, as this would be quite obvious. Rather, attention is mainly focused on the **process of involvement** and, in particular, how to trigger it and, especially, how to make it stable over time.

In fact, most of the teams who participated in the mutual learning exercises, organised under TRIGGER, experienced the **fragility, instability and precariousness** of the political backing offered by the leaders, sometimes implying serious consequences for their action plan.

This phenomenon can be produced by **many factors**. One of the most recurrent factors is leadership turnover, which can alternatively result either in an unexpected disengagement of the management or in an equally unexpected increase in the leaders' involvement. However, other factors may contribute to this instability, such as shortage of funds, changes in the overall priorities of the organisation, changes in national regulations, modifications in the self-promotion strategies of specific leaders, tensions between the team and some managers, conflicts between organisational units or simply the unstable and inconsistent behaviours of the leaders concerned.

### THE PROCESS

In this general framework, it is not surprising that all the teams try to develop their own strategies, geared to activating and stabilising support from the leadership. In the following cases, three different situations are presented.

- ❖ **Case 1** highlights the risks connected to leadership commitment when it is **largely formal**. In this case, the situation only improved when it became necessary for the institution to make a stronger commitment to gender issues so as not to lose additional funds and to protect the public image of the organisation.
- ❖ In the **Case 2**, what clearly emerged is the need to **develop complex strategies** to involve leaders, even though this may require extra-work from the team. The keystone of such strategies was to make the commitment of leaders publicly visible, through public conferences, mass media and other means, so as to make their disengagement less likely to occur.
- ❖ **Case 3** describes an overall approach which frames the involvement of leaders as part of a broader strategy to **promote the institution's public accountability** by embedding gender equality in the current practices of the organisation. As the case shows, when leadership involvement is concerned, the relationships between effort and result is particularly uncertain, but, once the link is established, unexpected effects may arise.

In the box below, an example is provided of an advanced strategy of leadership commitment on gender issues based on the launch of an international campaign.

#### INTERNATIONAL CAMPAIGN "HE FOR SHE"

The EGERA project at Sciences Po (Paris) successfully engaged the President of the institution in the international campaign "HEforSHE", thus enhancing his involvement in the project, and, more in general, committing the institution to gender equality in a stronger manner. After the

initial decision, he was invited to be one of the university champions of impact, making Sciences Po one of 10 universities around the world committed to taking bold, game-changing action to achieve gender equality within and beyond their institutions.

See: <http://www.heforshe.org/en/impact>

<http://www.heforshe.org/->

[/media/heforshe/files/impactchampion/heforshe\\_impactprogramme\\_university.pdf](http://www.heforshe.org/-/media/heforshe/files/impactchampion/heforshe_impactprogramme_university.pdf)

## THE CASES

### Case 1 – WHEN FORMAL SUPPORT IS NOT ENOUGH

**The starting point.** In the initial phase of the project, a board encompassing deans and other university leaders was created to back the implementation of the gender action plan. Despite this arrangement, the actual support for the team was low.

**The dynamics.** The situation was initially very difficult. Not much help was provided by the leadership to manage problems and to implement actions (e.g., in overcoming the objections of the ethical committee for internal research work, or in convening early career researchers in the project initiatives). At the faculty where the project team was based, after personal conflicts, one of the main leaders resigned from the internal board.

The situation around the project started to change mid-term, when national-level pressure for gender equality in research institutions started to be strongly felt. The institutional reaction was serious, and

included a willingness to publicly communicate renewed efforts toward institutional gender equality policy. The attitude of the majority of the leadership changed and there was increased interest in project activities and instruments. Leveraging on this, the project team took advantage of the occasion to publish a series of video-interviews with institutional leaders, who accepted to share their views on gender equality in higher education, its challenges and achievements. The first to be interviewed was the Rector of the University, thus giving the idea that gender equality could not be classified as a minor issue. Some senior leaders, however, continued to show lack of interest towards the project.

**Some results.** The status of the project team has risen in the institution, and the project has been recognised as one of the internal stakeholders for equality issues.

### Case 2 – DEVELOPING COMPLEX STRATEGIES FOR LEADERS' INVOLVEMENT

**The starting point.** Working in a very well-known university for equality management, the staff of the equality office always succeeded in keeping high the visibility of the institution's commitment to gender issues, promoting several public campaigns and initiatives at national level. Their effort was enhanced by participation in a European project. Once the project started, however, a change in the leadership and other surrounding circumstances made it difficult to increase, or even just preserve, the institutional commitment to gender issues.

**The dynamics.** Team members soon realised that directly negotiating the measures they intended to implement with the president had no effect and, in some cases, was simply impossible. The attempt was therefore made, also on the advice of some pro-gender members of the president's team, to leverage public visibility to attract more substantial attention and support from the president. The importance of her presence in national and international events planned

in the framework of the European project was thus strongly emphasised, as well as her participation in public conferences, the release of interviews on the mass media, and so on. They consequently decided to intensify their endeavours on communication and visibility, actively looking for possible events and interviews to release. This entailed additional work to prepare documents, short briefings and supporting actions to make it possible for the president to be well-prepared and updated. The need emerged to be patient and flexible, not insisting too much in some cases, while trying to indirectly transmit articulated messages on gender equality at every opportunity.

**Some results.** The strategy of personally involving and committing the leadership through external visibility turned out to be effective. Team members report that they observed increased knowledge of the issues in focus, as well as progressive recognition and acceptance of "hot" issues, like the occurrence of sexual harassment in the institution. All this effort

resulted in stronger leadership ownership of the gender equality policy of the institution, with subsequent general improvement in the climate for gender equality action at all organisational levels.

### Case 3 – CONNECTING LEADERSHIP INVOLVEMENT AND PUBLIC ACCOUNTABILITY

**The starting point.** Under a gender equality project, the issue of the leaders' involvement was from the beginning understood as a part of a larger political process aimed at building the institution's public accountability on gender equality. In such a perspective, gender equality and gender awareness are perceived as fully incorporated in the everyday practices and strategies of the organization, thus involving a general mobilisation of internal stakeholders, starting from the leadership. This approach was particularly successful at one partner organisation.

**The dynamics.** The launch of the action plan was smooth, also thanks to the initial endorsement of the top levels of the organisation. Internal attention to gender equality increased on the occasion of new activities on gender in research content and the appointment of a gender equality officer. Despite a generally good situation, the pace of change was somewhat slow, and toward the end of the first year, a reduction in project visibility was observed. Team members thus decided to re-launch it, this time specifically addressing the top leadership. The

situation they tried to reverse was not so much a lack of commitment, but a sort of missing link with the institutional agenda of the institution, moving from a side-lined position to a core one. Internal negotiations were conducted to significantly involve the most important leader of the university in a public initiative addressed to corporate leaders and other prominent public personalities, geared at promoting gender equality in their organisations, making it an integral part of their strategy.

**Some results.** The public commitment of the institution generated huge visibility in the media (both newspapers and social media), with the subsequent further involvement of the top leadership in the process of progressive centralization of gender equality in the institutional strategy. Thanks to the public attention on these issues, an unprecedented mobilisation of students was observed. Their claim for deeper commitment against inequalities in all the aspects of university life represented a further push factor for change.

## 7. Creating space for engagement - *New groups and institutions for new challenges*

### THE ISSUE

Raising awareness and participation on gender issues is of paramount importance for the success of a gender action plan. However, equally important is **channelling participation** towards common objectives through a system of actions, so as to prevent the disengagement of the committed people over time.

Usually action plans match this need by **creating engagement spaces**, to be intended both in physical and social terms, allowing people to turn their passion, interest and willingness to participate into actual participation. In some cases, these spaces may become autonomous structures (networks, associations, research groups, virtual platforms, etc.) able to keep on developing after the end of the funded period.

Finding the right engagement solutions is not always simple. To bring people together and push them to work together on a voluntary basis, thus creating any kind of new group, a wide range of variables are to be taken into consideration, such as uneven levels of engagement, time availability, logistic, technical and organisational aspects, leadership dynamics, availability of resources, visibility of the new group, and the negotiation progress of a shared view of the problems to be addressed and the activities to be done.



Therefore, while the creation of a new group is often the best or the only solution for **turning participation into action**, it is also important to be aware that creating a new group and keeping it active generally requires, at least initially, a significant investment by the team in terms of energy and time.

## THE PROCESS

Three cases are presented below, each one exemplifying a specific approach.

- ❖ **Case 1** pertains to the establishment of **multidisciplinary teams** of researchers interested in being professionally engaged with gendered science. This process started with the organisation of training activities and workshops. The process then developed, even though some organisational problems were met. The case in particular highlights the important role played by the EC in providing strong political and institutional backing for the introduction of gender in research contents.
- ❖ **Case 2** concerns an ambitious attempt to create **participatory groups on gender issues at faculty level**, so as to allow those who were interested in getting involved to actually participate in action plan development. The case interestingly shows the institutional dynamics which the creation of new groups may generate (for example, conflicts between different organisational units) and the variable impacts this kind of solution may have on different targets (for example, the uneven participation level of female employees, male employees and male/female students).
- ❖ In **case 3**, another example of the establishment of a **research team on gendered science** is provided. The case confirms the importance of creating new groups for conveying participation, but it also illustrates how it is problematic, for people already intensively engaged in research, teaching, and other academic commitments, to find the time and energy necessary to actually participate in new initiatives on a regular basis.

Here below, a successful experience from one of the first EC-funded structural change projects is briefly described.

### AN INTERNAL COMMITTEE TO TAKE ACTION

Inspired by the *Strategies and Tactics for Recruiting to Improve Diversity and Excellence* (STRIDE) Committee, initially created at the University of Michigan (US) through the NSF-ADVANCE Program, the CNRS created – in the framework of INTEGER – a Committee for Gender Equality and Research Excellence. The purpose was to review the procedures and practices for the evaluation, recruitment and promotion of researchers at CNRS. It was composed of the chairs of all CNRS' standing peer-review evaluation panels, deputy scientific directors, HR senior officers, senior women researchers and gender experts. At the end of the project, an increased gender balance was observed in scientific awards, as well as in recruitment and promotions.

See: <http://www.integer-tools-for-action.eu/en/resource/lessons-learned>

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## THE CASES

### Case 1 – MULTIDISCIPLINARY TEAMS ON GENDERED RESEARCH IN STEMS

**The starting point.** In a University with a long record of activity of gender equality actions and some interesting experiences of gender in research and teaching, the EC funded project was the occasion to launch more systematically some strands of gendered research in STEM. To liaise with the researchers and professors of STEM disciplines in the two scientific areas targeted by the project, the choice was made to create multidisciplinary teams including social scientists with gender competences and researchers from different scientific areas. These teams received small grants to advance multidisciplinary research considering sex and gender aspects in various fields (e.g., autism, traffic flows, public buildings).

**The dynamics.** At the very beginning, the problem was to convince people to engage in this new approach, above all in the medical departments. The team thus spent the first few months of the project identifying at least one professor in each department who would be interested in actively participating from

the initial phases, dedicated to gender-based training through an expressly dedicated course. Some targeted actions were planned that would raise interest in the proposed project. In particular, a seminar and a national conference were held, where the importance of gender in research in Horizon 2020 was explained and discussed. These activities were quite effective, as was the training course addressing PhD students, researchers and professors, organised as an interactive workshop during which all participants had the opportunity to contribute. The ideas expressed during the interactive session were the basis for testing innovative procedures and tools. The multidisciplinary research has since then progressed and is currently ongoing.

**Some results.** The strategy adopted for gendering research contents within the European Framework proved to be highly effective and useful in the medium-term too. The team has extended its scope to other scientific areas and interested individuals.

### Case 2 – PARTICIPATORY GROUPS AT FACULTY LEVEL

**The starting point.** The launch of the European project was supported from the very beginning by the top management of the university. The process envisaged in the project entailed the creation of permanent groups in all the faculties concerned. Each group was composed of people at different career levels – from the dean to the PhD student, with the aim also of creating a stronger link between research and teaching – and was responsible for identifying the issues at stake for gender equality in their working environment. The core team was very clear about the need to convene motivated people. The work started in one faculty, which was used as a test case, and was subsequently extended to other three, thus involving four out of five university faculties.

Core team members were constantly in touch with the groups, due also to the fact that the faculties involved were all represented in the core team, and they continued to stay in touch throughout the implementation, to report on their progress. Only at one faculty, which joined later, the staff decided not to continue to cooperate with the project, not accepting to be in a somewhat collateral position. Once established, the groups set a programme of actions to be implemented in a given time frame (whose length was decided based on the complexity of the activities

and the specificity of the faculty involved). The idea was to link with some strategic issues at each faculty. In one faculty, three cycles of actions were implemented, while in another just one.

**The dynamics.** The constitution of the groups was not a problem, thanks also to strong leadership endorsement. In one faculty there were men sceptical about gender equality, one of them publicly critical. During a participatory meeting, where the discussion was open and informal, his position was analysed and, after further dialogue with the project team coordinator, his attitude changed, leading him to cooperate with further project initiatives.

One problem was the low number of men and students involved. As for men, the team tried to involve the deans (all men), and organised a panel of men during international women's day. Concerning the students, the team organised targeted focus groups to talk about gender equality, and a campaign on the social media, thus improving the situation.

**Some results.** The vertical commitment of the groups made it possible to be effective in launching and implementing new actions. The groups generated interest in senior researchers and subsequently



pressure on the university management, allowing for decisions to be made on measures to be adopted (e.g., improving the policy of maternal leaves for young researchers).

### Case 3 – A TEAM FOR PROMOTING GENDER IN RESEARCH CONTENTS

**The starting point.** In a technical university involved in an EC-funded project, the team tried to address the challenge of inserting sex and gender aspects in research methodologies and contents through different actions. The first step was to create an internal team made up of one assistant professor and one research fellow, i.e., two researchers interested in the issue. The core team saw that these researchers were in a better position to have access to students and colleagues, as well as specific resources. They received training and started to collect recent literature on gender in research in their scientific fields and sub-fields, with the idea of becoming focal points for these subjects both in the framework of the project and more in general within their departments, which they actually did. Being involved in teaching, they have been able to transmit their approach to students and to orient their research work, which is bound to last from the undergraduate course up to the PhD and longer, and to keep them liaised throughout the project activities and after they end.

**The dynamics.** Albeit interest towards the issues dealt with was never questioned, the persons in charge of gender in research, especially in some periods of the year, are overloaded with work, being involved with teaching, supervising students' theses, and other academic commitments. Furthermore, less interest, resulting in weaker support than expected, was manifested by other women professors in involving their students, so that the team often has to address the students directly. The mutual exchange with the project's core team was helpful for rearranging actions and making them more in line with the target interests (e.g., creating a research contest).

**Some results.** The group succeeded in starting and implementing innovative activities on gender in research, thanks to the resources provided by the European project and the interest aroused in the top management by some of the new methodologies adopted to raise the interest of students.

## 8. Mobilisation of pro-women actors -

*Involving groups and structures already concerned with gender*

### THE ISSUE

For a team in charge of an action plan, in addition to the mobilisation and activation of new actors on gender equality, another issue which is equally important is the mobilisation and activation of **existing actors**, i.e., the actors who are already engaged in gender equality in science.

This aspect undoubtedly concerns the existing actors **within the organisation**, such as equality officers or committees, women's associations or networks.

In some cases, **pro-women actors who are external to the organisation** are usefully involved. These connections may help the team in different ways: linking the action plan with a larger public arena, as well as broader scientific and information circuits; increasing the external visibility of the action plan, which also has internal effects; attaining external resources, knowledge and information; learning from other expert actors; finding additional institutional support; involving external experts in the action plan; promoting long-term sustainability.

## THE PROCESS

Strategies for involving internal or external actors that are already committed to gender equality may vary according to the type of actor and the nature of the cooperation established with them. Opportunities, risks and obstacles tend to vary accordingly.

- ❖ In **Case 1**, a connection was established between the team and a **new-born institutional entity**, i.e., a national conference of the units in charge of equality issues within public universities: the intention was to establish a specific section on gendered science within the new body. A process was set in motion in this direction, even if slower than expected, due also to resistance on the issue from some members of the conference.
- ❖ **Case 2** reports a strategy pursued by a gender equality team in a university to create a national network of gender equality bodies in higher education institutions well before applying for and implementing a funded project. While representing a certain effort for the project team, once the project started, this turned out to be an advantageous investment for the success of its action plan.

Finally, in the box below, a successful example is provided of the fruitful interaction established by a team with many national and international organisations and networks addressing gender equality and women studies.

### NATIONAL AND INTERNATIONAL NETWORK OF WOMEN IN SCIENCE AND UNIVERSITY

The TRIGGER partner UPM implemented the first gender action plan in a technical university in Spain. To enhance its efforts within the institution, the team carries out intensive networking activities on gender-related issues, both at national and international level, including participation within Plataforma Universitaria de Estudios Feministas y de Género (University Platform of Feminist and Gender Studies), Global Network of UNESCO Chairs on Gender, AMIT Asociación Mujeres Investigadoras y Tecnólogas (the Spanish Association of Women Researchers), Red RUIGEU (the network of all the equality units of Spanish universities); Grupo de Trabajo GENDER4UP (a working group within Asociación UP4, including the four technical universities in Spain), Asociación de Mujeres Arquitectas de España (Association of Women Architects of Spain) (in process of being set up), Fundación Mujeres X África (Women for Africa Foundation), EWORA – European Women Rectors Association, and finally a network uniting the Spanish projects addressing gender in science funded by the European Commission, which was created by the Spanish Secretary of State for Research.

See: [www.idi.mineco.gob.es/stfls/MICINN/.../TRIGGER\\_UPM.pdf](http://www.idi.mineco.gob.es/stfls/MICINN/.../TRIGGER_UPM.pdf)

## THE CASES

### Case 1 – AN INSTITUTIONAL NETWORK ON EQUALITY IN SCIENCE

**The starting point.** The project's original plan aimed to support the institutionalization of a national association of women scientists, which would act as a lobby promoting gender equality in science and gender studies at the Ministry of Education, University and Research. A National Conference of Equality Bodies of National Universities was created in the year

leading up to the project – thanks to the networking activities carried out at national level by one of the universities involved. The project team thus decided to support the new association and to establish an internal section dedicated to promoting a gender-aware research approach.

**The dynamics.** During the first year of the project, networking activities within the National Conference allowed the team to actively involve its members and to have them participate in a training session on gendered science held during the project's first year. Four seats were offered to conference members, of which they made full use. Despite this, some doubts arose among the constituency of the conference about the advisability of creating a dedicated section to gender in research, since some members of the board were not in favour of increasing institutional complexity. The project team leader insisted – in plenary meetings and individual conversations – on the advantages that the approach could yield in terms of visibility and authoritativeness. Six months later, the first thematic section was institutionalised during

the annual General Assembly of the conference. After this, the project team supported the conference in launching communication activities and a membership campaign. The response has been slow, since the activity of the conference is on a voluntary basis and its board is often overwhelmed with other professional and institutional commitments.

**Some results.** Two initiatives on gender in research organised by the Conference of Equality Bodies were held in the following two years and there has been interest beyond the members at national level (e.g., in the National health institute and in the regional authority of the region where the project is located). The visibility of the project in the university, as well as at local and national level, has thus increased.

## Case 2 – EXTENDING THE IMPACT OF THE GENDER EQUALITY PLAN THROUGH NATIONAL NETWORKS

**The starting point.** In the years preceding the beginning of the project, one of the partners in an FP7-funded project promoted a national coordinating association of university gender equality officers, to share experiences and support common actions at national level. Being one of the main promoters, the initial commitment of the project team members was strong, especially in drafting the statute of the new association.

**The dynamics.** The cooperation with the national association developed throughout the implementation of the gender equality plan, thanks also to the constant commitment of the team, with benefits for both the GEP and the association. In particular, many gender equality officers nationwide have had the opportunity to know about and use the statistical data collected under the action plan, through a meeting organised by the association where they were presented. In turn,

the team was supported by the association in organising an international conference as well as in lobbying for gender equality measures (e.g., against sexual harassment) with the Ministry of Higher Education, which now officially recognises the association as an interlocutor on gender equality issues. The project team members have also been invited to join some working groups at national level as representatives of both their institution and the association of equality officers.

**Some results.** Thanks to this partnership, some of the actions included in the GEP are also reported to have been replicated in other institutions. Moreover, the collaboration with the gender equality officers and their association allowed the team to count on additional connections and to increase their authoritativeness. All that turned out to be useful to implement the GEP.

## 9. Active involvement of men

### *Bringing men into the core of institutional change*

#### THE ISSUE

There is a sort of implicit and widespread assumption that gender equality is mainly a women's affair. Maintaining this position is not only "politically incorrect" but it's also theoretically and practically wrong.

Despite that, when an action plan is conceived and developed, **men tend**, quite systematically, **to remain out of the picture**, unless they perform a leadership role, so that their overall disengagement is almost taken for granted (if not silently justified) by both women and men.

This is particularly dangerous for **different reasons**.

In the first place, without the meaningful involvement of men, institutional change is much more difficult to attain and much slower. Targeting women as the main beneficiaries of the gender action plan and the main actors to mobilise is a dangerous choice. Women – and particularly women scientists – do not usually like to get involved in women-only initiatives, which can stigmatize women. On the other hand, women-only initiatives may fuel further men's disengagement or even men's hostile reactions towards the gender action plan. Finally, not connecting gender issues with the strategic challenges of the organisation as a whole, including both men and women, inevitably leads to the marginalisation of gender inequality in the policy agenda of the organisation.

#### THE PROCESS

Mobilising men is thus necessary but, in the context described above, the objective can be difficult to fully achieve. Different strategies have been developed to address the participation gap of male employees and researchers in gender action plans. Some examples are given in the cases presented below.

- ❖ In **Case 1**, the main strategy involved **planning from the beginning** a balanced participation of women and men in the different initiatives of the project on gender equality. In this perspective, even though the team was initially made up of women, a big effort was made to enlarge team composition. Results have been promising, but in some cases the attempt to encourage the participation of men led to a slow down of planned activities or additional problems in their implementation.
- ❖ **Case 2** shows another strategy, aimed at ensuring **gender balance in any public initiative conducted under the action plan**, so as to also allow for the possible critical positions of men to emerge in the public debate. This objective was achieved in the case of a discussion launched under the action plan on gendered science, leading to an increase in the visibility of this issue within the organisation.
- ❖ In **Case 3**, the approach was to develop initiatives of general interest that were open to both females and males but **designed from a gender perspective**. The underlying logic was not to exclude men but to exclude the male-dominated culture on which these initiatives are usually based.

The box below briefly presents another important strategy to get men involved, i.e., that of making them testimonials of gender equality and putting them at the forefront of the debate of gender equality as gender experts.

## MEN TESTIMONIALS AND GENDER EQUALITY EXPERTS

At the Prague Institute of Chemical Technology (VSCHT), a strongly male-dominated institution in top positions, a constant effort to invite men testimonials to discuss institutional challenges related to gender equality was made by the team of the TRIGGER project. Among others, Curt Rice, Rector of the Oslo and Akershus University College (NO), Manfred Horvath, Honorary Professor of the Vienna University of Technology (AU), and Gary Loke, Deputy Chief Executive and Head of Policy and External Relations for Equality Challenge Unit (UK) were invited. The participation of men researchers and middle managers was active and the initiatives successful.

See:

[http://triggerproject.eu/wp-content/uploads/2014/05/Newsletter-3\\_def.pdf](http://triggerproject.eu/wp-content/uploads/2014/05/Newsletter-3_def.pdf)

[http://triggerproject.eu/wp-content/uploads/2014/05/Newsletter-4\\_def.pdf](http://triggerproject.eu/wp-content/uploads/2014/05/Newsletter-4_def.pdf)

[http://triggerproject.eu/wp-content/uploads/2017/02/Newsletter-5\\_def.pdf](http://triggerproject.eu/wp-content/uploads/2017/02/Newsletter-5_def.pdf)

## THE CASES

## Case 1 INVOLVEMENT OF MEN PLANNED FROM THE BEGINNING

**The starting point.** In one of the first FP7-funded projects, the involvement of men was planned from the very beginning. In most of the project teams there weren't any men, but cooperation with some important men in the organisation was constant (e.g., heads of department). Another key point was to involve very important men, who felt recognised being informed and/or consulted about the progress of activities, and anchor the project to them, even if they were not directly involved.

**The dynamics.** As expected, things worked better with influential men who were already pro-gender. Concerning other men, efforts were made to make them aware of inequalities – something they rarely perceive – and the fact that it is a negative situation for the institution. Information seldom met resistance. However, sometimes it was more difficult to involve men who should directly participate in the activities, such as heads of department. At the beginning of the implementation process, cooperation with the heads of department was generally good, even though men's

attitudes and participation levels varied. At two departments, the heads were informed and engaged together, and as one of the heads was very pro-gender, the head who was more negative found it more difficult to oppose in isolation. However, relying on these two male heads ran into a problem after the elections, when one of the heads of department changed. The new male department head was not inclined at all to continue project activities, and as there was no obligation to follow the previous decision of the former head, his department discontinued their involvement in the project. What was lacking was the anchoring of the project activities in formal structures, making them less dependent on individual men.

**Some results.** The equality activities went on in the departments where pro-gender equality men were involved, succeeding in revitalising gender equality work, which is mandated by the institution but not always active. In other cases, the activities were slowed down or interrupted after the end of the project.

## Case 2 – WELCOMING MEN'S CRITICAL POSITIONS

**The starting point.** During the operational planning of an action plan, the team was very careful to make sure that a woman and a man were always coordinating public initiatives together. This entailed trying to find specialists of both sexes, in the scientific areas involved, to act as panellists and trainers for researchers and professors. The idea was to foster reflection on the gendered aspects of the professional and scientific practices of women and men, including

young researchers both sexes, to avoid ghettoising these issues or labelling them as women-only subjects.

**The dynamics.** In one of the two departments concerned, a very competitive STEM department in the international dimension, the selected experts were completely external to the university and foreigners, so as to show how these issues are addressed in an international perspective.

In the other one, where social sciences were involved and there had previously been some tension, an intermediate solution was found. A former professor of the university was invited, currently working in another national university, thus able to speak about gender and careers with his peers sharing with them a common background.

To facilitate participation, it was decided to organise these meetings following a "one-shot" format, hoping to maximise the number of attendees. The attempt to reach the public was successful in terms of the variety of different research groups represented. The team

succeeded in convening also critical colleagues, mainly men, who freely expressed their positions.

**Some results.** Even though it was impossible to convince radical opponents, the team was still happy to launch a debate on issues that generally are neglected and remain unnoticed, like the existence of a gender bias in the process of selection. Among others, this allowed generally indifferent people to recognize the existence of issues, even problematic ones, around the alleged gender neutrality of scientific and professional practices in academe.

### Case 3 – EXCLUDING A MALE-DOMINATED CULTURE RATHER THAN EXCLUDING MEN

**The starting point.** In an action plan under a FP7 project, two training courses were planned for the STEM departments with the aim of empowering young women researchers to increase their funding application levels and their published articles. The project team designed these initiatives on the basis of the obstacles met by women researchers in publishing and in accessing research funds and managing research projects.

**The dynamics.** To overcome opposition to women-only initiatives expressed by the office responsible for researcher training and the lack of interest towards gender trainings among young researchers, it was decided to insert a gender-aware perspective in the

design of an initiative that fitted the actual needs of the target group. What was done in this case was to reverse the current practice, based on the idea that women have to adapt to programmes and services designed according to a "neutral" (i.e., male) perspective. In this case, the training needs were similar for researchers of both sexes, mainly young, so the concerned skills were very valuable for all the participants. Men were admitted only if attending the whole course (including the introductory modules on gender equality).

**Some results.** Attendance levels and participant satisfaction, for both women and men, were very high. The course has been planned for the next few years.

## 10. Implementation backing -

*Support from middle managers and senior researchers*

### THE ISSUE

Institutional change cannot happen at any institution without the support of either middle managers or senior researchers (heads of department, principal investigators, research group leaders, etc.).

Top managers are undoubtedly able to endow an action plan with political backing, but middle managers and senior researchers may ensure that "things go smoothly" for the action plan. For example, ensure that decisions taken are actually implemented, that legal and administrative obstacles can be removed, that the scientific quality and contents of the activities can be guaranteed, or the logistical and organizational aspects of the action plan can be appropriately addressed.

We can refer to such a role as "**implementation backing**", i.e., facilitating the implementation of the action plan from all the many relevant perspectives (scientific, organizational, logistical, legal, administrative, and the like). An action plan lacking this kind of support would be particularly exposed to the risk of failure or slow progress, since a significant part of the energy of the team would be necessarily devoted to managing these aspects alone.



Implementation backing is also necessary in that it creates the conditions for actually embedding gender equality at the heart of the organisation. Indeed, middle managers and senior researchers are **at the crossroads of any strategy and policy** of the organisation, and overall they are in **direct contact with all the researchers and employees**. Capturing their interest and motivations and getting their active support is therefore an unavoidable step for the action plan to permeate and be active in all sectors of the organisation.

## THE PROCESS

The experiences emerging from the mutual learning highlighted how the involvement of middle managers and senior researchers is indeed crucial, but sometimes difficult to gain.

- ❖ **Case 1** shows how **research leaders**, especially in STEM, can be deeply **sceptical about the possibility of addressing gender inequality**, in some cases on the basis of stereotypical arguments. In this case, they generally tend to emphasise the wider societal and cultural roots of the problem (thus placing it outside their institution, so that scientists cannot do anything about that), or to see any support to women as detrimental to the principle of meritocracy, which is supposed to underpin the scientific enterprise.
- ❖ **Case 2**, in turn, highlights the presence of various organisational and practical problems, despite the **support of some top and middle managers, limiting the involvement of senior researchers**, including work overload, potentially conflicting relations between senior researchers and their team members, and little scientific recognition of the team in charge of the action plan.
- ❖ **Case 3**, finally, shows the importance of **adopting well-tested participatory approaches** in order to favour the involvement of managers and research leaders, so as to create a sense of ownership about the action plan. In this case, too, many practical and organisational factors (especially lack of time and difficulties in coordinating busy agendas) hindered a greater participation of middle managers and senior researchers.

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## THE CASES

### Case 1 – STEREOTYPES AND SCEPTICISM IN SUPPORTING WOMEN’S CAREERS

**The starting point.** At one of the universities concerned, with a long tradition of gender equality actions and gender studies, the gender action plan had a strong focus on making the approach of gender-aware science an ordinary feature at the targeted STEM departments. More traditional equality-oriented actions were of course also addressed, with the aim of boosting numbers of women at senior and decision-making levels. To this end, an articulated set of actions has been devised, and the active participation and support of authoritative scientists, both women and men, has been secured to test innovative research procedures, fully integrating the gender perspective. A board encompassing all the heads of the concerned departments has been created to follow the implementation of the actions.

**The dynamics.** Also thanks to the long experience of gender equality of the project team, a general endorsement was given by the heads of the STEM involved departments to gender-aware research, and stronger support was provided by some interested senior professors, while a clearly less interest and engagement have been shown on work-life balance and women’s career. For this reason, while the research tests in STEM disciplines, coinciding with the research interests of the professors involved, were started – and some were also concluded – before the end of the project, resulting in success, more problems were encountered in activating the actions related to women’s careers and women’s access to top positions. Above all, it turned out to be difficult to convene STEM heads of departments to discuss gendered aspects of scientific careers. Once asked about their points of view about the results of research on women’s careers

within the university, the majority of the people convened declared they were sceptical about the possibility of taking action on disparities which are deeply rooted in culture and social structure, thus not directly pertaining to the working environment. Besides this, the most common objection about dealing with gender inequalities was that it would question meritocracy.

**Some results.** Difficulties in involving senior researchers and research leaders to adopt measures to support women careers were met for a large part of the project duration. Nevertheless, some positive

evolution is likely in the final phase of the project. Different factors will probably impact the situation, perhaps allowing for gender inequality issues to be more openly addressed, mostly in STEM. The other things which entered into play included implementation progress, which increasingly made gender inequality visible, as well as achievements at local and national level, and the election of a new, pro-equality rector, surrounded by a new generation of heads of department and other research managers (e.g., heads of doctoral schools), mainly younger and open-minded compared to former ones.

## Case 2 – FACTORS HINDERING THE INVOLVEMENT OF SENIOR RESEARCHERS

**The starting point.** Also in this case, as the gender equality office was created several years before the beginning of the European project, knowledge of the university and its main actors allowed for smooth implementation of the majority of the numerous actions encompassed in the rich and complex gender action plan. Institutional support was given to the project well before the start. A committee composed of the top leader of the university, the human resources director, the general services director, the head of the two departments targeted by the project, as well as the two referents for gender equality in the same departments, was created to advise and follow the gender action plan.

**The dynamics.** Despite the generally favourable context, some difficulties arose in directly targeting professors, who were supposed to be involved in specific workshops and initiatives on gender equality. Some concurrent aspects emerged, hindering the relationship with the scientific personnel of the university. One is their work overload, which increases with career level. The second is the lack of a training culture for scientific personnel, which in some cases resulted in the open opposition of some middle

managers to the team's proposals. Finally, the position of the team within the university services and not in the research departments makes it more difficult to directly address professors and researchers.

On the other hand, the project team did benefit from the commitment of some pro-equality individuals, like the heads of department, who in several cases supported the implementation of the actions (e.g., facilitating the team's access to some laboratories to conduct interviews and direct observation, suggesting possible ways to reorganise a study based on statistical data difficult to retrieve).

**Some results.** Several actions addressed to students, administrative personnel and early career researchers were easily implemented. Other successful actions were added during operation, following the advice of the stakeholders involved. For example, thanks to good relations with the university communications office, a contest on gender equality for undergraduate students was organised. The team is studying other ways to involve women professors, e.g., more informal meetings like cocktails, having less impact on the working time and offering "light" occasions for networking.

## Case 3 – PARTICIPATORY METHODS TO INVOLVE MANAGERS AND RESEARCH LEADERS

**The starting point.** At one partner institution in the framework of an EC-funded project, training courses for leaders (a combination of managers, research leaders at two research institutes) were organised, and the same leaders were actively involved in interpreting fluctuations in the number of women academics in their own departments/faculties/institutes. The discussion following the presentation of the data was led by the project team applying participatory methods for analysing data with a group of stakeholders, widely adopted and taught in the institution. The method allows a "situation" model to be built in the form of a causal loop diagram. The dynamic patterns, the relations between crucial

factors in this issue are pictured while analysing and discussing. It results in increased insights in gender inequality processes and possible new strategies to address them. The project teams functioned as facilitator, supporting the group to build the model, based upon sharing knowledge with participants. In this case, it was used to model the causes and consequences of the small proportion of women in higher academic ranks.

**The dynamics.** Even though interest was expressed in preparatory meetings, the team had to convince the research leaders to invest time in the labour intensive training sessions focusing on gender equality issues at



both the involved research institutes. It was especially complicated to coordinate the many busy agendas of the persons involved. Nevertheless, in both institutes about twelve leaders participated.

**Some results.** This procedure made it possible for the leaders who attended to participate in drawing a model of the situation at their own unit, supporting their sense of ownership and responsibility over both the analysis and the needed policies, tailored to their specific situations. In one of the research institutes participating in the project, a new gender action plan was designed and launched as a consequence of the

new awareness of women's underrepresentation at senior levels. In the other research institute, gender equality became an institutionalized research subject. New editions of the training for leaders have been planned also after the end of the project as part of the institution's leadership training programme. After one of those was cancelled for lack of participants, the university decided to make the training available for a larger group of employees. On another occasion, participants asked to extend gender equality to the broader fields of diversity, which will be implemented in the next training sessions.

## Activation and mobilisation

### *Key issues*

In this section, some crucial questions for the success of an action plan have been discussed, i.e., how to activate and mobilise key actors, stakeholders and individuals on gender equality issues and how to make their involvement in the gender equality actions possible in practice.

**Six main strands** emerged from the mutual learning process, i.e.:

- ❖ **Scientific recognition** (gender inequality gaining recognition as a scientifically proven phenomenon and the action plan as a methodologically sound approach to address it)
- ❖ **Political backing** (action plan getting support from top leaders and managers)
- ❖ **Creating space for engagement** (action plan creating new groups, networks and arrangements making participation actually possible)
- ❖ **Mobilisation of pro-women actors** (action plan gaining the support of internal and external actors already engaged in gender equality in science)
- ❖ **Active involvement of men** (action plan gaining the support of the male component of the organisation)
- ❖ **Implementation backing** (action plan getting the support of middle managers and senior researchers).

These strands clearly do not complete the picture of how to activate the relevant actors and how to get them to cooperate in the implementation of the action plan. However, they make it possible to identify some key issues which should be taken into account when a gender action plan is to be designed or implemented, briefly recalled here below.

**Attend to the interpretive and symbolic aspects of the action plan.** Two factors, among others, seem to play an important role in pushing people into or hindering people from getting involved in a gender action plan:

if they agree with the interpretation of gender inequality (its actual existence, its extent, its seriousness, its impact, etc.) underpinning the action plan and if they perceive the action plan as something important for the organisation, for the employees and for themselves. Thus, to a large extent, the success of an action plan in activating participatory processes depends, on the one hand, on the accuracy, scientific validity and reliability of the interpretation it presents about gender inequality in the organisation and, on the other, on the capacity of the team to symbolically present the equality effort as strategically connected to the main goals of the organisation and its many stakeholders. Hence the need for the team to avoid it being labelled the expression of old-fashioned feminist claims, for example, or an ideologically-oriented attempt promoted by a lobby to get more power, just another bureaucratic burden for researchers, a marginal aspect of organisational life or, lastly, something which simply has nothing to do with one's own personal or professional life.

#### **Promote targeted mobilisation strategies.**

As trivial as it may seem, it is important to reiterate that mobilisation strategies should be specifically tailored to the features of the addressed groups (leaders, researchers, administrative personnel, etc.). Most of the problems met by the teams are indeed related to the difficulty of "moving the right levers" to mobilise actors. It is therefore important to understand, for each relevant group, which are their interests, expectations, and views about gender equality, what organisational

challenges are they most willing to address, and to what extent and under which conditions would they be interested in investing their time, resources and capacities in the action plan. This is why the adoption of highly participatory approaches, allowing different mobilisation strategies and tools to be tested, is strongly recommended from the start of the project.

**Find external support to increase internal visibility and authoritativeness.** Many teams reported that they succeeded in becoming more visible within an institution by becoming more visible outside it. This result was achieved by participating in national committees, for example, or accessing national or international networks, establishing connections with pro-women associations or creating forms of cooperation with other universities and research institutions engaged in gender equality action plans. The importance of these kinds of relations is sometimes overlooked. External relations in fact may provide an action plan with important opportunities, such as getting extra-resources, involving international experts in the action plan, creating new linkages between the organisation and policy makers or increasing the reputation of the organisation in the national context. Accessing these opportunities may in turn have an impact within the organisation, such as increasing the reputation of the team among the leaders, raising the interest of researchers and employees on gender equality issues or making the action plan a tool for the organisation to develop its overall public relations and external cooperation policies.

**Create autonomous mobilisation agents.** There is the tendency in many teams to promote or establish new actors (e.g., researchers' networks, research teams, working groups, committees, etc.). This choice often proves to be particularly

effective, provided that these actors can act autonomously from the team in a reasonable lapse of time. The establishment of new actors is in fact important, not only to bring in people who are interested in being engaged in gender equality, or to multiply the effects of the action plan. In the long run, they can become new internal transformational agents, able to perform different roles (e.g., promoting new actions, functioning as a "watchdog" of established actions, functioning as the institutional counterpart of the management of the organisation) once the original action plan is completed. However, it should be highlighted that creating a new autonomous actor is not always simple, and problems are frequently met, as concerns the competencies and the energy which are necessary to act autonomously.

**Balance the fragility of voluntary engagement.** Engagement is a process, the intensity of which may be extremely variable over time. A person or a group may be intensively engaged for a period of time and almost totally disengaged in the next. The same can happen with leaders, whose support for the action plan is often provided occasionally or even sporadically. Hence the need for a team to balance the fragility of the engagement process by adopting appropriate measures such as: refraining from involving the same group of action plan "friends" too often (so as to prevent burnout and saturation); developing a step-by-step mobilisation approach, to better address sudden and unexpected participation gaps; planning different levels of participation in the action plan in order to help each one to find the most appropriate; expanding throughout the action plan the pool of actors, stakeholders and leaders potentially interested in getting involved in order to ensure, so to speak, a turnover in the people supporting the action plan.

## AREA 3 – Making an impact

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The third component of the process of change refers to the capacity of gender equality action plans to make an impact on the organisation.

"Impact-making" and "implementation" are not to be confused, as implementing an action and producing an impact are not the same thing. While it is true that implementing actions is necessary to impact the organisation, the reverse is not always true. Implementing actions does not necessarily lead to modifying existing institutional arrangements, making them more gender-sensitive and less male-dominated. Indeed, too many variables may interfere between an action and its expected impact.

A more effective way to deal with the relation between actions and impacts could be a bit more **probabilistic**, acknowledging that the more a **set of actions** are well conceived and implemented, the more **some impacts** (even if maybe not all the expected ones) **are likely** to occur.

This section, indeed, is not aimed at indicating how to implement an action plan, but at **identifying some of the recurrent factors that come into play** in making an impact more likely to occur through the implementation of a set of gender-equality measures.

Probably, the factors and processes to be considered should be many more than those addressed in this section. Leveraging upon the experience of the TRIGGER partners and the sister projects, we will limit ourselves to six of them:

- ❖ Self-reflexive processes
- ❖ Gender-sensitive communication
- ❖ Gender-sensitive education
- ❖ Action Plan tailoring process
- ❖ Policy integration
- ❖ External backing.

## 11. Self-reflexive process

*Reflexive praxes in the teams and in the management of research institutions*

### THE ISSUE

The first strand of this component concerns **"self-reflexive" processes**.

This term has been increasingly used in the last decades to refer to the need for individuals and institutions to adopt mechanisms and procedures which allow them to be more **aware of themselves**, e.g. by constantly analysing their actions, their aims, the possible intended and unintended impacts they may produce, the risks they may be exposed to, the actors who are involved in their activities, and so forth.

As experience in the implementation of many gender action plans suggests, **impact-making processes are facilitated by self-reflexivity mechanisms** allowing research organisations, among other things, to:

- Evaluate measures and norms introduced in terms of their potential impact on gender relations
- Keep a check on the number of women in the organisation at any level, quickly detecting factors which may distort or delay women's careers and their scientific recognition
- Identify and seize existing internal and external opportunities to consolidate gender-related strategies
- Anticipate the impacts of new national or European research policies on women scientists.

Embedding mechanisms of this kind in research organisations is likely to increase the impact of action plans and even to trigger long-term processes of change.

What is true for the organisation **is also true for the team**. Adopting self-reflexive procedures is in fact equally important to understand which are the actual dynamics triggered by an action plan and to keep a check on its effects, thus heightening the possibility of having an impact in the organisation.

### THE PROCESS

Teams use a wide range of **different tools and techniques** (survey, administrative data collection, qualitative methods, application of batteries of indicators, monitoring schemes, awareness raising initiatives for unveiling stereotypes, etc.) aimed at increasing self-reflexive attitudes on gender, so as to endow the organisation with, so to speak, new permanent sensors for detecting inequality. However, self-reflexivity processes may face obstacles of a different nature.

- ❖ **Case 1**, for example, focuses on the development of **qualitative indicators for measuring gender equality**, integrating existing statistics with data collected through a survey carried out under an EC-funded project. The approach was extremely effective, but it also required significant investment and expertise, which were difficult to cover with ordinary institution funds.
- ❖ **Case 2** shows the experimentation of a **technique to help people become aware of stereotypes** in both gender and science. The technique attained the expected results, even though expected resistance and unexpected problems related to privacy protection also emerged.
- ❖ **Case 3** shows a success story, in which the **production of new knowledge** through an employee satisfaction survey led the management of the organisation to reintroduce measures to improve work-life balance, which had been previously discontinued.

In the box below, a quite innovative approach to the evaluation of the action plans has been developed and applied in order to help teams activate self-reflexive processes.

## EVALUATION AS GUIDED SELF-REFLECTION

In the GENOVATE project, accompanying the implementation of gender equality action plans (GEAPs) in six European universities, a seventh partner institution – the Complutense University of Madrid (UCM), Spain – provided training and support to the others for their GEAP evaluation process. This was conceived as a part of the very process of change, being based on a collaborative evaluation model designed to facilitate organizational learning through the use of participatory, empowerment, learning and building tools.

See:

[http://www.genovate.eu/media/genovate/docs/GENOVATE\\_Guidelines\\_for\\_evaluating\\_GEAPs\\_23.11.16.pdf](http://www.genovate.eu/media/genovate/docs/GENOVATE_Guidelines_for_evaluating_GEAPs_23.11.16.pdf)

## THE CASES

## Case 1 – QUALITATIVE INDICATORS FOR MEASURING GENDER EQUALITY

**The starting point.** In the framework of an FP7-funded project, one of the tasks encompassed the elaboration of a new set of indicators, resulting in a gender equality index, based on the EIGE model, but tailored to the experiences and features of European universities. In one of the universities involved, this involved ad hoc data collection, carried out not only by processing statistic figures, but also through a survey addressed to around 1,000 people. The index includes seven different dimensions, i.e., work (participation and quality of work – e.g., type and duration of contracts), money (gender pay gap and access to funds), time (time for work and care activities), knowledge (products of research), space (space for work and work-life balance), health (well-being at work and violence), power (presence of vertical segregation, presence in academic bodies).

**The dynamics.** The development of this new approach, as well as the elaboration and implementation of the survey, required the cooperation of specialists in different scientific areas. Besides experts in quantitative methods (e.g., statisticians, engineers), psychologists and other social

scientists were also involved. This created some interesting problems of language and reciprocal understanding. In particular, when different disciplines are involved in research, it is not very easy to give a definition of concepts that can be shared among all. Another difficulty was related to the transitory nature of the European project. While it was crucial in fostering the decision to implement a survey and to finalise the indicators and the summary index, creating a general expectation towards the results, on the other hand it was an occasion which will be difficult to repeat to hire personnel for some of the scientific areas where no sufficient expertise was available. One of the current problems is thus how to guarantee all the needed competences, once the project ends.

**Some results.** The project and the survey took place during a change of central management team. The new management team was immediately aware of the extent of gender inequalities at the University, thus recognising the need to take action, on the one hand, and to continue to monitor the situation, on the other, through the elaboration of Gender Budgeting.

## Case 2 – TECHNIQUES FOR DETECTING GENDER STEREOTYPES

**The starting point.** Initial activities involving analysis and deconstruction of gender stereotypes in science at each partner institution was envisaged under an institutional change project. The idea arose from some papers written by gender experts and project consultants about the nature of resistance and the existence of very profound elements which cause it. It also highlighted that there is a clash between science

stereotypes and gender stereotypes, which add to each other and interact in variable ways. The exercise was conducted through the ReAct Theatre technique. The participants were asked to reproduce some typical situations in their organisations and then to stop and think about them. This is to understand how these situations can reveal the existence of stereotypes, what forms they take, and how it is possible to contrast

stereotype-based modes of action. The technique requires the presence of external actors, to lead the performance, and previous preparation with the internal teams.

**The dynamics.** The technique was experimented first by the project teams during a consortium meeting. The transnational group, consisting of about twenty people, was divided into subgroups, each committed to identifying and staging a typical discriminatory situation. The rest of the group then interacted and provided interpretations, trying also to suggest ways of behaviour that could have led to a different development. Out of 5 sub-groups, 3 decided to perform a situation where decisions were taken informally in situations where women were excluded. The scenario involved women coming to a meeting where the decisions had already been made. It was thus necessary to understand what would have to be done before, e.g.: to get rid of informality. This proved that the feeling of isolation was not a situation in a single organisation, but common to several organisations. Subsequently, each partner organisation

implementing a gender equality plan organised a session at its premises. Only one of the partners decided not to implement it. Where the sessions were held, different situations were depicted, which pointed to a variety of discriminatory situations. Some resistance to actually taking part in the performance emerged from some of the participants, often because of confidentiality concerns regarding the situations represented. In one case, a short movie was planned, but in the end the participants decided not to do it.

**Some results.** Participation was good (better than a seminar on the same issues would have been) and the technique used effective. Indeed, it made it possible to transmit messages at a deeper level, as evidenced by the fact that real and different situations, based on the context in which they actually happened, came out. Actions were proposed to address the dynamics that emerged. It is difficult to say if and how individual behaviours changed, in the absence of a follow up in each of the organisations involved.

### Case 3 – ASSESSING THE IMPACT OF WRONG POLICIES

**The starting point.** At one of the universities involved in a structural change project, services and measures supporting work-life balance were reduced or even eliminated, due to economic restrictions, in the years immediately before the project was launched. The project included, in its first period, a satisfaction survey regarding the existing services and the work-life arrangements for women researchers. Starting from the end of the first project year, the team also began to analyse the university's internal regulations on research fellowships, researchers working on a temporary basis, research scholarships, the working conditions of PhD students and freelancers hired by the university.

**The dynamics.** The survey made it possible to gauge the impact of university decisions on the lives of its employees, demonstrating a great imbalance between women and men researchers in family care and showing how women were badly affected, in their careers, by their care burden.

In the same period, an analysis of administrative documents highlighted significant discrepancies between the internal regulations concerning temporary

researchers and the university's general rules, thus leading to uneven treatment.

The team's decision was to give broad publicity to the research reports, affecting different audiences in the university, and to open discussions with the top management about the results of the analysis of the administrative documents.

**Some results.** The rector, even if not particularly committed to gender equality, decided – after the presentation of the research results – to restore the benefits which had been cut. Thanks to the survey, at the start of the second project year the administration signed a number of agreements with various co-operatives to satisfy the need for childcare services of university employees, students and PhD students and others working for the university on a temporary basis.

In the same period, some amendments to the internal regulations were put forward to the Academic Senate, aiming at offering the same treatment to permanent and temporary staff. Once the Academic Senate expressed its approval, the Board of Directors adopted the amendments proposed.



## 12. Gender-sensitive communication

*The relevance of language for administrative leaders and staff*

### THE ISSUE

Trying to produce an impact on the organisation without acting on communication is like trying to hold back the tide with a broom: practically impossible. This is because gender-biased communication can restore and reproduce overnight, so to speak, the inequality patterns we are trying to dismantle during the day.

**Changing communication contents, styles, languages and images** is, however, a long process. In particular, changing the way people communicate in the working environment is difficult and takes time. More realistically, an action plan could aspire to start the process by persuading the management to review and change the language, contents, style and symbols used in administrative documents and institutional communication.

It may seem a little thing. However, making institutional communication more gender-sensitive may have multiplying effects throughout the organisation and greatly support the action plan in its implementation and impacts.

### THE PROCESS

Many different approaches are used by the teams to support the management in adopting more gender-sensitive communication. The choice of such approaches undoubtedly depends upon many factors, including some of those already discussed in previous sections, such as the strength and visibility of the team or the involvement of leaders, middle managers and senior researchers.

- ❖ In **Case 1**, the team adopted an approach revolving around the **training of the administrative staff**, so as to lead them to analyse critically the current administrative language from a gender perspective. Despite some minor resistance, the process went smoothly and some significant improvements clearly occurred. Moreover, the team succeeded in including such training in the broader compulsory training scheme for administrative staff.
- ❖ **Case 2** shows an **approach adopting a composite set of tools**, including the development of a practical guide on writing administrative documents, a video on the importance of gender-neutral language, and the review of a set of documents already issued by the administration. In this case, some resistance emerged from different players, based overall on the typical assumption that changing the language is of little help in combating gender inequality.
- ❖ In **Case 3**, a **conference** was organised to promote gender-aware communication in the organisation, involving both internal and external players. The event allowed both to raise awareness on this issue (demonstrating the damage produced by gender-biased communication) and to urge the top management to establish a commission for revising language and contents of institutional communication.

The box below concerns the **monitoring process** of institutional communication set up by a team in Spain, which led to the drafting of a set of **guidelines** for non-sexist use of language in communication.



### FIGHTING SEXISM IN INSTITUTIONAL COMMUNICATION

The team of TRIGGER at the Universidad Politécnica de Madrid has been monitoring sexist language and stereotypes within their institution. The Equality Unit conducts sustained activity that registers and reports cases of use of sexist language or gender stereotypes. On a six-month basis, the cases identified are gathered in a report uploaded on the website of the Unit and submitted to the university management board. Additionally, the website of the Department of Urban and Regional Planning was thoroughly checked for sexist language and systematically corrected, with the aim of establishing it as good practice and an example for other UPM departments and units. This work was completed in the first project period. Based on this experience, a guideline on non-sexist language was drafted and disseminated.

See:

[http://www.upm.es/sfs/Rectorado/Gerencia/Igualdad/Documentos/GUIALenguaje\\_20161202%20\(dic.2016\).pdf](http://www.upm.es/sfs/Rectorado/Gerencia/Igualdad/Documentos/GUIALenguaje_20161202%20(dic.2016).pdf)

## THE CASES

### Case 1 – TRAINING THE ADMINISTRATIVE STAFF TO USE GENDER-SENSITIVE LANGUAGE

**The starting point.** At one of the universities involved, the implementation of the gender action plan in the first 18 months of the project generated the interest of the top management of the academic administration. This allowed the project team to promote a participatory approach in order to enhance the awareness of the administrative staff and their compliance towards changing practices.

**The dynamics.** To improve administrative communication and involve employees, an interactive training course for administrative staff on the use of administrative language in a gender-sensitive way was organised. The course was held at the end of the second project year and comprised 10 hours of class-work, and 5 hours of online training, plus a final test. Thirty-seven employees attended. The course was part of the compulsory training offered by the university to administrative staff. The interest for the issues dealt with increased during implementation. Compared to the others, the head of the office was less motivated and involved. There were, however, no problems, in

the framework of the course, in accepting the idea of performing an analysis of the documents and changing them in a way that was gender-sensitive. The only opposition came from the person in charge of drafting PhD regulations, who found the texts revised according to a gender-sensitive format to be too long.

**Some results.** All the participants appreciated the course, as is evident from the positive rating of 3.7 (out of 4) received in the evaluation. An analysis of the language of administrative documents drafted after the course showed the impact it had on the participants, who were able to adopt the gender-sensitive format they learned in their everyday work. The administrative staff was involved in the document collection and analysis process, also after the course, and in reviewing them according to gender sensitive language. The new university governance bodies asked the team to repeat the course the following year, which they did. The former participants cooperated in the practical part of the new course.

### Case 2 – RESISTANCES TO CHANGE COMMUNICATION STANDARDS

**The starting point.** With the intention of changing the strongly masculine symbolism of science and to make women more confident in pursuing a scientific career, the project team of one of the FP7-funded projects started several actions promoting gender-unbiased language in all internal documents. Among these, a practical guide to help employees in writing documents, a video to increase awareness of the

importance of gender-unbiased language, and a review of the student guide. In general, the team provided watchful and enduring attention to ensure good application of these measures.

**The dynamics.** The team member from the university's presidency, supervising the work of human resources, strongly supported this measure, giving

frequent inputs to the administrative offices to put into practice a non-biased communication style, e.g., improving the language of job offers and other key documents. Despite this, little interest in this aspect (as well as in training sessions on gender equality and diversity) was shown by the employees concerned, who, however, responded positively to the requests from their bosses to comply with the new indications. Open criticism was manifested by different stakeholders (administrative staff, researchers, students, members of trade unions), who questioned the actual relevance of this measure to promote gender

equality. Among middle managers, there were those who refused to adopt gender un-biased language.

**Some results.** Thanks to the joint efforts of Human Resources and the communication service, gender-un-biased language is currently being adopted in the jobs offers to encourage women to apply and also in the Student Guide. The project team presents the issue of gender bias in language during training sessions for students and in the "career path day" for staff. Even though a top-down approach is being used, the result of changing communication standards is being achieved.

### Case 3 – A CONFERENCE TO RAISE AWARENESS ON GENDER-BIASED LANGUAGE

**The starting point.** At mid-term of an EC-funded project, a conference was held pointing out the relevance of a gender aware language, at the initiative of different internal and external pro-gender equality stakeholders (among others, committee on gender equality, research group on gender, pro-vice rector for gender equality, network of women journalists).

**The dynamics.** The speakers were social scientists and linguists, plus some social workers, who presented research studies and practical cases, demonstrating how the use of the masculine with a neutral function in

a neo-Latin languages is almost always associated with the disappearance of women or the belittling of their competences and visibility in different domains (public communications and mass media, different professional milieus, politics).

**Some results.** At the end of the project, some institutional changes were observed in the university. Among others, the new rector's team, which is aware of gender inequalities at the university, has decided to create a commission on gendered language.

## 13. Gender-sensitive education and training

*Dealing with gender in starting a scientific education and career*

### THE ISSUE

To produce long-term impacts, action plans cannot only act on procedures, norms and practices, but they need also to change **people's mindsets and culture**, upon which such procedures, norms and practices ultimately depend. Education plays a pivotal role in this process, especially if we consider that, for institutional change processes to take off, more time is needed than the average duration of an action plan.

As we have also seen in the previous sections, it is not by chance that **gender action plans are usually densely packed with training and education initiatives** addressing different targets.

In this strand, attention is especially focused on the core of the educational activity of a research organisation, i.e., the education of **students and young researchers**, who are destined to become the next generations of scientists and leaders.

## THE PROCESS

Many gender action plans encompass training initiatives designed to introduce gender equality and gendered science in the courses offered at universities. This is often difficult, since such subjects can be viewed as not essential in many disciplinary fields. Hence the need for teams to demonstrate how educating students and young researchers on these issues is relevant for them, the organisation and scientific research at the same time.

The cases below highlight both the obstacles hindering this process, as well as some of the encouraging prospects it opens up.

- ❖ **Case 1** concerns the establishment of **introductory seminars targeting PhD students**, and describes the many efforts made by the team to encourage students to participate, although the initiative was not mandatory for them. Results were promising, especially because the number of participants increased from the first to the second edition.
- ❖ **Case 2** focuses on an **introductory module on gender issues for undergraduate students**, which was much appreciated by the participants and the institution. In this case, initial problems came from the scepticisms and opposition of the administrative staff, who considered gender issues not important enough to become the subject of a specific training activity, nor deserving of the amount of commitment required from them.
- ❖ In **Case 3**, the team organised a **short module on gender in science for PhD students** with the aim of making it permanent. In this case, the main obstacles were the busy agenda of the potential participants, which prevented many of them from participating, and the difficulties of coordinating the courses with other academic deadlines. Despite this, most of the attendees were highly satisfied with their participation, and took part in subsequent initiatives on the same issue.

The following box presents another approach aimed at educating students and young researchers, i.e., the establishment of a **contest** for research work on sex and gender aspects of chemical research.

### A CONTEST FOR STUDENTS ON SEX AND GENDER ASPECTS OF CHEMICAL RESEARCH

The Julie Hamackova Award (JHA) was established in 2015, stemming from the need to communicate the issue of sex/gender analysis for gendered innovations toward the academic staff and to students, and to motivate students to engage in explorations of the opportunities that sex/gender analysis offers. Julia Hamackova was a first female professor and first female dean of a faculty (1956) of the Technical University in former Czechoslovakia. Her name was nearly forgotten, but the history of her career was revived within the TRIGGER project. The Award has three categories, one of which is dedicated to student theses which have an integrated gender dimension. Students can pick one of the proposed topics or they can come up with their own. In this category, the first Julie Hamackova Award for a student thesis with a gender dimension was awarded in 2015, the second in 2016.

See: <https://gro.vscht.cz/files/uzel/0022757/0002~~Poster%20CHJ%20nahled.pdf?redirected>

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## THE CASES

### Case 1 – THE DIFFICULTIES OF ATTRACTING PHD STUDENTS

**The starting point.** At one of the universities involved in an FP7 project, a 12-hour introductory seminar was organised for PhD students in Bio-sciences on gender stereotypes, gender and science, gendered data, and equal opportunities.

**The dynamics.** Two editions of the course were implemented. Participation was not mandatory, so there were not too many people attending, and more women than men. The first edition was divided in four workshops spread along some months. During the second edition, the choice was made to concentrate the workshops in two days, and – in order to have a better idea of the impact of the course on the beneficiaries – a system to collect initial and final feedback from participants was introduced. Practical class work was organised in which the participants were required to draw scissor diagrams representing the inequalities of

gender at their departments, comparing them with the general trends of gender equality in higher education in Europe. In this second edition, participation was higher and satisfaction improved. Part of this enhanced interest was perhaps due to the fact that, more in general, sensitiveness on gender issues in the last year seemed to have increased among students at the university, as was seen during Women's Day. The course tried to link this general mood with an awareness of gender inequalities in scientific organisations and how these latter affect students' lives.

**Some results.** As evidenced in students' feedback, the course was highly appreciated. This pushed the course organizers to propose to the central management of the university that it be extended to other STEM doctoral schools.

### Case 2 – A COURSE FOR STUDENTS FACING SCEPTICISM AND OPPOSITION FROM ADMINISTRATIVE STAFF

**The starting point** One of the country's most advanced universities for gender equality decided to provide an introductory module on gender issues, in the framework of an EC-funded project, to all 1<sup>st</sup> year students at the very beginning of their undergraduate studies. Thanks to this training, the university's policy on equality may be widely disseminated and awareness on gender inequalities and stereotypes raised.

**The dynamics.** When deciding about this massive investment, on the wave of the European project, the project team had to address some scepticism and opposition among the administrative employees of the university faculties. Some of them pointed to the little time available for students at the very beginning of their courses, others the actual need for this kind of training. To ease things, the project team offered to take complete charge of all organisational issues, freeing the other services of any organisational burden (which was the most important hidden obstacle for implementing the initiative).

The initiative was repeated yearly during the course of the project. Implementation was smooth enough. The most important factor was choosing good trainers, able

to make people reflect on the current situation, involving them without inducing a sense of guilt in (mainly men) participants. The choice of the period of the year (at the very beginning of the academic year) was crucial, because of the greater attention of the younger students, their relative ignorance of university rules, which fosters greater receptivity, although there were no credits awarded, poor reciprocal knowledge and relative shyness which enhances concentration.

**Some results.** The team generally received positive assessments from the course participants. Apart from some occasional criticism (e.g. a mother of a student strongly opposing the so-called gender ideology), feedback was good at all levels. Some undergraduate students offered to implement their student work (a period of volunteering in the services of the university) at the gender equality office. Some current master students, now transferred to other universities, reported some years later to their professors of being aware of gender issues in higher education because they had been trained on this in their first year, something they considered an educational standard.

## Case 3 – HANDLING BUSY AGENDAS TO CREATE SPACE FOR GENDER-SENSITIVE TRAINING

**The starting point.** Based on the experience gained during the first part of the project, one of the universities involved in a European project designed and is testing a permanent module on gender in science for PhD students in Engineering and Medicine. Considering the busy agenda of these students, the team decided to concentrate the training module in two days, devoting the first day to an introductory part on the leaky pipeline phenomenon among women researchers, and the second day (to be organised separately for the different disciplines) to deepen aspects related to the gender and sex dimension of research in the respective scientific areas.

**The dynamics.** In the first part of the project, mainly targeting women in engineering and medicine, three courses on the leaky pipeline phenomenon were organised for early-career researchers (including PhD candidates) in the scientific areas concerned. It was not always easy to attract participants, due either to their busy agendas or to the low number of people that made up the target. It was necessary to spread the

word through full professors in touch with the team and to activate all the formal and informal team member networks, plus those of former participants. Other difficulties were related to the concurrence of some academic or professional deadlines, which are not always fully predictable. In any event, once they had started the course, most trainees successfully concluded the training.

**Some results.** Through the input provided by the team and dialogue and exchange among young researchers in the same and different fields, these courses allowed attendees to understand the importance of gender in scientific institutions and raised interest for gendered aspects of research in STEM fields. Some participants in the first edition were also testimonials for the second and the third, enhancing the impact of the training.

The pool of trainees has also been involved in further project actions, and some of them included gendered analysis in their own research work.

## 14. Action plan tailoring process

### *Tailored design and participatory planning*

#### THE ISSUE

The fourth strand of the component pertains to the crucial issue of **tailoring the action plan** to the features and needs of the organisation and the players involved.

It is a crucial issue since fit-for-all solutions do not exist, especially where complex and deeply rooted social dynamics like gender inequality are concerned, whose features and expressions are highly contextual. This does not prevent teams from using the huge amount of experience, knowledge, practices and tools developed in the last decades in promoting gender equality. Rather, it mainly involves the need **to constantly adapt such experiences, knowledge, practices and tools in the new context of application.**

However, such a process cannot only happen through desk work, which is of course also needed. Much more, the tailoring process implies **field work** or, better, **action research**, to be carried out by the team and based on an intense consultation process with beneficiaries and stakeholders.

In this perspective, tailoring should be understood as a **dynamic process**, since the necessary information can only be collected through "**learning-by-doing**" or "**trial-and-error**", for the simple reason that there cannot exist teams who know their own organisation well enough to have control over the many variables and expectations involved in implementing any single action of an action plan.

## THE PROCESS

The main approach adopted by the teams to tailor the action plans to their own organisations was the **participatory approach**, allowing them to constantly interact with the different players involved in the activities to be carried out. Participatory processes are also important in that they facilitate negotiation among the various stakeholders, for example about why and how to organise activities, what are the main aims and contents, who is to be involved, which are the priority issues to be addressed or who will manage them and their results, thus preventing conflicts and facilitating cooperation.

The cases below show how the tailoring process can be concretely shaped through participatory process.

- ❖ **Case 1** shows how the results of a **qualitative study on work-life balance** were used to activate a **consultation** process between the team and the organisational units and leaders concerned.
- ❖ In **Case 2**, the **consultation process** involved women interested in accessing leadership positions, so as to identify the most effective actions to be developed for sustaining their careers.
- ❖ **Case 3** is about a set of **interviews** with young researchers organised by the team in order to acquire in-depth knowledge of the people belonging to this target and to identify their needs, so as to plan and design customised activities to be developed.

In the box below, an example is given of a **participatory planning process** based on the involvement of a network of women researchers established under the action plan precisely to facilitate the tailoring process and to push the activities forward.

### WOMEN RESEARCHERS PLAN TRAINING INITIATIVES

The network of women researchers established at the University of Milan in the framework of STAGES was closely involved in the design of selected activities in the action plan. This was applied to the design of two courses: the School of International Publishing and the School of European Projects Drafting and Management for post-doctoral and early career researchers. Even though publishing and research funding are a need for all researchers, particularly the young, the design was based on the obstacles most frequently met by women researchers, as they emerged from network discussions.

See: <http://www.stages.unimi.it/actionplanCard.php?eventID=2>

<http://www.ingenere.it/en/articles/structural-transformation-achieve-gender-equality-science>

## THE CASES

### Case 1 – RETHINKING WORK-LIFE BALANCE MEASURES BASED ON RESEARCH RESULTS

**The starting point.** In order to implement actions promoting work-life balance, a qualitative study was conducted in the two institutes (both STEM areas) involved in the action plan of one partner university in an FP7 project, as well as in a department of humanities, included to complete the panel and to verify if some work habits were specific to specific scientific areas. The results of the study have been discussed in different structures and university councils to implement new measures.

**The dynamics.** The qualitative study, well supported by the heads of the institutes involved, encompassed different methods, in three steps: field observation (direct observation of the working environment), an online questionnaire and some sociological interviews. Women proved to be more interested than men in participating in the study, expressing their approval of discussions on the issues of work-life balance in their institution. The results confirmed the relevance of time constraints for the researchers' lives, albeit in different



forms at each of the institutes involved. Among others, the use of working time revealed differences between women and men, where the first proved to be more involved in teaching than the second, more intensively involved in research and in more prestigious activities (e.g., organising conferences) than women. Family care where there were children impacted women's careers more than men's.

**Some results.** After presentation and discussion with the departments involved, some changes were decided regarding the measures planned to support work-life

balance. For example, to improve mothers' careers, a new rule establishing that, after a maternity leave, all the women researchers will have a sabbatical leave (i.e., during one semester, they will not teach in order to allow them to do more research) has been introduced. This measure will have a financial impact, since the university will give a specific budget to the departments concerned in order to replace the women researchers who are in sabbatical leave.

Instead, other measures, which were expected to start in the second part of the project, had to be reviewed following the results of the study.

## Case 2 –CONSULTATION TO IDENTIFY WOMEN'S CAREER NEEDS

**The starting point.** In a technical university involved in an FP7-funded project, activities to promote women's careers in leadership positions were inserted in the action plan. The initial idea was to support a pool of motivated researchers, through training initiatives, to start a path towards higher levels of responsibility in their departments, i.e., accessing decision-making boards and committees.

**The dynamics.** Some difficulties arose in the beginning, since it was not easy to identify the target group. Besides this, the idea of measures addressing women to help them access higher positions was not supported enough by the university leaders, on the one hand, and the women researchers, on the other.

In order to ensure the impact of the training sessions, the core team decided to identify aspiring women researchers for qualification and full professorship. This group of women was contacted to ask them to participate in a brief survey aimed at career planning and career development needs. In total, there were 35 responses to a questionnaire. The questionnaire was very effective in identifying career development needs.

In addition, four in-depth interviews were carried out with the target group of women, to deepen the understanding of the obstacles facing women's career progress. The core team, in cooperation with a professional career counselling service, developed a training module of 8 training sessions. Four of these sessions were delivered during the third project year and the other four in the subsequent semester. The training package is comprehensive, and focuses on building competences for managing teams, conflict resolution, interpersonal relations, time management, project management, communication skills.

**Some results.** The evaluation of the first four trainings was extremely positive. Many participants reported some initial scepticism, based on their previous experience with similar workshops, but at the end of the training module they were satisfied and surprised. Some of them added that after the first course the timidity of several attendees lessened and they became a supportive, bonded group of women sharing the same interests.

## Case 3 – A WORKSHOP TO INVOLVE THE TARGET GROUP

**The starting point.** In an FP7 project focused on the younger generations of researchers, the initial phase of interviews and in-depth analysis allowed the team to identify the actual training needs of this target in the two different departments involved in the project.

**The dynamics.** Interviewing young women and men researchers with non-permanent contracts at engineering and sociology departments revealed two different gaps in the training and support on offer for these groups of people. In the first case, the most relevant need seemed to be the capacity to draft projects able to get funded in bids and calls. In this case, the project team organised a workshop on this issue, suggesting, among other things, the inclusion of sex and gender criteria as possible ways to design

more innovative research projects. The second gap derived from the uncertainty about their professional path, which was experienced by both young female and male researchers. It concerned a lack of ability to imagine and plan a career in tune with the qualification obtained within and outside the university. Besides a workshop with successful researchers in private organisations, the possibility of individual colloquia to discuss their careers with senior researchers was given to the attendees.

**Some results.** Participation in both targeted initiatives was high, proving that the design was in line with expectations and that it covered a set of needs which were unrecognized until that moment.

## 15. Policy integration

*Support for and coordination with institutional strategies on gender*

### THE ISSUE

The **integration** of an action plan into the broader policy framework of the organisation is another relevant process which may greatly contribute to increased capacity to have impact in the organization. Through this process, the action plan becomes part of or coordinates with the key policies of the organisation, especially gender policies and all policies affecting gender issues.

In fact, initiatives supported by external entities (typically the gender action plans funded by the European Commission) or promoted by specific players (for example, gender equality measures promoted by networks, associations or trade unions) may be **perceived as stand-alone policies or special programmes**, i.e., something separate from the ordinary policy processes of the institution.

This tendency is **risky** for action plans. First, it may lead staff and leaders to see the action plan as isolated, informal, provisional, negligible, temporary or of little relevance to the priorities and key tasks of the organisation. This can limit the capacity of the action plan to mobilise stakeholders, for example, or to activate long-term processes, modify existing arrangements or gain visibility within the organisation, limiting overall impact.

Hence the need for the team to promote the integration of the action plan into the policy framework, **looking for synergies** with the relevant policies and measures promoted by the organisation and especially establishing **forms of coordination and cooperation** with the managers and organisational units concerned.

### THE PROCESS

Usually, in order to foster policy integration in gender equality or related fields (diversity management, inclusiveness, workplace quality, etc.), the teams offer to provide the management of the organisation with **expertise, resources, and time** to develop institutional policies, even when this may require a modification of the action plan. In this way, the management is urged to progressively incorporate the action plan by merging, for example, action plan initiatives with similar already planned initiatives, including some action plan actions in its own programmes or activating new initiatives together with the team.

Some examples of policy integration processes based on such a strategy are given in this section.

- ❖ In **Case 1**, a team supported the institution in the **application of a national law** on the inclusion of gender aspects in academic curricula. This was possible because the action plan already included actions which were part of the university's plans, so that cooperation was relatively easy to develop.
- ❖ **Case 2** is about strong **synergy** between the team in charge of the action plan and the organisational unit in charge of the implementation within the organisation of a national plan on gender. This result was difficult to attain, as it required a long and time-consuming negotiation process and the implementation of a set of intermediary steps.
- ❖ **Case 3** concerns the great support given by a team to leaders and managers of their organisation in setting up the structure necessary to **develop a gender equality policy**. Support involved aspects such as the creation of gender focal points throughout the organisation, support given to the Communication Department and the implementation of initiatives aimed at involving students.



Another example is presented in the box below, where a team provided its support to the institution in organising a big European event on gender equality.

#### SUPPORTING INTERNATIONAL EVENTS ON GENDER EQUALITY

The TRIGGER team at the Paris Diderot University was entirely included in the organisation committee of the 9<sup>th</sup> European Conference on Gender Equality in Higher Education, which was held on 12-14 September 2016 at the institution. This allowed the institution to reconfirm its public commitment to gender equality and to gain visibility and public recognition on this aspect, thus also maintaining commitments made to the Ministry of Higher Education.

See: <https://9euconfgender.sciencesconf.org/>  
<https://9euconfgender.sciencesconf.org/resource/page/id/>

A different case is described in the subsequent box, which explains how a centre devoted to women in science and engineering in an Irish university, thanks also to its participation in an EC funded project, advanced toward the incorporation of gender equality in the institutional strategies of the organisation.

#### MAKING GENDER EQUALITY A PILLAR OF THE INSTITUTIONAL STRATEGY

To mark International Women's Day 2015, during the INTEGER project, the Trinity Centre for Women in Science & Engineering Research (WiSER) produced a video on Trinity's commitment to gender equality, featuring the Provost and the Vice-Provost/Chief Academic Officer.

The video demonstrates the College's commitment to gender equality as a driver of research excellence, and highlights Trinity's achievements and role as a national leader in driving gender equality in the higher education sector in Ireland.

Trinity has led the way in equality and diversity in Ireland through WiSER and the Athena SWAN charter, in which the College was instrumental in forming a consortium involving six other Irish Universities, as well as 14 Institutes of Technology, and the Royal College of Surgeons.

In addition, there is a commitment to gender equality in the college's 2014-19 strategic plan, being a fundamental principle driving excellence within Trinity College Dublin.

See: <https://www.youtube.com/watch?v=TpB9y-ILWj0>

[http://hea.ie/assets/uploads/2017/04/hea\\_review\\_of\\_gender\\_equality\\_in\\_irish\\_higher\\_education.pdf](http://hea.ie/assets/uploads/2017/04/hea_review_of_gender_equality_in_irish_higher_education.pdf)

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## THE CASES

### Case 1 – SUPPORT TO THE UNIVERSITY IN APPLYING A NATIONAL LAW

**The starting point.** The consideration of gender aspects in academic curricula is a general provision under the national law, an innovative rule which is not always applied in the country concerned. Based on the law, in a technical university involved in an EC funded project, a semester-long elective course focusing on gender contents and methodologies had been inserted in the courses on offer at the university for post graduate students. This course had been inserted in the

Master Program list of courses by the team leader of the European Project many years ago. However, until the beginning of the European project, this course was only on paper, because the professor was on leave of absence and no one else had the specific expertise and interest to teach the course. The European project encompassed a set of actions on gender equality and gender in research, some of which were already in the plans of the university, but still unimplemented.

**The dynamics.** The team leader of the European project is a professor with a long record of studies on gender in research in her scientific area. This made it possible for her, once the project was approved by the EC and she returned to the university from her leave of absence, to actually activate the postgraduate course at her school. Besides this, in the framework of the project, several introductory modules were proposed in different university schools for undergraduate students, too. Following the attention raised on these issues by the project team, other professors, initially not involved, also started new activities on gender aspects in the institution.

**Some results.** The courses were activated and replicated during the project. The Equality Plan approved during the last project year by the university governing board includes measures to consolidate the integration of gender in teaching and research within the institution, thus implementing the law in force. Other initiatives, not part of the project albeit inspired by its concepts, are ongoing. Of particular interest is the current project to participate in an interuniversity Master's Program on gender involving the five public universities of the town where the university is based, funded by the regional government. This master's is now in the approval phase and will probably start next year.

### Case 2 – SYNERGY BETWEEN THE ACTION PLAN AND A NATIONAL INITIATIVE ON GENDER

**The starting point.** Synergies are often established when universities are engaged in applying for national accreditation systems or national award schemes for gender equality or inclusive HR management. In one university, participating in an FP7 project, the gender equality plan, albeit completely independent and original, was also intended as a tool to support the achievement of the objectives of a national award, while at the same time widening and deepening its scope.

**The dynamics.** During the first period of the project, negotiations at university level on how to design and implement a university-wide mentoring programme were held. This necessary step was complex and time consuming, resulting in a delay in the start of the programme. The mentoring scheme was developed and officially launched around project mid-term. It targeted junior academics, research and teaching staff (as mentees); more senior academics (from senior lecturers upward) were given the chance to be mentor. The programme saw the participation of mentor-mentee couples from different departments.

A handbook on good practice for mentoring activities, which is an important support for the mentoring programme, has been drafted and it is currently

published online. Before implementing the action, a literature review on mentoring academic women was drafted, presented at an international conference and published as a paper in an international peer-reviewed journal.

Collaboration with the HR department, coordinating the efforts of the institution in applying for the national award, brought to the launch of a second edition, one year later.

**Some results.** Besides successful implementation, an important result for the institution was to overcome the first rejection of its application for the national award, also thanks to the efforts of the project team. This latter, in turn, achieved internal authoritativeness and visibility, thus deserving to be represented in all the gender and equality-related committees in the institution. The participation in the self-assessment team of the University for the national award was especially important to plan the future sustainability of the mentoring and the leadership programme encompassed in the European project. Also, the contribution of the project team was essential to lobby for the university to become a member of a national campaign for gender equality in science.

### Case 3 – HELPING THE ORGANISATION TO SET UP ITS GENDER POLICIES

**The starting point.** One of the EC-funded European projects took place in a period of particular regard for gender issues in the organisation (i.e., launch of activities on gender in research and curricula, appointment of a gender officer), but in which internal infrastructures on gender equality were not as yet very developed. Following the implementation of the project, which implied huge visibility for the leadership's commitment, new expectations and demands for intervention emerged from different stakeholders, asking the leadership to enhance and

diversify the gender policy of the institution, to take action on different problems – e.g., sexual harassment – and to be involved permanently in its implementation.

**The dynamics.** The project team tried to address some of the issues raised by the different components of the university. In particular, the decision was made to involve students, listening to their requests and trying to take them into account in designing new initiatives and tools targeting them (e.g. reviewing the students' charter in a way that was gender sensitive). Besides

this, the team supported some of the campaigns on gender-related issues proposed by different stakeholders.

A network of gender focal points was created to act as interface with the university population. The team also supported the communications department (initially sceptical with regard to these kinds of activities) in creating a message and setting communication tools

(e.g., a newsletter) which will be kept as part of institutional communications.

**Some results.** The institution's gender policy is now more visible and active, well beyond the expectations of the project team. Unexpected interest was raised in students, professors and managers, and new initiatives were developed, starting from the initiatives launched by the project, but continuing quite independently of the project team.

## 16. External backing

### *Networks and alliances with external actors*

#### THE ISSUE

Producing an impact on the organisation often requires the team to look for **support from actors and stakeholders outside the organisation**.

This issue has already been touched upon, in the previous section (point 8), stressing the importance of involving external pro-women players, which indirectly strengthens the capacity of the action plan to attract internal stakeholders.

Here, the same issue is discussed in more general terms.

Any research institution is in fact part of a broader system of relations and obligations. None of them can be viewed as an isolated and fully autonomous entity. For this reason, any internal policy has an impact on external policies and vice versa.

The same can be said for gender action plans. They **cannot be understood as part of the organisation's "internal affairs"**. Rather, any action plan, regardless of its features and contents, is immediately part of broader dynamics going beyond institutional boundaries and affecting the local, national and even the transnational level. This becomes further evident in the action plans included in EC-funded projects, where inter-institutional connections have existed from the beginning.

On a very practical level, teams often successfully used external cooperation and networking initiatives to **pursue different aims related to their action plans**, such as addressing internal resistance, accessing additional resources, increasing their internal visibility, making the leaders' commitments more binding and offering support to the organisation in implementing its public relations policies.

#### THE PROCESS

There are a variety of **ways to get external backing**. In some cases, external links are established to develop specific actions, while in other cases they involve the team in itself and the action plan as a whole. Also the kind of external stakeholders involved may be of different types, including national governmental bodies, gender equality programmes, women's networks and associations, research and professional communities or other universities and research organisations.

The cases presented below help understand how such complex dynamics may occur.

❖ In **Case 1**, the team **promoted a new national professional network and joined other associations**, with the aim also of addressing the many obstacles met within the institution. This

strategy proved to be effective from different standpoints, since it allowed the team to increase the chances of continuing some of the actions launched under the action plan or to extend the internal impact of the action plan as a whole.

- ❖ In **Case 2**, the team **extended its range of action from one to several universities** belonging to the same consortium of university institutions. Thus, an action plan initially intended to be implemented in one single organisation had the opportunity to be at least partially conducted in many research institutions. This process was complex and not free from obstacles and difficulties of different types.
- ❖ **Case 3** involves a team that increased its **engagement at national level**, leveraging also upon its skills and capacities on gender issues, to look for external backing to address effectively resistance and obstacles within the organisation.

In the box below, a case is presented involving two agreements established by a team with local and national health public authorities on the gender/sex dimension of health.

#### COOPERATION AGREEMENTS ON GENDER HEALTH

In order to guarantee a favourable framework for gendering contents and methods of scientific research on health, the TRIGGER team at the University of Pisa launched a collaboration initiative with two strategic partners, one at regional and the other at national level. The work performed and the negotiation process held led to the signing of two framework agreements for promoting gender equality in research and gendering contents and methodologies, respectively with the Region of Tuscany, specifically the Department of Health, and the National Institute of Health, the leading technical/scientific body of the Italian National Health Service.

See: [http://triggerproject.eu/wp-content/uploads/2017/02/Newsletter-5\\_def.pdf](http://triggerproject.eu/wp-content/uploads/2017/02/Newsletter-5_def.pdf)

### THE CASES

#### Case 1 – EXTERNAL NETWORKS TO STRENGTHEN THE ACTION PLAN INTERNALLY

**The starting point.** At one of the technical universities implementing a gender action plan in the framework of an EC project, the creation of a new network of women researchers was planned. Its purpose was to foster participation and support for the development and implementation of the action plan, then to be institutionalised and function as a permanent actor within the University. The core group in the network should have included women from two out of the three faculties participating in the project, later to include the third and progressively reach interested women professors and researchers at other faculties and schools.

**The dynamics.** This action was slightly delayed due to the relatively low interest, among women professors and researchers, in setting up a more formal way of working together, and also because of a sort of self-imposed lack of visibility among some of them, connected maybe to an underestimation of their own

scientific merits and roles, but mostly to their desire not to highlight their specific situation as professional women. In order to create a core group of inspiring women, a blog was created around the mid-term of the project, intended as a seed for the network, but also as platform to make women and their work more visible. Political changes within the university led to a different institutional policy which did not support specific actions to make women visible such as an only women's blog showcasing their work. This affected also the part of the original draft of the Equality Plan included in the EC project, where this network was a part of the measures to promote women equality. In order to accelerate change, the team then decided to re-adapt the initial idea, creating an outward initiative, by strengthening existing external networks and creating new ones, related to both scientific personnel and equality officers at national and international level. Two members of the project team are in the founding group of a new professional association at the national

level. Thus, some other action plan operations can be connected to the Association, in order to reinforce and extend their impact. Some other collaborations and networking activities with external organizations, such as other professional bodies, local authorities and private companies, were initiated or intensified.

**Some results.** The redesign of the initial idea about outside collaboration and networks had some positive aspects. First, it made networking more independent

from university boundaries and contributed to its sustainability beyond the life of the European project. Secondly, this kind of networking was able to reach both researchers and professors at the university in a different way and with a wider field of action. Thirdly, it also extended its scope to further women, because most of the students develop their professional careers outside the academic sector.

## Case 2 – A COMPLEX EXAMPLE OF COOPERATION AMONG UNIVERSITIES

**The starting point.** One of the universities implementing a gender action plan funded by an EC project is also member of a consortium of universities which was created following a national reform. During the initial phase of the European project, the project team at the university proposed to the other institutions forming part of the consortium to develop a common gender equality policy. After intense negotiation, the leadership of the consortium asked the project team to coordinate the network of the equality officers appointed at each member university, providing it also with funds to extend the project action to the other institutions.

**The dynamics.** During the first year of the project, some of the planned actions were slowed down at the university due to a change of institutional leadership. A long time was necessary for the project team to be

accredited, and to present to the new management team the opportunity to change some internal rules in an openly pro-women direction. This process, indeed, would have required a clear political positioning and risked being controversial, in a turbulent moment of transformation of the national higher education system. On the other hand, the project team intensified its inter-institutional efforts, e.g., extending the gender equality training offer to the other universities of the consortium and creating new common initiatives (e.g., a service against sexual harassment).

**Some results.** The initiatives conducted were echoed and praised by the national media, and the university increased its public prestige. All these effects provided substantial evidence about the effectiveness of the gender action plan proposed by the project team, thus contributing to overcoming internal resistance.

## Case 3 – INCREASED VISIBILITY AT NATIONAL LEVEL AND ITS IMPACTS IN THE ORGANISATION

**The starting point.** The project team of a technical university in a male-dominated field involved in a structural change project devised a complex and challenging gender action plan, including gender equality actions and promotion of gendered research, the first of its kind in the country. This happened in a general national and political context which was not favourable to gender policies, with a conservative attitude in society in general, and among men in particular. Some actions of the plan aimed at establishing constant relationships with other universities and research centres involved in EC projects all around the country.

**The dynamics.** The university leadership showed mild interest initially. At mid-term, after the renewal of the management with persons partially different from the ones who followed the action plan from its very beginning, the project team, not surprisingly, faced strong resistances. These mainly came from middle managers, a very busy group with priorities different from gender equality (for example, two planned workshops targeting them had to be cancelled). Top management, even though generally less hostile,

proved to be a problematic group as well, difficult to involve, mainly because of their multiple commitments. A certain interest, but not strong support, came from a group of women full professors of the university, who periodically convened. Despite internal difficulties, the project team continued its networking activities, extending the scope of its external relationships at national level, creating and being actively involved in working groups dealing with gender issues and innovation with representatives of the Ministry of Education and other public authorities responsible for European research. This external activity and visibility was to an extent echoed in the institution, on the occasion of public initiatives.

**Some results.** The team succeeded in devising, and in some cases completing before the end of the project, a wide array of activities, some of which were really innovative, reaching different kinds of beneficiaries, also thanks to the increased external reach of its action.

## Making an impact

### *Key issues*

*In this section, the focus is on the process that allows an action plan to have an impact, in terms of institutional change, on the organisation. The section doesn't explore how to implement an action plan, but rather which **recurrent factors may come into play in making an impact more likely to occur** while implementing an action plan.*

On the basis of the mutual learning process carried out under the TRIGGER project, **six factors** were discussed:

- ❖ **Self-reflexive processes** (the action plan introducing procedures and mechanisms allowing the organisation to be aware of and anticipate intended and unintended consequences of their or others' actions on gender equality)
- ❖ **Gender-sensitive communication** (the action plan supporting the adoption of gender-sensitive communication in the organisation to increase the potential impact of the implemented actions)
- ❖ **Gender-sensitive education** (the action plan inducing a change in the culture and mindset of future generations of researchers and leaders through educational programmes)
- ❖ **Action plan tailoring process** (the action plan adapting its approach and continuously tailoring its action to the features and emerging needs of the organisation)
- ❖ **Policy integration** (the action plan establishing synergies, as well as forms of coordination and cooperation, with existing relevant policies of the organisation)
- ❖ **External backing** (the action plan establishing forms of cooperation, coordination and agreement with external players so as to strengthen its impact on the organisation).

There will surely be many other factors that greatly influence the impact-making process. Nonetheless, those presented here highlight how implementation dynamics can be managed by the team.

In this regard, some key issues can be singled out.

#### **Careful handling of the concept of impact.**

The concept of impact is necessary, but at the same time extremely difficult to manage. It is of course necessary, since it represents a guiding principle for a team interested in triggering significant changes in the institution. However, when used as a parameter to evaluate an action plan, it becomes almost unmanageable, for different reasons: it is a vague concept (actually, everything can be understood as an impact); the majority of impacts take time to occur and often they occur after the action plan is completed; sometimes, unexpected and unintended impacts prove to be more important than those proactively pursued; intangible and difficult-to-measure impacts (for example, changes in social and cultural attitudes) are, in the majority of cases, more meaningful than the impacts which can be easily measured. Thus, using the concept of impact is necessary; but careful handling is equally necessary.

**Adopting an open-minded and flexible approach.** Many examples provided in this section suggest that, in many cases, producing impacts entails profound changes in the action plan as it was originally planned; for example,

changes in alliances with other players, changes in methods adopted, changes in the scope and nature of the actions to be carried out, changes in the timeline of the activities or changes in communication styles and contents. Hence the importance for a team to adopt an open-minded and flexible approach to the action plan, to avoid it being viewed as an end and not as a means. Uncritically sticking to the established plans is not a productive strategy.

**Understanding negotiations as the main tool for making an impact.** A discussion of this section allows us to identify another key element which comes into play in the impact-making process, i.e., negotiations. As a matter of fact, the major effort the teams are continuously making throughout the project centres on negotiations over the action plan with many actors, individually or collectively: negotiations on contents, timelines, priorities and activity methods; negotiations on players to be involved, their tasks and roles; negotiations on data and interpretations about gender inequality dynamics in the organisation; negotiations on the language to be adopted or the messages to be launched; negotiations on rules and procedures. Thus, it is extremely important for the team to understand the key role played by negotiation in producing impacts, at different levels (symbolic, interpretive, normative, operational) and in different domains (work-life balance, women's careers, gendered science, women's leadership), and to learn rapidly how to negotiate effectively and appropriately with the different stakeholders.

**Leveraging on existing tools, policies and opportunities, when possible.** It is naive to think that an action plan could produce remarkable impacts in the institution by acting alone. Action plans would not have the resources, political power and time perspectives necessary to permanently change the situation. This is the reason why many teams see their action plans as a sort of a triggering device, i.e., something able to activate broader change mechanisms in the organisation. It is therefore extremely important for the team to identify existing tools, policies and opportunities which the action plan may support, activate or enhance, in order to multiply its own impact and to produce new ones.

**Keeping a realistic view of impacts.** As shown by experience, many actions often prove to be much more difficult and complex than they were supposed to be. As for the impacts, usually they take time to occur and, as we have already noticed, often even more time than the duration of the action plan. Having too high expectations of the impacts could be damaging, since it may induce a sense of disappointment and frustration in the team, or in the other involved actors. Alternatively, it may lead to seeing impacts that are not still there. Probably, the most productive attitude is to be realistic and perceive the action plan as a step in a broader process, capable of producing a set of impacts, but mostly important to allow the entire process to go on.



## AREA 4 – Sustainability

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The fourth and final component of the process of change is **sustainability**. This notion, in the context of project management, refers to the capacity of a project to ensure that its outcomes continue after the end of the external funding.

In the case of gender-oriented institutional change projects, sustainability has a crucial role. The very adjective "institutional" suggests that the changes introduced in the organisation should be, if not permanent, at least **sustainable in the long run**. An institutional change which disappears with the end of the action plan or because of a simple leadership turnover is not institutional by definition.

Even if sustainability refers to something which is expected to occur after the completion of the action plan, it is misleading to think of it as something which automatically happens (or does not happen), as if it were a sort of a final judgement for the action plan: if it is good, it will continue; otherwise, it will stop.

Sustainability could rather be described as an output of a process which develops **all through the action plan** and can be **driven** (at least partially) **by the team**.

This section concerns precisely such a process and, in particular, how teams usually manage the problem of creating the conditions for the actions initiated under the action plan to be embedded in the ordinary activities of the

research organisation, or to be taken over by someone else.

There are **some necessary requirements for sustainability**. Some of them are evident enough: for example, that new funds are allocated to replace those provided by the project, or that actors in addition to other than members of the project team become responsible for or involved in the action. Many other conditions are difficult to identify in advance and emerge only while the process proceeds.

In the light of the mutual learning exercises developed under TRIGGER, some recurrent elements seem to have an influence on sustainability. In particular, in this section, **five strands** are discussed, all of them pertaining to the embedment of gender in some key organisational processes:

- ❖ Inclusion of gender in monitoring systems
- ❖ Inclusion of gender in scientific excellence
- ❖ Inclusion of gender considerations in service provisions
- ❖ Inclusion of gender in the organisation's standards
- ❖ Inclusion of gender in the organisation's structure and mission.



## 17. Inclusion of gender in monitoring systems

*Permanent tools to monitor gender equality in the institution*

### THE ISSUE

It is difficult to sustain commitment to a gender action plan if gender issues are not perceived as strategic by management and staff; and they are not likely to be considered strategic if they are not detected by the "sensors" used by the organisation to keep its internal and external environment under control.

The "No data, no problem, no policy" concept is appropriate here. Lack of data about gender dynamics in an organisation makes it easier to deny, overlook or practically neglect gender inequality. This, in turn, makes it easier for investment in gender policies to be considered unnecessary and to be discontinued.

**Breaking the loop** starting with its first element – "no data" – is therefore a **pre-requisite for sustainability**. The lack of gender monitoring mechanisms generating data and information about gender inequality (its features, dynamics, impacts, etc.) largely contributes to making actions against gender inequality marginal, questionable, not assessable and finally not sustainable.

### THE PROCESS

The teams propose a wide range of techniques and methods to monitor gender dynamics. However, the main problem the teams usually have is not that of developing such techniques and methods, but that of pushing organisations to adopt and integrate them in their usual monitoring procedures. In this regard, different strategies are devised, as shown in the cases presented in this section.

- ❖ **Case 1** describes one team's attempt to institutionalise a **self-updating database** on the situation of women and men within the organisation, leveraging upon the interest of the top-managers in this initiative. The case also shows how administrative and bureaucratic dynamics may hinder, slow down or endanger the process.
- ❖ **Case 2** focuses on an attempt to introduce **gender budgeting** as a method for detecting gender inequality in all aspects of the life of a research organisation. In this case, the team succeeded in pushing the management to establish an internal commission to introduce gender budgeting as a permanent monitoring tool.

In the box below, another example is given of the establishment of a **permanent observatory** on gender equality in an Italian university.

#### A PERMANENT OBSERVATORY ON GENDER EQUALITY

During the first project year, the team of GenderTIME at the University of Padua promoted the creation of an Observatory of Gender Equality providing data for all the university and cooperating with all the bodies in charge of equality issues at the university. It is composed of both administrative and scientific personnel, belonging to different areas, including also representatives of undergraduate and graduate students. The coordinator is the project team leader and it is set to be a permanent structure of the university.

See: <http://gendertime.dei.unipd.it/?lang=en>

<https://www.unipd.it/osservatorio-ateneo-pari-opportunita>

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## THE CASES

### Case 1 –A DATABASE OF GENDERED DATA AIMING AT INSTITUTIONALISATION

**The starting point.** One of the action plans, funded thanks to an EC project, encompassed the creation of a self-updating database on the situation of women and men, mainly focused on the 6 STEMM departments targeted by the project, but also containing information on the whole university and comparative data on the national situation. The database was created through links with existing databases which were not entirely public and connected. A specific part of the database is connected with in-depth information on CVs and publications by women scientists who accepted to have them published (among them, the delegate of the Rector on gender equality and gendered research).

**The dynamics.** Despite the team having a clear idea of the final output and the requirements needed, the implementation of the public bid for the database was slowed down by the overly bureaucratic procedures of a public university. After concluding the identification of a subcontractor (at the end of the second year), the

third year was almost entirely dedicated to the implementation of the online database. It was created and could be accessed and queried through a web platform at the end of the third year. During the fourth year, the database and the related online platform were regularly updated. The persons in charge of implementing the platform were completely in tune with the project team, thus there were good matches for with all their requests. The only problem is the precarious status of the statistician in charge of the database, an employee expressly hired for the project.

**Some results.** The database is currently being used by the project team to monitor the situation of female scientists and illustrate it to all interested stakeholders. Thanks to this, the general director of the university, as well as the new rector, are particularly interested in using the database as a monitoring tool also for their current human resources policies in the future.

### Case 2 –A COMMISSION FOR THE INTRODUCTION OF GENDER BUDGETING

**The starting point.** During the last project year, the team leader of an FP7-funded project, and another person involved in it, participated in a meeting devoted to gender budgeting, held by various national representatives of European projects. On this occasion, their idea was to introduce this methodology also in their university, taking individual elements from the different approaches proposed in the meeting, but also adding some new aspects specific to the experience of their university.

**The dynamics.** The project representatives decided to launch gender budgeting through a training initiative for the administrative staff of the university. Thanks to an agreement with the office in charge of employee training, the gender budgeting initiative was included

in the training courses offered by the university. Both administrative managers and heads of department participated in the training and were very interested in the topic.

The initiative raised interest and new awareness in the administrative and scientific staff attending the training and also beyond, gradually involving new people in the university.

**Some results.** Based on the expectations created by the training, the proposal was made by the Rector's delegate for gender equality to create a commission for gender budgeting in the university. The rector appointed the commission, intended to be permanent, and the activity of gender budgeting was launched.

## 18. Inclusion of gender in scientific excellence

*Shaping research organisations around a gender-aware understanding of science*

### THE ISSUE

The second strand of sustainability concerns the notion of **scientific excellence**. The connection between sustainability and scientific excellence might not be evident at first glance, even though it is strong and direct.

This happens because there is the tendency, among researchers and research leaders, to distinguish drastically between **science as a specific working environment** and **science as a specific form of knowledge**. While science, as working environment, is viewed as gender-biased (as any other working environment), science, as a specific form of knowledge, is strangely viewed as not biased at all, as if the way in which the working environment works had no impact on how scientific knowledge is produced.

This fostered and is still fostering the idea that advancements and scientific recognition are only regulated by **criteria of scientific excellence**, such as merit, creativity, skills or specific moral attitudes (such as courage or commitment).

This view is misleading, since it fails to acknowledge that **all science** – socially, substantively and symbolically–has been shaped on specific cultural and social patterns, which are largely gender-biased. This has very **practical and measurable consequences** on aspects such as women’s careers, research contents and methods, peer-review evaluation processes, access to research funds, or scientific recognition and awards.

Thus, challenging the current views of scientific excellence is not just a philosophical battle, but a necessary step to increase women’s ownership of science, which in turn increases the **sustainability perspectives of the action plans**.

Indeed, it is practically useless and, in the long-run, **unsustainable**, to implement actions aimed at promoting gender equality when science remains anchored to principles and symbols which provide the ground to and justification for inequality.

### THE PROCESS

There is not a simple and linear approach to addressing scientific excellence as a gender-biased social construction. Teams actually tend to adopt **tools acting at different levels** – symbols and communication, norms and regulation, public dialogue, awareness-raising, etc. – trying to produce long-term impacts on how scientific excellence is viewed and practised.

In this regard, the cases presented in this section clearly exemplify the tendency of combining different kinds of actions.

- ❖ In **Case 1**, the team launched an **award named after a woman scientist** and associated it with a contest to promote the sex/gender dimension of science. Other initiatives have also been connected to the award, including training modules and initiatives aimed at mobilising women scientists.
- ❖ **Case 2** presents the team’s efforts to connect gender equality and scientific excellence through a **multiple-action strategy** including, among other things, the establishment of alliances with other internal actors and lobbying aimed at activating a national award for gender equality in research.

The box below presents another way of promoting a cultural review of the understanding of scientific excellence, i.e., the establishment of a UNESCO Chair on Gender Equality in Science, Technology and Innovation.

### UNESCO CHAIR ON GENDER EQUALITY POLICIES IN SCIENCE, TECHNOLOGY AND INNOVATION

At project mid-term, the TRIGGER team of the Technical University of Madrid received confirmation of their application for a UNESCO chair, the first UNESCO Chair on Gender in a technical university in the world, and one out of around 12 actively dealing with gender. The UNESCO-UPM Chair on Gender has a double objective. Firstly, to improve the level of participation and leadership of women in science, technology and innovation, and supporting structural changes in organisations to achieve this aim. Secondly, to advance the integration of gender perspectives in research, technology and innovation, and in higher education curricula in technological areas (engineering, planning, and architecture). The chair has joined different existing associations and working groups at national and international level, and has promoted some new ones. It also signed agreements with other institutions and has worked for some public administrations providing consultancy.

See: <http://unsdsn.org/where-we-work/members/unesco-chair-on-gender-equality-policies-in-science-technology-and-innovation-universidad-politecnica-de-madrid/>

[http://www.unesco.org/new/en/unesco/themes/gender-equality/resources/single-view-gender/news/first\\_of\\_its\\_kind\\_meeting\\_with\\_unesco\\_chairs\\_on\\_gender/](http://www.unesco.org/new/en/unesco/themes/gender-equality/resources/single-view-gender/news/first_of_its_kind_meeting_with_unesco_chairs_on_gender/)

## THE CASES

### Case 1 – AN AWARD FOR BREAKING MALE-DOMINATED PRACTICES AND VIEWS OF SCIENCE

**The starting point.** To root gender topics in the academic life of a technical university, the project team of an EC-funded project proposed to the leadership to create an institutional award named after a well-known woman scientist in the university's field of study. In its first edition, the award encompassed two categories: a contest for students' research works that integrated a gender dimension and a prize to an outstanding woman researcher for her contribution to the development of science, research, pedagogy and innovation. In its second edition, one year later, a further category was added, i.e., an award to an employee who made significant contributions to the field of supporting and promoting equal opportunities in working relations and research.

**The dynamics.** Initially, the award was funded and organised in the framework of the EC project, to launch an innovative and challenging strand of activities (i.e., gendered research in a very technical STEM field). Besides this, an internal team worked on these issues,

organising training initiatives and involving women professors in suggesting topics to be proposed for the students' works. Moving on to the second edition, the team noticed a significant improvement in the quality of the students' works submitted.

**Some results.** The award was officially presented in the first year by the rector and in the second year by the vice-rector for research. The rector, the vice-rector for strategy and the bursar took part in the ceremony. The news and photos were published on the main web page of the institution.

Thanks to internal negotiation and the good results of the first year, the university management decided to fund the prizes for the researcher and the employee from the institutional budget and to institutionalise it. As for the contest for the students' research works, the commitment was expressed to use the research department budget to fund it for the years to come after the end of the project.

### Case 2 – A MULTIPLE-ACTION STRATEGY FOR CONNECTING GENDER EQUALITY AND SCIENTIFIC EXCELLENCE

**The starting point.** One of the first EC-funded projects for structural change took place in a university with a long history of gender equality, where the commitment

of the leadership was evident, a sort of gender hub was already in place and three teams were actively operating in as many STEM faculties to promote

gender equality. Despite the long-standing effort, the internal evaluation of the project underlined the difficulty, among other things, in changing management practices, so as to introduce durable mechanisms to ensure gender equality.

**The dynamics.** Through the action plan, gender bias has been addressed at all levels, including the top management, through a set of various actions (e.g. collection and dissemination of sex-disaggregated data, improvement of women researchers' visibility, institutional benchmarking). New internal alliances have been established and internal consensus has grown. Besides this, the project team (based at the gender hub) has participated in political lobbying at national level to introduce a system of awards for

universities and scientific institutions which already exists in other countries and which promotes gender equality as a mark of excellence. At the beginning of the last project year, a new strategy for national higher education was launched, including the activation of the awards.

**Some results.** The set of measures devised by the project proved successful. A set of dissemination tools (including a video) show how the university is now officially committed to promoting gender equality as a strategy to foster academic excellence, attracting and retaining the best female and male talents, also by applying for the national award system, which will allow, in the years to come, to support the project team so it can continue its gender equality activity.

## 19. Inclusion of gender considerations in service provision

*New or extended services for emerging needs*

### THE ISSUE

Science is a highly competitive environment. Especially in some research fields, it is based, even more than in the past, on an increasing number of researchers who are driven to offer their **total commitment**, under uncertain temporary contracts and high mobility levels, to work as hard as possible with a view to obtaining a permanent position, sustained by the myth and charm of science. Few of them, however, succeed<sup>12</sup>. Most give up and change their career paths, sometimes from personal choice, but more often due to lack of opportunities, coupled with insufficient support from the organisations.

**Women are more exposed** to this kind of mechanism than men, because of the unbalanced distribution of family care and parental leaves between men and women, unfair access to scientific recognition, rewards, salaries and research funds. Thus, women risk working more to get less, and it is not surprising that they leave scientific careers remarkably more often than men do.

This perverse dynamic also concerns the **sustainability of gender action plans**.

Indeed, an action plan promoting women's careers without ensuring provisions and services which – even if open to all – are tailored to women's experiences and needs, is simply not sustainable. It could even paradoxically be a sort of trap, increasing their full commitment to science without providing the needed support to manage their lives as a whole.

This strand therefore concerns a pivotal issue, i.e., how **to support women through services and provisions** geared to make science a friendly environment, to back them in areas of professional life where they are particularly exposed to the risk of exclusion, or to manage the burden of care.

<sup>12</sup> In European academia, women are 40-60% of the PhD holders, but only 21% of the full professors.

## THE PROCESS

Beyond the individual initiatives, it is interesting to observe that there are many possible services and provisions which could be helpful to women, as well as the amount of resistance that the teams often meet while trying to introduce them.

- ❖ In **Case 1**, the team promoted the establishment of support services to prevent and manage cases of **sexual harassment** in the working environment. The team had to face resistance and opposition from some leaders, who perceived the establishment of such services as a public admission that a problem of harassment actually existed in the organisation, which was generally dismissed.
- ❖ **Case 2** focused on a successful attempt made by a team to **give** young researchers with temporary contracts **access to services which** until then had only been accessible to employees with a permanent contract. Also in this case, resistance was reported.
- ❖ **Case 3**, finally, concerns services to help researchers, especially women, **commercialise their research results**. The example is interesting, since women usually meet more obstacles than men also when innovation processes are concerned, but services and provisions in this domain are extremely rare.

In the box below, another case is briefly presented of a team engaged in extending benefits to temporary researchers which previously had only been enjoyed by the permanent staff.

### EXTENDING THE BENEFITS OF PERMANENT STAFF TO OTHER TARGETS

In concurrence with the implementation of the GARCIA project, and in the framework of its Plan of Positive Actions for Equal Opportunities 2014-2016, the University of Trento decided to participate in the "Family Audit" Project, aiming at gaining a national certification based on the recognition of efforts to reconcile employees work and family lives. Over the next three years, the University will thus define and implement a series of actions aimed at facilitating the reconciliation of the work and family life of all its employees and staff, including personnel on fixed-term contracts. At the end of the project, a permanent platform was created for PhD students and research fellows, where it is possible to retrieve information about rights and duties of researchers with non-permanent positions.

See: <http://www.unitn.it> <http://www.unitn.it/en/ateneo/51638/work-life-balance>  
<http://webmagazine.unitn.it/news/ateneo/19621/piano-di-azioni-positive-2017-2019>

## THE CASES

### Case 1 – SERVICES FOR COMBATING SEXUAL HARASSMENT

**The starting point.** At one of the partner universities of an FP7 project, the decision was made, after the beginning of the project, to add to the initial action plan an important strand of activity, related to combating sexual harassment. A preliminary study of the needs of the organisation, as well as an international review of some current experiences were conducted. The national context was favourable, since during the second project year the minister of higher education had recommended creating structures to address this

issue. Also the local context was supportive, since the university belongs to a network of universities whose president shared the idea and provided a budget for all network members.

**The dynamics.** Despite the favourable circumstances, convincing the president of the university to take action against sexual harassment took more than one year. The president of the university was reluctant to admit the existence of the problem of sexual



harassment, due also to the fear of how it would be communicated externally, on the media. It was necessary to lever on competition between universities and take examples from other countries (for instance, the team told the top management about cases in Canada, explaining positive and negative aspects). The solution found was to create an external structure to serve multiple universities, at the premises of a medical department.

**Some results.** The structure is now fully operational, established with a multiannual contract and a triple mandate (receiving victims, helping victims and training different university professionals), endowed with a yearly budget. In less than one year, around 20 cases were treated, some of which were really serious, thus confirming the relevance of the issue. A working group has been created at the faculty of Medicine, where the situation appears worse than elsewhere.

## Case 2 – SERVICES AND PROVISIONS FOR PROTECTING YOUNG TEMPORARY RESEARCH WORKERS

**The starting point.** In a technical university implementing a gender action plan, retaining young researchers, mostly women, is very difficult, due to the general situation of higher education in the country. Furthermore, in a moment of economic crisis, trade unions mainly protect the interests of the employees rather than those of temporary researchers. Precariousness is very high and supporting early-career scientists is a challenge that the project has tried to address.

**The dynamics.** In this framework, the project team tried to enlarge the support offered by the university to young researchers. Starting with the first project year, thanks to the action of the team leader, use of the internal kindergarten was also offered to the children of PhD students. Some informal mentoring and advice on career aspects were also implemented. Besides this, the project team leader started internal negotiations with the university management team to promote a human resources policy suited to the population of the university, conducting meanwhile, together with representatives of other universities, lobbying action

with the ministries responsible, designed to get more job stability for young researchers. In the second part of the project, the university decided to create a Career Advisory Department, for students and early-career researchers, involving in it the project team coordinator and taking on some of the training and counselling activities initially performed under the umbrella of the project.

**Some results.** The activity of advocacy to obtain more stable contractual arrangements for early career researchers failed because of the general situation, related to an increase in competition for funding distributed through grant competitions, which has increased work precariousness as temporary contracts are the norm. This condition, according to the rectors, makes it impossible to employ people on a permanent basis due to the uncertainty of funding. Instead, internal provisions for supporting this target group, enabling them to look for career opportunities also outside academia, will continue even after the conclusion of the project.

## Case 3 – HELPING WOMEN RESEARCHERS TO COMMERCIALISE RESEARCH RESULTS

**The starting point.** A university involved in a European project focused one of its actions on the aspect of commercialisation of research products, to verify if and how women are disadvantaged in harnessing the results of their scientific work, and aiming to improve women scientists' opportunities to commercialise their research by building synergies with other relevant players outside the university.

**The dynamics.** During some preliminary internal and external meetings with the actors involved in commercialisation, the team realized that commercialisation activities were quite low, independently of the researchers' gender. Subsequently, a university-wide survey was elaborated and launched to further understand the interest, involvement, and future plans of the scientific staff in relation to commercialisation activities. This survey

confirmed the results emerging from the previous meetings, i.e. the level of commercialisation is low, and also, commercialisation is considered a particularly time-consuming activity in which many academics seem to be reluctant to engage. The results from the survey were presented to the two faculties in which the project was operating. The project team proposed to appointing innovation "champions" in departments and research groups, i.e. members of the staff who can help colleagues to understand and develop the commercial potential of their research.

**Some results.** As a result of the action geared towards verifying the state of the art of commercialisation, and subsequent proposals, in one of the two faculties a "Research Development Manager" was appointed in the second project year.

## 20. Inclusion of gender in organisational standards

*Binding procedures to make gender equality actions permanent*

### THE ISSUE

The fourth strand of sustainability emerging from the mutual learning exchange carried out under the TRIGGER project pertains to the embedment of gender issues in the **standards adopted by the organisation**.

As we already highlighted above, institutional change also means changing the "rules of the game"; and such rules are inevitably embodied in a set of organisational standards, be they established procedures, norms, protocols, or standardised documents.

Thus, an action plan which does not succeed in **embedding its actions in the organisational standards** is not sustainable and risks remaining temporary, marginal and isolated from the dynamics of the organisation, in short, something unable to trigger long-term institutional changes.

### THE PROCESS

Embedding the actions in the organisational standards is the most pursued strategy adopted by the teams in order to make them sustainable in the long run. However, the process may be much more troublesome than expected, since standards have much to do with the allocation of power within the organisation.

Three cases are presented here in this regard.

- ❖ **Case 1** focuses on a team which proposed the adoption of a **European quality label pertaining to human resources management**, the idea being to create the right context for the inclusion of new gender-sensitive managerial procedures. The process was difficult to implement but at the end it was successful.
- ❖ **Case 2** concerns the introduction of **new protocols and guidelines to combat harassment** in the organisation. This attempt was successful but the process was characterised by conflicts, setbacks and bottlenecks.
- ❖ In **Case 3**, the team combined the need for new rules on **home working** with providing **support for women returning to work** after maternity or parental leaves, since home working is an important tool for facilitating the re-entry process.

The box below shows a case where the team, based on successful action focusing on female PhD students, succeeded in including mentoring as a permanent service offered by the institution, producing also a handbook on mentoring activities.

#### MENTORING AS A PERMANENT SERVICE OFFERED TO YOUNG RESEARCHERS

The mentoring action devised by the TRIGGER team at the Birkbeck College of London, encompassing a literature review, a longitudinal study and two subsequent programmes, all resulting in a Handbook on good practice for mentoring activities, has achieved sustainability beyond the project duration. The mentoring programme has been included in the Athena SWAN action plan for maintaining the Bronze and achieving the Silver Award of the institution as a whole. It will be thus carried on in the following three years, after the end of TRIGGER.  
See: <http://www.bbk.ac.uk/trigger/our-research/activities/mentoring-programme>



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## THE CASES

### Case 1 – CONNECTING GENDER TO HIGH-QUALITY HUMAN RESOURCES MANAGEMENT

**The starting point.** The leader of the gender equality plan at a university is a member of the President's team supervising HR policies. When the project approached its last year and the team was reflecting on future sustainability, the idea was launched to apply to the European Quality Label HRS4R. Besides being an important means to improve the management of human resources and a way to attract further European funds, the programme to obtain the label would allow for the incorporation of a series of gender equality measures already tested or proposed through the European project, which, once the label is obtained, will become operational at university level.

**The dynamics.** A first attempt to apply for the label was made at the end of the first project year. The application process was stopped by the former head of HR, who deemed it too demanding at that moment. When, two years later, the head of HR changed, the head of the project team seized the occasion to create a working group of new employees motivated to participate in the application process for the label. The process needed to be very quick, since the application procedure was going to be modified, and the team intended to apply before it happened, to avoid delays.

Thanks also to the European project, provisions concerning work-life balance (among others, the offer of sabbatical given to women researchers returning after maternity), women's careers, gender training, struggle against sexual harassment, were included. The measures identified were submitted to university staff through a questionnaire which had a good response rate among scientists and employees in a very short time. Following the results, some measures included in the programme were modified. No objections were made by the university decision councils, since the team leveraged on the possibility of getting more funding, in a moment of national financing shortage. The only opposition came from a representative of the trade unions, questioning the extra work needed to prepare the application and to comply with the requirements included in the programme.

**Some results.** The application has been accepted by the European Commission, which only requested small amendments to some measures suggested. The consultation via online questionnaire will be replicated annually in the following four years, until the EC's re-evaluation of the university's position.

### Case 2 – PROTOCOLS AND GUIDELINES AGAINST HARASSMENT

**The starting point.** In one of the universities involved in an FP7 project, protocols on workplace and sexual harassment were drawn up and negotiated with the leadership, containing procedures to deal with relevant cases, to be widely publicised throughout the university. As part of its gender action plan, the project team proposed a set of implementation guidelines.

**The dynamics.** The approval of the protocol was blocked for many months as one of the many results of the internal conflicts between trade unions representatives and university management. These conflicts arose as a consequence of the layoff of over 300 administrative staff. The layoffs were forced by the university's very difficult budgetary situation, resulting from the overall economic crisis in the country. Despite the stalled situation, the project team followed its

programme, preparing a set of guidelines, giving them a publishable format and starting to disseminate them through internal meetings with different stakeholders. In these meetings, the team and the participants realised that coordinated interventions on the problem of harassment were needed. The public presentation of the guidelines was organised on the occasion of the day on violence against women, with the participation of university authorities, national experts and multiple internal and external stakeholders.

**Some results.** Awareness of the issue was raised. The presentation was widely echoed. Finally, the protocol was approved, thus allowing the university to take charge of the problem institutionally and systematically.

### Case 3 – NEW RULES FOR HOME WORKING AND SUPPORT FOR WOMEN RETURNING TO WORK

**The starting point.** A technical university involved in an FP7 project has included a series of actions, from the very beginning of its gender action plan, which were geared towards promoting better work-life balance for women and men researchers. Among these, the promotion of home offices and the inclusion of a rule about the possibility for PhD students on parental leave to participate in an internal grant competition, with a view to facilitating re-entry.

**The dynamics.** The team succeeded in successfully negotiating the new rule concerning the participation of PhD students on maternity leave, who want to go back and continue PhD studies, in the internal grant competition. Even if seldom used at the moment, this possibility means a significant transformation of the institutional culture. As for home offices, while the technical facility was implemented in the first phases of the project, the application encountered bureaucratic

and legal problems, which required the intervention of lawyers. One of the issues dealt with concerns how to calculate and share out the costs of the overheads, mainly regarding electric power and Internet connections, between employer and employees. Changes in national legislation in the end supported the solution adopted at the university. Finally, perhaps the most important issue is related to the agreement between the employees interested in the practice and their direct heads, who definitely have the power to hinder the actual implementation of the practice, unless direct interventions are made by the academic leadership to support it.

**Some results.** In the final year of the project, important rules are already in force at the university. Their actual application in the years to come is to be sustained by the academic governance.

## 21. Inclusion of gender in an organisation's structure and mission

*Permanent positions and units devoted to gender issues and equality*

### THE ISSUE

The last strand of the sustainability process is the embedment of gender issues in an **organisation's structure and mission**.

It is not a mere formal aspect. What we already highlighted above about organisational standards is also valid here: what cannot be found in the organisational structure, or in its mission statements, is not substantially addressed by the organisation.

Thus, sustainability becomes possible when appropriate **institutional space** is created to allow gender equality to exist in the organisation's structure and mission. This explains the big effort usually made by the teams to promote the establishment of an officer, a committee, a research group, a new unit responsible for gender equality, or such like, to reinforce and back existing ones and to include gender equality among the strategic objectives pursued by the organisation.

Otherwise, gender equality efforts risk being reduced to a set of sporadic and patchy initiatives which can be terminated at any time, because not actually rooted in the organisation.

### THE PROCESS

The solutions adopted by the teams to include gender equality in the organisational structure and mission are usually extremely context-sensitive, since these solutions are highly dependent on the organisations' features and needs. Some examples are presented below.

- ❖ **Case 1** concerns the establishment of a **university-wide multi-year equality plan**, designed on the basis of the gender action plan carried out by a team under an EC-funded project. A new institutional structure was put in place, including a new commission in charge of designing the plan

and procedures allowing the team and the Board of the University to cooperate in its implementation.

- ❖ **Case 2** focuses on a successful attempt made by a team to include gender equality in the mission of the organisation, leveraging upon a **charter on gender-sensitive governance** signed by the leadership of the institution. The process was complex but fostered the adoption of various gender oriented measures in the organisation.
- ❖ In **Case 3**, the team promoted the establishment of a **senior position within the organisation** in charge of coordinating all the activities focused on gender equality. The team helped get the process going by implementing a research initiative documenting the presence of gender inequality in the institution.

A similar case is presented in the box below, concerning the appointment of a rector's delegate in charge of both gender studies and equal opportunities.

#### APPOINTING A RECTOR'S DELEGATE FOR GENDER STUDIES AND EQUAL OPPORTUNITIES

In the framework of the TRIGGER project, the team at the university of Pisa promoted the appointment of a rector's delegate on gender equality and gender studies. In the second part of the project, after the elections of the new rector, the same person was appointed pro-vice rector and reconfirmed as delegate for gender studies and equal opportunities, to strengthen both her role and the equality policy of the university.

*See:* [http://triggerproject.eu/wp-content/uploads/2014/05/Newsletter\\_2\\_final.pdf](http://triggerproject.eu/wp-content/uploads/2014/05/Newsletter_2_final.pdf)

## THE CASES

### Case 1 – GIVING A WIDER INSTITUTIONAL FRAMEWORK TO GENDER EQUALITY POLICIES

**The starting point.** Together with actions targeting specific departments, the team of a European project based in a technical university had included in its gender action plan some activities involving the whole institution, such as a review of some university regulations to make them more gender-equal and gender-sensitive. These reviews were supposed to take place at mid-term and in the final part of the project.

**The dynamics.** Following the activities conducted in the first year and their results, in particular those of the initial survey on women and men in the institution, the rector of the university decided, urged by the team, to take action, starting a multi-year institutional gender action plan. Since the project team was involved in this process, the internal regulations review was integrated in the development of the new plan as a joint initiative of the team and the Board of the University. To do this, a commission in charge of drafting a University Gender

Equality Plan, composed of different representatives from the university, was created. This new commission was co-chaired by the project team leader and the General Manager of the University. The Equality Plan was ready at the end of the second year of the project, to be subsequently approved at the beginning of the following one. In concurrence with the internal elections of the university's new management team, things slowed down. A new rector with different views on equality issues was elected. The commission for the plan was reconfigured and started to work some months later, keeping two members of the project team and maintaining most of the original draft.

**Some results.** Some changes were introduced in the initial draft of the equality plan, but the structure and most of the contents agreed upon by the first commission were kept. The final text of the Equality Plan was approved during the last project year.

## Case 2 – INSERTING GENDER EQUALITY IN ALL RELEVANT INSTITUTIONAL DOCUMENTS

**The starting point.** Based on the general assumption that each project action plan should be formulated so as to become almost immediately institutional, in the second half of its running time, a European project drafted a charter for gender-sensitive governance to be signed by the top leadership of each partner institution, as part of their commitment to gender equality at various levels. An important part of this commitment involves integrating and mainstreaming the objective of gender equality in the strategic documents of the organisations and when establishing and communicating their long-term priorities.

**The dynamics.** Following the implementation of the first part of the project, mainly thanks to the involvement of the top-level managers, one of the teams had a big success in terms of public attention from several stakeholders. Thanks to various allies found in the middle management, and despite some initial scepticism of the human resource manager and

the director of communication, various measures related to gender-sensitive communication and the fight against sexual harassment were adopted. Leveraging on this, and to ensure future sustainability, the team has been trying to intervene in all the ongoing internal processes where institutional strategies are being devised, while renegotiating and reframing relevant institutional documents.

**Some results.** Not in all cases was the effort to reframe official documents successful. As for the statute, the review of which was managed according to a top-down procedure, the team was not able to intervene. It was redrafted during the first part of the project and team members were not even invited to participate. The team succeeded, instead, in modifying some important institutional documents in a gender-sensitive way, such as the charter on student life and the agreement on work from home. Another document under renegotiation was the institution's scientific strategy.

## Case 3 – CREATING A SENIOR POSITION TO DEAL WITH GENDER INEQUALITY AT INSTITUTIONAL LEVEL

**The starting point.** One of the teams in charge of an FP7 project is based in a university having a research group interested in gender studies and a set of initiatives in place related to gender equality in different domains (scientific careers and professional work in the institution), each shouldered by working groups or committees. What was lacking, according to the project team, was a centralised form of responsibility, to respond to the challenges constantly arising in the university and to manage an institutional policy on equality.

**The dynamics.** During the first period of project activity, among others, the team implemented a research phase on the university's gender culture. The results highlighted how international academic trends impact on career routines, the differences between careers following an academic path and those following

an administrative/support/professional role, and the persistence of indirect and subtle forms of gender discriminations. These results not only led to the drafting of a set of recommendations, but also helped the research team to put forward a proposal to appoint a Pro-Vice-Rector for Equality at the university. This proposal was shared with the other groups active on gender issues in formal and informal meetings with different bodies and representatives of the institution at the university and with the leadership.

**Some results.** The proposal to appoint a new senior figure in charge of gender equality has been taken in due consideration by the leadership, even though the way to implement it is still under negotiation. Different interpretations are being given of this role and its cogency for the institution.

## Sustainability

### *Key issues*

In this section, we dwelled upon the last component of the institutional change process - **sustainability**. This notion refers to the capacity of a project to ensure that its outcomes continue after the end of external funding, which encapsulates the very meaning of "institutional change".

However, sustainability is not a mere evaluation parameter to apply after an action plan is completed. As experience shows, sustainability results from a complex process which proceeds throughout action plan implementation, and which can be in part steered by the team.

In the section, **five strands** influencing sustainability have been discussed, as they emerged from the mutual learning conducted under TRIGGER:

- ❖ **Inclusion of gender in monitoring systems** (action plan permanently introducing gender issues in the monitoring systems usually adopted by the organisation)
- ❖ **Inclusion of gender in scientific excellence** (action plan modifying the concept of scientific excellence and the practices related to it, so as to unveil its gender-biased nature and to establish a gender-aware vision of science at all levels)
- ❖ **Inclusion of gender considerations in the provision of services** (action plan ensuring services and provisions supporting women in managing their lives as a whole)
- ❖ **Inclusion of gender in organisational standards** (action plan ensuring that future gender-oriented actions hinge on existing organisational standards)
- ❖ **Inclusion of gender in an organisation's structure** (action plan ensuring that future gender-oriented actions are fully embedded in an organisation's structure).

The strands presented in this section allow us to identify some key issues in the sustainability process.

#### **Making sustainability a shared concern.**

The sustainability of an action plan is not a specific team issue, but of general interest to an organisation. An action plan which fails to become sustainable or to generate sustainable solutions is a waste of resources for both the external funding agency (if any) and the recipient organisation. This implies that any efforts made by the team to look for sustainable arrangements should be done by openly involving all stakeholders in a public and transparent discussion, clearly presenting problems, resistance, opportunities and possible solutions.

#### **Planning sustainability from the beginning.**

One of the consequences of the previous consideration is that teams should be prepared to lead the entire sustainability process by planning sustainability arrangements as early as possible, developing a sustainability plan in parallel with the action plan. As any planning process, sustainability plans are bound to be altered and even substantially modified during implementation. However, planning is helpful to continue scanning for sustainable solutions all through the duration of the action plan.

#### **Coupling sustainability with action plan quality assessment.**

Not everything in an action plan deserves to be permanently embedded in an organisation. All action plans

include actions which are planned only as starters, or may encompass initiatives which prove to be controversial, for example, or ineffective, or incapable of involving beneficiaries and stakeholders, or simply badly designed. A sustainability process should also include these aspects, which the teams probably prefer not to publicise too much. It might, however, be advisable to couple sustainability planning with a quality assessment of the different parts of the plan, so as to select the actions to promote, those that are most strategic, to ensure they continue after the completion of the action plan.

**Tailoring the approach to sustainability to the features of each action.** It is extremely infrequent that an action plan as a whole is taken on by a research organisation. However, each action can be embedded in the organisation through specific arrangements and leveraging on different stakeholders. Consequently, different approaches to sustainability should be developed, each tailored to the action or group of actions concerned. This requires the team to gain in-depth knowledge of the internal dynamics of

an organisation, to multiply negotiation efforts and to be flexible enough to modify actions appropriately when needed.

**Promoting the establishment of a new entity, or strengthening a pre-existing one, acting as management interlocutor after the end of the action plan.** In many cases, new entities (such as networks, associations, or research groups) are established under the action plans to pursue different tasks and objectives. However, these new (or revisited) entities may also be more important when the sustainability process is concerned. Actually, they may play many different roles of pivotal importance for sustainability: continue mobilising stakeholders and employees on gender issues; supporting the organisation's management to complete and develop the actions initiated under the action plan; functioning as a watchdog on gender issues; monitoring women's progress in the organisation; providing opinions on new regulations and measures which may have an impact on women's lives and careers; collecting complaints, suggestions and ideas.



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GENISLAB	<a href="http://www.genislab-fp7.eu/">http://www.genislab-fp7.eu/</a>
INTEGER	<a href="http://www.integer-tools-for-action.eu/en">http://www.integer-tools-for-action.eu/en</a> , <a href="http://www.tcd.ie/wiser/integer/">http://www.tcd.ie/wiser/integer/</a>
FESTA	<a href="http://www.festa-europa.eu/">http://www.festa-europa.eu/</a>
STAGES	<a href="http://www.projectstages.it/">http://www.projectstages.it/</a>
GENDERTIME	<a href="http://www.gendertime.org/">http://www.gendertime.org/</a>
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EGERA	<a href="http://www.egera.eu/">http://www.egera.eu/</a>
GARCIA	<a href="http://www.garciaproject.eu">http://www.garciaproject.eu</a>
TRIGGER	<a href="http://www.triggerproject.eu/">http://www.triggerproject.eu/</a>

# Appendix

## THE FIVE TRIGGER ACTION PLANS

### **UNIPI - University of Pisa**

The University of Pisa is one of the oldest and largest Italian universities, with 52,000 enrolled students and beyond 1,500 professors in 20 Departments. The percentage of women in each step of careers was in the project beginning in line with the national average (female were 52% among undergraduate students, 51% of graduate students, 42.8% of researchers, 33% of associate professors, and 15% of full professors). Despite the several differences among the various departments, the gradient of exclusion is more pronounced in the scientific field. Because of this, the actions promoted by the TRIGGER project focus on six Science and Technology Departments (in medical area and engineering). To support gender equality and gender sensitiveness at Pisa University, the action plan promotes an integrated set of actions focused on both permanent innovative institutional arrangements aimed at implementing structural changes conducive to gender equality and equal opportunities, and content-oriented initiatives, aimed at practically demonstrating the usefulness of taking into account gender priorities, points of view and peculiarities within research and innovation processes.

An articulated set of actions has been devised in the six Departments, and the active participation and support of distinguished scientists (also from other universities, thanks to the collaboration with the National Conference of Italian University of Equality Bodies) has been ensured with a view to testing innovative research procedures fully integrating the gender perspective (also sponsoring scholarship and annual dissertation awards). On the basis of the results of the tests conducted, at the end of the project a teaching module on the gendered aspects of research and on gendered research tools and procedures in the medicine area and engineering will be established.

**Website:** <http://www.unipi.it/>

### **VSCHT - University of Chemistry and Technology in Prague**

The university of Chemistry and Technology in Prague is the largest and most significant educational and research institution of its kind in the Czech Republic and also in the Central Europe. Its two-hundred-year history combines tradition with the progressive trends and modern technologies in a wide range of chemical disciplines. UCT Prague consists of four faculties, Rector's office departments and students facilities. As the recent statistics show, the number of female students has been on the rise, and this fact needs to be reflected in the university's human resources management policy. This resulted in a decision to participate in the TRIGGER project, with the aim to start addressing gender diversity and equality and transform the institutional culture. The lack of experience with gender in research led to the cooperation with gender experts from the Institute of Sociology of the Czech Academy of Sciences. Jointly, we drafted an Action Plan tailored to the needs of UCT Prague. The idea behind the action plan, which enjoys the support and active participation of the top management at the University level, is testing various tools aimed at achieving gender equality. The Faculty of Food and Biochemical Technology is a specific target for many actions, even though the project also addresses the other Faculties, particularly the Dept of Water Technology and Environmental Engineering of Faculty of Environmental Technology, and the university as a whole. A starting point toward structural change is recognising that there is no systematic overview and assessment of the situation at VSCHT and no systematic exchange of good or successful initiatives.

The action plan is geared at promoting change in several areas: providing career advice to young researchers, promoting work-life balance, activating occasions of women's empowerment, promoting communication and visibility of women scientists, promoting a gender sensitive knowledge production and management.

**Website:** <https://www.vscht.cz/>; <https://gro.vscht.cz/>

### **BBK - The Birkbeck College, University of London**

The BBK, ranked in the top 25% of UK multi-Faculty higher education institutions, is also the leading provider of part-time, evening education, serving the needs of diverse and non-traditional students. BBK consists of five Academic Schools, of which two have relevant SET components (the School of Science and the School of Business, Economics and Informatics). At BBK, even though women were well represented in the student body at the start of the project, comprising over 56% of the 17,890 enrolled students, they were underrepresented among the academic staff. This is especially higher level professors (and also among readers and senior lecturers) and even more so in SET-related disciplines. Women were also underrepresented in influential committees at College level.

Gender quality oriented policies and initiatives have been adopted over time, even if not uniformly present in all Schools and Depts. The College has been awarded Bronze level National Athena SWAN scheme (aiming to promote good practice in recruiting, retaining and promoting women in SET).

It is in this context that BBK decided to join the TRIGGER project. TRIGGER in fact, even though it promotes a completely independent and original plan of action, also represents a unique tool to support the achievement of the objectives of the Athena SWAN, while at the same time widening and deepening its scope.

The TRIGGER plan of action of Birkbeck therefore included actions impacting different sides of the gender-and-science issue, ranging from the daily working environment, the gendering of research procedures and the promotion of women's leadership in the practice, management and communication of research. It has done this through developing 'agency' among scientific women, enhancing their ability to be leaders and have co-ownership of resources.

A particularly relevant feature of the AP is its effort in supporting the commercialisation of women's research and innovation. Even though selected actions target the whole BBK, SET-related Schools (School of Science and the School of Business, Economics and Informatics) are more directly involved.

**Website:** <http://www.bbk.ac.uk/trigger/>

### **UPD – University Paris Diderot**

The University Paris Diderot is the only multidisciplinary university in Paris to offer a wide range of degrees in the Humanities, Medicine and the Sciences. Women represented at the project start 39% of teaching and research staff, 48% of the assistant professors and 26% of the full professors. As regards students, women represented 61.6% of the students and 54% of the doctoral students but only 32% of the physics students.

In 1985, UPD was one of the first French universities to establish gender studies research and teaching. In 2005, a financial support from the European Social Fund allowed to initiate some actions and, first of them, a study on women research lectures which disclosed actual gender inequality. Then, from 2007 to nowadays, campaigns promoting gender equality are permanent. A unit in charge of gender equality (Pole Égalité femmes hommes) was subsequently established in 2010.

In TRIGGER, UPD proposes a broad and comprehensive plan targeting different layers and factors of inequalities (organisational cultures and behaviours, work life balance, support to early career researchers, struggle against gender stereotypes, gendering research contents and methods, women's leadership in research, communication, management and innovation).

The plan includes about 30 actions addressing, according to their specific features, one or both of the more directly participating institutes (Physics and Biology), but often also the whole university. Among them, the creation of a permanent network of gender focal points in all the department and services of the university.

The actions encompass regular collection and analysis of statistics, qualitative research in the concerned departments to target further actions, training courses addressing different audiences among students and employees, promotion of new rules, raising awareness and communication, including the organisation of international conferences.

**PEFH Website:** <https://universite.univ-paris-diderot.fr/une-universite-engagee/egalite-femmes-hommes>  
video on TRIGGER project: <https://diderot-tv.univ-paris-diderot.fr/videos/le-projet-trigger>

### **UPM – Technical University of Madrid**

The Technical University of Madrid is the largest Spanish technological university. More than 2,400 researchers carry out their activity at the UPM, grouped in 200 Research Groups, 22 Research Centres or Institutes and 55 Laboratories.

At the project start, at UPM women accounted for around 33% and 34% of undergraduate and graduate students respectively. Among professors (all categories), women accounted for 23%. The presence of women was particularly low among full professors (7.9%) and higher in the group of adjunct professors (44.8%).

The Action Plan for UPM promotes an integrated set of actions aimed at launching structural-level change at the University, to be later incorporated in and made permanent through the Equality Action Plan that UPM has to draft and implement following Spanish normative requirements. The TRIGGER project thus also concretely support the existing Equality Unit, which is part of its Board. The actions, addressing many problem areas relevant to gender equality, are mostly targeting the whole University, even though three Schools (School of Architecture/ETSAM; School of Building Engineering/ETSEM; School of Industrial Engineering/ETSII) are – even if to a different extent – the forerunners, both in the planning and implementation of activities targeting all Faculties and Schools, and in the testing of additional ones, specific to their characteristics and previous experience.

Among the many actions geared at promoting a women-friendly environment (changing behaviours and culture, supporting work-life balance, sustaining early career researchers), a gender-aware science and technology (struggle against stereotypes and insertion of gendered methodologies and contents) and the emerging of a women's leadership in research, innovation, management and communication, it is to highlight the successful creation of a Chair in Gender, Innovation and Sustainability and the intense national and international networking activity.

**Website:** <https://triggerprojectupm.wordpress.com/>

## SISTER PROJECTS TITLES AND PARTNER

### **GENIS LAB (The Gender in Science and Technology LAB)**

(2011-2014) (SiS-2010-2.1.1.1 – Grant agreement n° 266636)

#### Project partners:

Fondazione Giacomo Brodolini, project coordinator (IT)  
Spanish Superior Council for Scientific Research) - Institute for Polymer Science and Technology (ES)  
Leibniz-Institut für Polymerforschung Dresden e.V., (DE)  
Faculty of Technology and Metallurgy, University of Belgrade (RS)  
National Institute of Chemistry (SI)  
National Institute for Nuclear Physics (IT)  
Blekinge Institute of Technology (SE)  
International Training Centre of the International Labour Organization (Gender Unit), UN Agency  
Associazione Donne e Scienza (Italian women in science organization) (IT)

### **INTEGER (INstitutional Transformation for Effecting Gender Equality in Research)**

(2011-2015) (SiS-2010-2.1.1.1 – Grant agreement n°266638)

#### Project partners:

Centre National de la Recherche Scientifique, project coordinator (FR)  
Trinity College Dublin (IE)  
Šiauliai University (LT)  
GESIS-Leibniz Institute for the Social Sciences (DE)

### **STAGES (Structural Transformation to Achieve Gender Equality in Science)**

(2012-2015) (SiS 2011 2.1.1-1 – Grant agreement n°289051)

#### Project partners:

Dipartimento per le Pari Opportunità della Presidenza del Consiglio dei Ministri, project coordinator (IT)  
ASDO (IT)  
Università degli Studi di Milano (IT)  
Fraunhofer Gesellschaft zur Förderung der angewandten Forschung. V. (DE)  
Aarhus Universitet (DK)  
Universitatea Alexandru Ioan Cuza, Iași (RO)  
Radboud Universiteit, Nijmegen (NL)

### **FESTA (Female Empowerment in Science and Technology Academia)**

(2012-2017) (SiS 2011 2.1.1-1 – Grant agreement n°287526)

#### Project partners

Uppsala University, Project coordinator (SE)  
University of Southern Denmark (DK)  
RWTH Aachen University (DE)  
University Of Limerick (IE)  
Fondazione Bruno Kessler (IT)  
Istanbul Teknik Universitesi (TR)  
South-West University (BG)

### **GENDERTIME (Transferring Implementing Monitoring Equality)**

(2013-2016) (SiS 2012 2.1.1-1 – Grant agreement n° 321378)

#### Project partners:

Egalité des Chances dans les Etudes et la Profession d'ingénieur en Europe, Project coordinator (FR)  
Inter-University Research Centre for Technology, Work and Culture (AT)  
The University of Padua (IT)  
Linköping University (SE)  
University Paris Est Créteil (FR)  
Mihailo Pupin Institute (RS)  
Bergische Universität Wuppertal (DE)  
Loughborough University (UK)  
Tecnalia Research & Innovation (ES)  
Donau-Universität Krems (AT)  
University of Gothenburg (SE)

**GENOVATE (Transforming organisational culture for gender equality in research and innovation)**

(2013-2016) (SiS 2012 2.1.1-1 – Grant agreement n° 321378)

Project partners:

University of Bradford, project coordinator (UK)

University College Cork (IE)

Luleå University of Technology (SE)

Ankara University (TK)

Università degli Studi di Napoli Federico II (IT)

Trnava University in Trnava (SK)

Universidad Complutense de Madrid (ES)

**GARCIA (Gendering the Academy and Research: combating Career Instability and Asymmetries)**

(2014-2016) SiS.2013.2.1.1-1 – Grant agreement n° 611737.

Project partners:

University of Trento, project coordinator (IT)

Université catholique de Louvain (BE)

Radboud University Nijmegen (NL)

University of Iceland (IS)

University of Lausanne (CH)

Research Centre of the Slovenian Academy of Sciences and Arts (SI)

Joanneum Research Forschungsgesellschaft (AT)

**EGERA (Effective Gender Equality in Research and the Academia)**

(2014-2017) SiS.2013.2.1.1-1 – Grant agreement n°

Project partners:

Fondation nationale des sciences politiques, project coordinator (FR)

Universitat Autònoma de Barcelona (ES)

Radboud University Nijmegen (NL)

Middle East Technical University (TR)

University of Antwerp (BE)

University of Vechta (DE)

Centrum Vyzkumu Globalni Zmeny AV CR v.v.i. (CZ)

Centro de Estudos para a Intervenção Social (PO)