



GOING BEYOND THE FORMAL ADOPTION OF A GENDER EQUALITY PLAN

GUIDE FOR UNIVERSITIES

SERBIA

TARGET } Taking a Reflexive approach
to Gender Equality for
institutional Transformation

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Executive Summary

The aim of this guide is to support universities that are willing to develop and implement a Gender Equality Plan (GEP). It is based on the approach and lessons learned from the Horizon 2020 TARGET project ‘Taking a Reflexive Approach to Gender Equality for Institutional Transformation’.

Experiences from TARGET show that research institutions may be pioneers – despite a lack of national policies and concrete measures to support gender equality – if they are motivated, involve key institutional actors, dedicate resources and rely on gender competence. These experiences have also shown enormous potential to influence national discourse on gender equality in their countries. It is not only funding or accreditation agencies that can elicit change: a pioneering university may also boost change in other universities and research organisations.

The new GEP eligibility requirement of Horizon Europe can be a key driver for motivating universities to adopt a gender equality policy – but it also entails the risk that GEPs are seen as just another administrative requirement. This guide aims to support universities to go beyond a merely formal adoption of a GEP and is especially addressed to ‘change agents’: individuals or groups who are aware of existing gender inequalities in their institutions and are willing to counteract them. The change agent acts as a catalyst for gaining top-management commitment and initiating a structural process towards gender equality.

Actual change towards gender equality is the result of increased institutional willingness and capacity to identify, reflect on and address gender bias in a sustained way. Gender equality is a matter of social justice and there is extensive evidence that it improves the quality and impact of higher education, research and innovation.

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Abbreviations

CoP: Community of Practice

HR: Human Resources

ERA: European Research Area

RFO: Research Funding Organisation

GEA: Gender Equality Audit

R&I: Research and Innovation

GEP: Gender Equality Plan

RPO: Research Performing Organisation

Introduction

This guide supports universities that are willing to develop and implement a Gender Equality Plan (GEP). It is based on the approach and lessons learned from the Horizon 2020 TARGET project ‘Taking a Reflexive Approach to Gender Equality for Institutional Transformation’.

There is a wealth of resources for guidance on GEPs in research and academia. The Horizon Guidance on Gender Equality Plans¹ and the GEAR² tool developed by EIGE are the main references at the EU level. Other useful guidelines and tools have been developed by EU-funded projects, national bodies and research institutions in European countries and beyond.

This guide intends to provide additional guidance building on the experience of TARGET. From 2017 to 2021, TARGET supported seven institutions in the design and implementation of a reflexive gender equality policy: two research funding organisations (Fondazione Regionale per la Ricerca Biomedica, FRRB, Italy; **Research Innovation** Foundation, RIF, Cyprus), one accreditation agency (National Agency for Quality Assurance in Higher Education, ARACIS, Romania), one research institution (Hellenic Foundation of European and Foreign Policy, ELIAMEP, Greece), two universities (University of Belgrade, UB, Serbia; Université Hassan II Casablanca, UH2C, Morocco), and a network of engineering schools in the Mediterranean basin (Réseau Méditerranéen des Ecoles d’Ingénieurs, RMEI). Fondazione Giacomo Brodolini (FGB, Italy) and NOTUS (Spain) acted as supporting partners while the Institute for Advanced Studies (IHS, Austria) was the coordinator and evaluator.

The seven implementing institutions had very little experience with gender issues and are located in countries with limited policies for gender equality in higher education, research and innovation. The process of audit, design, implementation, monitoring and evaluation of their first GEP was conceived as the start of a long-term journey providing a framework for engaging different institutional actors in a reflexive and evidence-based process of structural change.

It is widely acknowledged that an institution’s willingness to develop and implement a GEP depends to a large extent on external incentives or pressure: legal frameworks, policies and initiatives adopted by governmental bodies, funding agencies and other organisations. Nonetheless, the experiences of TARGET show that institutions can also be pioneers even where there is a lack of national policies and concrete measures to support gender equality – if they are motivated, involve key institutional actors, dedicate resources and rely on gender competence. These experiences have also shown the enormous potential for influencing the national discourse on gender equality in their respective countries. It is not only funding or accreditation agencies that can elicit change: a pioneering university may also boost change in other universities and research organisations.

The new GEP eligibility requirement of Horizon Europe (Box 1) can be a key driver for motivating universities to adopt a gender

1 EC, 2021.

2 Further information available at: <https://eige.europa.eu/gender-mainstreaming/toolkits/gear>

equality policy – but it also entails the risk that GEPs are seen as just another administrative requirement. This guide aims to support universities to go beyond a merely formal adoption of a GEP. As such, it is especially addressed to ‘change agents’: individuals or groups who are aware of existing gender inequalities in the institution and are willing to counteract them. Change agents act as a catalyst for strengthening top-management commitment and initiating a structural process towards gender equality.

We assume there is no one-size-fits-all solution. GEPs can be successful in achieving their desired effects only if they are context-sensitive, tailored to the specific organisational needs of the institution, and embedded in a framework that supports engagement and reflexivity of different institutional actors. Actual change is the result of increased institutional willingness and capacity to identify, reflect on and address gender bias in a sustained way.

We do hope this guide is useful for this purpose.

Box 1. Horizon Europe GEP eligibility criterion

To be eligible, legal entities from Member States and Associated Countries that are public bodies, research organisations or higher education establishments (including private research organisations and higher education establishments) must have a gender equality plan, covering the following minimum process-related requirements:

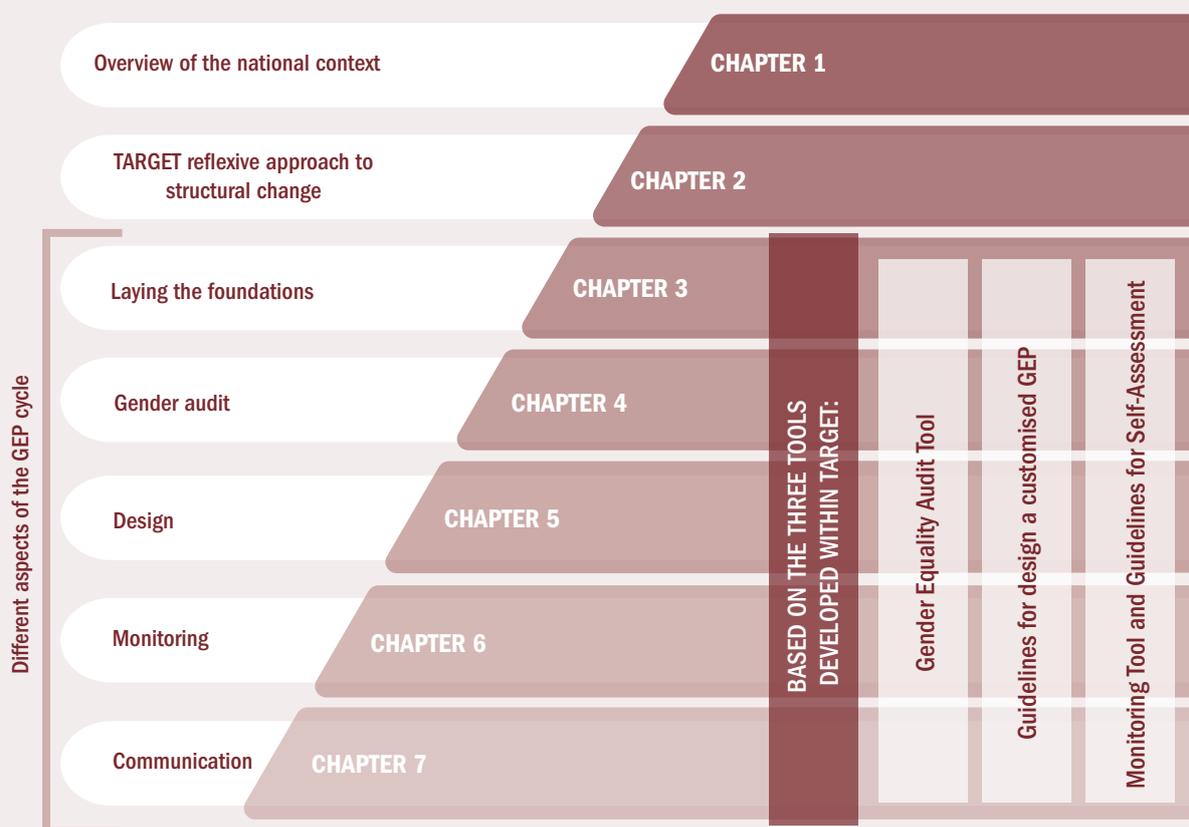
- » **publication:** a formal document published on the institution’s website and signed by the top management;
- » **dedicated resources:** commitment of resources and expertise in gender equality to implement the plan;
- » **data collection and monitoring:** sex/gender disaggregated data on personnel (and students, for the establishments concerned) and annual reporting based on indicators;
- » **training:** awareness raising/training on gender equality and unconscious gender biases for staff and decision-makers.

Content-wise, it is recommended that the gender equality plan addresses the following areas, using concrete measures and targets:

- » **work-life balance and organisational culture;**
- » gender balance in **leadership and decision-making;**
- » gender equality in **recruitment and career progression;**
- » integration of the **gender dimension** into research and teaching content;
- » measures against **gender-based violence**, including sexual harassment.

Structure of the guide

The guide is structured in seven chapters. The first chapter provides an overview of the national context, with a focus on gender equality policies in higher education, research and innovation. The second chapter presents the TARGET reflexive approach to structural change. The next five chapters focus on different aspects of the GEP cycle: laying the foundations, gender audit, design, monitoring and communication. They are based on the three tools developed within TARGET, all available via www.gendertarget.eu: Gender Equality Audit Tool³, Guidelines for design a customised GEP⁴ and Monitoring Tool and Guidelines for Self-Assessment⁵. The guide also builds on the book elaborated by TARGET partners on our experiences in the design and implementation of a reflexive gender equality policy⁶.



3 Chizzola, De Micheli & Vingelli, 2018.

4 Palmén & Caprile, 2018.

5 Wroblewski & Eckstein, 2018.

6 Wroblewski & Palmén, eds., forthcoming.

1. National context

In Serbia, the Constitution of 2006 guarantees the equality of women and men and obliges the state to develop an equal opportunities policy. Since then, important laws have been issued, namely the Law on the Prohibition of Discrimination, the Law on Equality Between the Sexes and the Law on the Protection of Citizens. The Budget System Law, passed in December 2015, also envisions gender-responsive budgeting at all levels. With regard to gender violence, the Criminal Code and the Law on Preventing Domestic Violence were adopted in June 2017 and introduced urgent protective measures. The new Law on Gender Equality that was withdrawn after the first draft in 2015 was finally adopted in April 2021 together with the Strategy for Preventing and Combatting Gender-based Violence Against Women and Domestic Violence for the period from 2021–2025.

In 2013, a total of 21,044 people were employed in research and development in Serbia. At 51%, the proportion of women in this area was above that of the EU-28 average (25%)⁷. According to the Progress ERA Report⁸, 55% of PhD graduates in Serbia are female, which is also well above the EU-28 average of 48%. The annual increases were close to 7% and thus more than 6% above the EU-28 trend. The European Commission could not calculate the proportion of women in Grade A positions in the higher education system⁹. However, with regard to the inclusion of the gender dimension in the research content, Serbia is below the EU-28 average. The annual drop in scores averages (17%) means that Serbia has lagged even further behind the other Member States since the last ERA monitoring in 2016.

Serbia formulated in 2016 the Strategy on Scientific and Technological Development of the Republic of Serbia for the period 2016–2020 – Research for Innovation¹⁰. It is partly based on the Strategy on Scientific and Technological Development for the period 2010–2015 and other strategic documents at both the Serbian and EU level. The strategy is a national road map for integration into the European Research Area (ERA). The strategy states that science should be based on a competitive system that supports outstanding scientific achievements and their significance for economic development, the competitiveness of the Serbian economy and the development of society as a whole¹¹. The overarching goal is economic growth, social and cultural progress, and an increase in living standards and quality of life¹². The efficiency and effectiveness of the scientific research system should create new knowledge and technologies and solve complex social and economic problems. Therefore, highly qualified research staff should be trained. The strategy defines six specific goals:

7 MPN, 2016.

8 EC, 2019.

9 EC, 2019.

10 MPN, 2016.

11 MPN, 2016, p.2.

12 MPN, 2016, p.2.

1. Encouraging excellence and relevance of scientific research in the Republic of Serbia.
2. Strengthening the connection between science, economy and society to encourage innovation.
3. Establishing an effective management system for science and innovation in the Republic of Serbia.
4. Ensuring excellence and the availability of human resources for science, economy and social affairs.
5. Improving international cooperation in the field of science and innovation.
6. Increasing investment in research and development through public funding.
7. Encouraging the investments of the business sector in research and development.

One measure to achieve the sixth objective is gender-related: 'Gender and minority equality will be improved at all levels of decision-making and gender budgeting will be implemented in accordance with the Gender Budgeting Guidelines at the national level in the Republic of Serbia'. The relevant performance indicators are the percentage of gender representation at different decision-making levels and the proportion of women in the total number of researchers. Apart from that, no further mention is made of gender or women's issues.

The University of Belgrade, the oldest and biggest university in the country, formulated its first GEP in the framework of TARGET. Among other aspects, the GEP includes the establishment of a Gender Equality Committee and the adoption of the first anti-sexual harassment policy at the university level – 'Rulebook on the prevention of and protection from sexual harassment at the University of Belgrade'.

2. TARGET approach to GEP development and implementation

TARGET adopts a three-dimensional objective for gender equality in higher education, research and innovation based on the three priority areas of intervention defined by the European Research Area (ERA)¹³:

1. removing gender-related institutional barriers to career development
2. tackling gender imbalances and gender bias in decision making
3. integrating the gender dimension in teaching, research and innovation content.

TARGET takes a reflexive approach that goes beyond the formal adoption of a GEP by emphasising an iterative reflection on progress and establishing a community of practice to effect structural change.

In this section we present the basic concepts of the TARGET approach.

Gender equality and structural change

Gender equality has long been recognised as a matter of social justice. It is a fundamental human right, one of the United Nation's Sustainable Development Goals and a founding value of the European Union. There is increasing evidence that advancing gender equality in higher education, research and innovation has positive impacts for individuals, research organisations and society at large.

Gender equality¹⁴:

- + Creates better education and working environments which help to attract, retain and maximise talent.
- + Improves the quality and impact of higher education, research and innovation by ensuring it is relevant to the needs, expectations and values of the whole of society.

Universities and academia in general are characterised by persistent gender imbalances. Women are under-represented in the highest management and academic positions and many research fields continue to be either male- or female-dominated¹⁵. However, gender equality goes beyond the equal representation of women and men in all disciplines and hierarchical levels:

¹³ EC, 2012b.

¹⁴ EC, 2021.

¹⁵ UNESCO-IESALC, 2021; EC, 2020b.

- + It entails removing **structural barriers** for career's advancement. These barriers rely on a concept of 'the excellent scientist', which is based on an outdated typical male career of early achievement and complete devotion to academia, free of any other obligations. This concept has gendered implications for the definition of merit and the criteria for recruitment and promotion. It impacts negatively on all groups which do not fit with the model of excellent scientist, for instance people with care responsibilities or health issues¹⁶.
- + Furthermore, **unconscious gender bias** is pervasive in society and academia is not an exception. It is based on unintentional association to traditional gender norms, values and stereotypes which impact negatively on the recognition of women's work and potential¹⁷.
- + Overt forms of discrimination can also be present and there is increasing evidence of **gender-based violence**, including sexual harassment in universities¹⁸.
- + Knowledge and technological development are most often assumed to be gender-neutral. Yet neglecting **sex and gender analysis** leads to cognitive errors, wasted opportunities for research and innovation, and reinforces gender inequalities in society¹⁹.
- + In addition, gender inequalities intersect with other forms of discrimination, based on, for example: social origin; religion; ethnicity, migrant background; sexual orientation; gender identity; age; care responsibilities; health issues. This **intersectional** understanding of gender has implications for both organisational practices and the content of teaching, research and innovation²⁰.
- + **Gender competence in decision-making** is a pivotal factor for tackling all these issues at the institutional level²¹.

Advancing gender equality in higher education, research and innovation requires a long-term, sustained structural change process aimed at building an institutional environment (values, norms, structures and procedures) in which gender equality is widely discussed and explicitly embraced in organisational and individuals' practices²².

16 For example: EC, 2004; Van den Brink, 2010.

17 For example: Science Europe, 2017.

18 Bondestam & Lundkvist, 2020.

19 Schiebinger, 2008; EC, 2020b.

20 For example: Woods et al, 2021; EC, 2020a.

21 For example: Lipinsky & Wroblewski, 2021.

22 EC, 2012a; 2021.

Reflexivity and structural change

Gender equality work is not an easy task in any organisation.

“*The gender problematic is not a simple problem, but a messy one, or a wicked one, or simply a political one, meaning that there is no real consensus about what the problem is exactly, about why and for whom it is a problem, about who is responsible for the existence of the problem, who is responsible for solving it. This means that there is an ongoing political power struggle over these definitions.*”²³

TARGET considers that **individual and institutional reflexivity** is at the core of structural change²⁴. The GEP should provide a framework for relevant stakeholders to reflect on organisational practices, identify gender bias and take agency by developing alternative, non-gendered practices and tackling resistance. The GEP is conceived as an organisational learning process, based on empirical evidence and open and critical discussion of developments towards gender equality. This process builds institutional commitment, gender competence, and consensus around priorities for action. It provides the basis for a context-sensitive GEP, tailored to the specific needs of the organisation.

Furthermore, TARGET argues that change in universities is especially complex²⁵. Universities are not only highly gendered organisations²⁶ they also follow two different logics when it comes to gender equality²⁷: an **academic logic** (as part of the academia) and an **organisational logic** (as any organisation does). Gender plays a different role in each of these logics. For instance, a positive action measure to promote qualified women may be accepted in the organisational logic, but might be fiercely contested in the academic logic, where merit is assumed to be gender-neutral. These two different logics also entail different power structures. Top management (rectorate, deans) have decision making power regarding strategy and resources, but decision making in academic matters is assigned to the highest scientific positions (full professors, academic boards). These power structures exist in parallel and stay in most cases unconnected alongside each other. For this reason, we think that it is not only necessary to include top management in the GEP but also stakeholders representing the academic logic. A GEP should provide room for reflexivity to link these two different logics and address gendered practices in a consistent way.

Theory of change and empirical evidence

A theory of change approach enables reflexivity to be integrated into the GEP process. A theory of change is ‘an outcomes-based approach which applies critical thinking to the design, implementation and evaluation of initiatives and programmes

23 Verloo, 2001, pp. 14-15.

24 Wroblewski, 2015; Martin, 2006.

25 Wroblewski & Palmén, forthcoming.

26 Acker, 1990.

27 Heintz, 2018.

intended to support change in their contexts²⁸. It entails carrying out an initial audit to map the relevant context for the initiative, the current state of the problem that the intervention aims to tackle as well as the relevant actors. Based on this audit, the long-term change that the initiative aspires to foster is defined through the development of visions, objectives, and targets. Actions, accompanied by expected outcomes and impacts are then specified. The theory of change approach requires the elaboration of a process or sequence of change that spells out the path to the desired long-term outcome, as well as explicitly formulated assumptions about how this change might happen.

Vogel²⁹ emphasises that the quality of a theory of change process rests on **'making assumptions explicit'** and making strategic thinking realistic and transparent. A theory of change entails a deep reflexive process where assumptions of change, linked to the programme, are made explicit. Articulating assumptions is the main part of developing a theory of change. Assumptions are those premises that programme interventions are implicitly based on yet have not been proven by evidence. Using evidence to identify, check and challenge these key assumptions and map the implicit and explicit linkages of the intervention (input, output, outcome, impact and context) forms part of developing a theory of change. In this process, **critical thinking** is cross-checked with **qualitative and quantitative evidence** – and the different insights stemming from stakeholders' contextual knowledge. Building on the audit, regular monitoring provides the basis for sustained institutional reflexivity.

A community of practice approach

A key element of the TARGET approach is the establishment of a community of practice in the institution³⁰. Experiences have shown that it is difficult to initiate structural change if it relies on just one person or a small group with little leverage on the organisation. The notion of a community of practice (CoP) was coined by Wenger³¹ and is composed of three main elements: shared interest and commitment on a domain of practice (domain), mutual engagement (community), and development of a shared repertoire of resources (practice)³². In TARGET, the **domain** is the development and implementation of a GEP. The **community** is made of the group of people who interact through activities, discussions and meetings, engage in mutual learning and support GEP development and implementation. The **practice** refers to the development of gender competence driven by 'experiential knowledge' which enables members of the CoP to identify institutional gendered practices, develop non-gendered alternatives and tackle resistance. The TARGET approach conceives the CoP as a key aspect for strengthening individual and institutional reflexivity by linking the different stages of GEP development to discussions in the CoP. A crucial aspect is that the CoP involves representatives from both the organisational and the academic logics (management and professors).

28 Vogel, 2012, p. 3.

29 Vogel, 2012.

30 Palmén & Caprile, forthcoming.

31 Wenger, 1998.

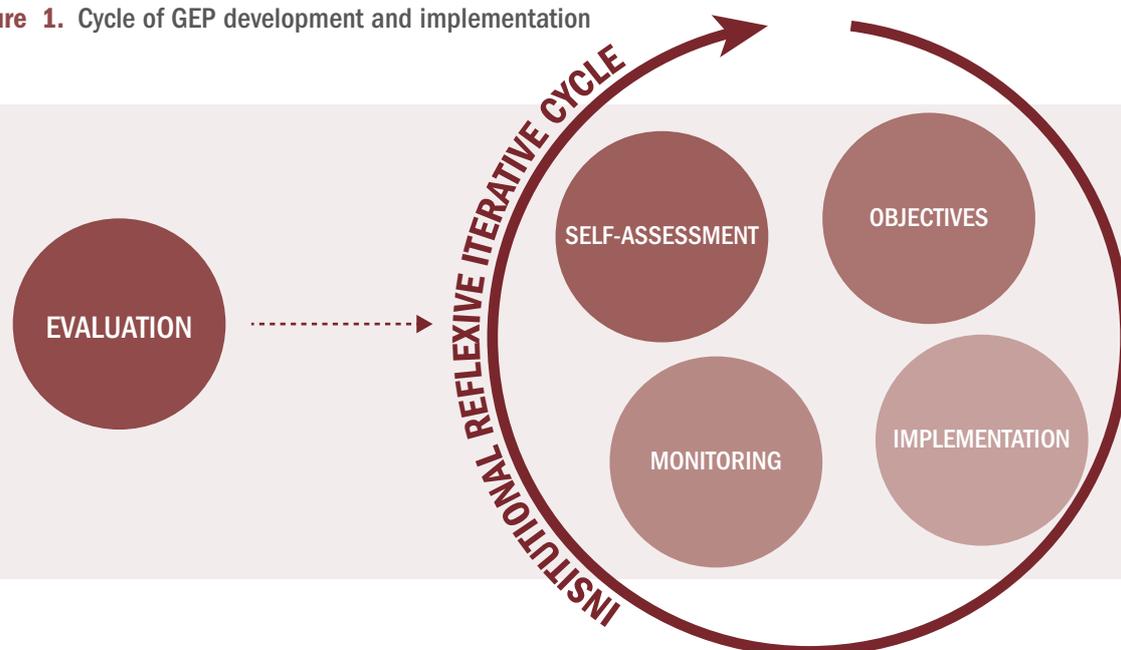
32 Wenger-Trayner & Wenger-Trayner, 2015.

A cyclical, sustained process

The approach to GEP developed within the TARGET project refers to the concepts discussed above: structural change, reflexivity, dual logic of universities, theory of change, and community of practice.

The process of GEP development and implementation follows a complete **policy cycle** (Figure 1). The process starts with an empirical analysis of the status quo regarding gender equality and the institutional context (audit). Based on audit results gender equality priorities and objectives are formulated. Concrete measures to pursue these objectives are developed, implemented and monitored. The monitoring process aims to describe any changes in the relevant context and status quo of gender equality as well as the implementation of concrete gender equality measures. Ideally the process is completed by an external evaluation of the GEP. Based on the monitoring (and evaluation when available) concrete measures are adapted if necessary or a new GEP is developed.

Figure 1. Cycle of GEP development and implementation



In this process, resistance may take many forms, appear at different stages, and come from different actors. Resistance to change is typically strong when an organisation's cultural norms, beliefs, attitudes, and values are the target of change efforts³³. This is obviously the case of structural change in universities as it challenges deeply engrained gendered practices. Resistance to change can be intentional and 'explicit' or subtle and 'implicit'. It can be active or take the form of 'non-action' – thereby reinforcing the status-quo by merely doing nothing to further gender equality. A comprehensive overview of resistances within research institutions and strategies to overcome them can be found in the FESTA Handbook on Resistances³⁴.

We argue that resistance to change in the universities may be especially strong in the academic logic, where gender issues

³³ Benshop & Verloo, 2011, p. 286.

³⁴ FESTA, 2016.

may be seen as a threat to an alleged gender-neutral meritocratic system and there is denial of the significance of the gender dimension in education and research content. In TARGET, the development and implementation of a reflexive GEP is conceived as an iterative, cyclical and sustained process of which addressing resistance is an inherent part.

The GEP cycle should provide a framework where:

- + The dual scientific and organisational logics (and subsequent practices) can be mediated.
- + Continuous reflexivity is supported by a theory of change and regular monitoring.
- + Gender competence can be strengthened by combining and reconfiguring different types of knowledge and practical expertise in the fields of gender and organisational change.
- + Resistance to gender equality interventions can be identified and successfully tackled; this sometimes leads to improvements in the quality of interventions by reformulating objectives or redesigning concrete measures.

3. Laying the foundations

Formal commitment of top management is a pre-requisite for developing a GEP. Without the support of the management level and the willingness to initiate a process of organisational change, a gender equality plan cannot be successfully developed and implemented.

The change agent has to secure this formal commitment and have a clear mandate to initiate the process. This includes also the provision of the necessary resources (human and financial) for developing the audit and designing the GEP. In terms of human resources, it is crucial to include gender and organisational change experts and the skills to facilitate the process of developing a GEP. If there is no possibility to count on such expertise with internal staff, external experts should be engaged.

Besides, the development of a GEP requires the involvement of all relevant stakeholders. This is necessary to ensure their practical commitment and readiness to participate in the structural change process.

To ascertain commitment from institutional key stakeholder groups, and to involve them from the outset of the process, the participatory TARGET approach focuses on two core elements:

- + Gaining commitment from top tier and upper-level management and research staff.
- + Creating a community of practice that involves representatives of all staff layers of the institution.

3.1. Commitment and involvement from top and senior management

While top management of the university may express formal commitment to implement a GEP, it will be necessary to consolidate this commitment, to operationalise it at a practical level and, importantly, to extend it to the upper and senior hierarchy levels, both in management and academic matters (for example, Deans, Academic Boards, Heads of Department)³⁵.

Practical suggestions for consolidating and strengthening commitment at the upper and highest organisational levels of the university:

- + Present arguments that link the priorities of the university in the areas of human resources, communication, external recognition and funding to gender equality related issues and show how these priorities could be supported by the introduction of gender equality policies (for example, improving working conditions and attract and retain talent; media presence and positive image building, gain in legitimacy at EU and international levels; access to Horizon Europe

35 Chizzola, De Micheli & Vingelli, 2018.

funding).

- + Present arguments that link the priorities for education and R&I to the adoption of a gender dimension by enhancing the quality of education and research, potential for innovation and responsiveness towards the needs of the whole society.
- + Foster an active participation of members of top and upper-level management in institutional activities such as workshops, dissemination and communication activities. This gives visibility to key personnel in top tiers of management in institutional GEA-related activities, thus adding to the perceived legitimacy of the gender audit activities.
- + Make sure that the top and upper-level management commits to playing a central role in the GEA communication strategy. For instance, it should be the rector or a senior manager who announces the audit, the goals of developing a GEP, and the expected institutional opportunities and benefits.

Strong and explicit commitment of the top and senior management is crucial for legitimising the time and effort that will have to be invested by the university's staff to implement the audit, for authorising information flows and for addressing problems that may arise at this initial stage. It increases the visibility and perceived legitimacy of the audit process, and facilitates the procedures for collecting relevant data. Participation of top and senior management is equally important in the next steps of the process – that is the design and monitoring of the GEP.

3.2. Creating a community of practice

The establishment of a community of practice that involves key institutional stakeholders is crucial for building up the institutional capacity for a reflexive gender equality policy. It is important to create this community since the onset. Mobilising different actors ensures that the audit does not depend only on the change agent and enriches the collection and analysis of data³⁶.

How to identify the relevant stakeholders? It is important to keep in mind that members of the community of practice **should not be expected to have specific expertise in gender equality**. The main criterion for selecting members should be their function in the organisation and their interest to be involved in the process. The community of practice should involve strategically important figures representing the dual logics of the university (academic and organisational), including administration staff who have access to institutional documents and statistics relevant to the implementation of the audit and further monitoring.

Potential participants might be:

- + Management and members of decision-making bodies.
- + Members of academic boards and strategic research groups.
- + Professionals of administrative departments (human resources, budget, statistics).

36 Chizzola, De Micheli & Vingelli, 2018.

- + Gender scholars; organisational change scholars.
- + Staff representatives (administrative and teaching/research staff) of different hierarchical levels (including work council).
- + Representatives from civil society organisations (for instance, feminist or women researchers' associations).
- + Representatives from student organisations.

When contacting potential members of the community of practice the goals of and the possible benefits deriving from implementing a GEP should be highlighted. It is also necessary to specify, at least in a preliminary way, the kind of input they may provide and the audit activities in which they could be involved, according to their function in the institution.

The task of identifying and involving stakeholders should be seen as an iterative process to be continued throughout the whole GEP implementation cycle. As this process goes on, it is likely that you will be able to find new stakeholders as sources for input and collaboration (while maybe former members of the CoP leave it or play a less active role); and you may also notice the need to adjust and adapt the responsibilities and tasks of those already involved in the CoP.

The community of practice as a whole usually meets regularly in order to discuss the current status of the development or implementation of the equality plan. The working dynamic of the community of practice may vary to a great extent: from a few very formal and lengthy meetings to more informal, shorter meetings at closer intervals. Another option is to link the meetings of the community of practice to other institutional meetings and working procedures. Whatever the meeting modality, the key issue is that meetings should enable the central function of the community of practice, which is to establish a common understanding of gender equality in the institution among the relevant stakeholders. Therefore, in addition to the task-specific involvement of specific stakeholders, it is important to ensure a joint discussion that also involves representatives of the management.

Regular interaction and joint work among members of the community of practice enables to **build and strengthen gender competence** by combining and reconfiguring different types of knowledge and practice on gender and organisational change. For instance, a gender scholar can have a deep theoretical understanding of gender equality, but little expertise in implementing gender equality policies, in contrast to practitioners in the field of gender equality and organisational change. A statistician may develop gender competence in the course of the process by critical reflection on how to collect and build relevant gender indicators. The same holds true for a financial professional who develops specific procedures to collect relevant data for gender -budgeting. The overall result is that all members of the community of practice learn from others and develop jointly '**experiential knowledge**'³⁷.

37 Palmén & Caprile, forthcoming.

4. Gender equality audit

The aim of the audit is to analyse the current situation or status quo of the university in terms of gender equality in order to identify specific gender equality challenges. The audit is based on the analysis of available data (documents, administrative records, databases) complemented by qualitative interviews and additional methods where possible (in particular, surveys for staff and students).

It is important to stress that a successful gender equality audit requires the development of an effective communication strategy tailored to the specific national context and institutional setting of the university. The university staff need to understand why they are being asked to participate in the gender audit process, the value of conducting the gender audit, and what the gains and benefits are that may result from the gender audit, both at organisational and individual levels. Moreover, a clear and realistic timeline detailing each step of the audit process should be communicated to the organisation's staff.

4.1. Institutional structure and context

Each university is a unique organisational entity with a specific internal structure and external context. The aim of the first step of the audit is to collect background information about the national and local context, provide a general description of the university (objectives, decision-making bodies, institutions, structures, core processes, size) and carry out an initial assessment of two main aspects: 1) level of institutional awareness concerning gender equality issues; 2) availability of sex-disaggregated and other gender-relevant data³⁸.

Institutional gender equality awareness

The assessment of institutional gender equality awareness relies on the analysis of core organisational documents, internal and external communications, and institutional self-presentations. There are several **key qualitative questions** to assess the level of institutional awareness:

- + What are the key institutional documents of the university? To what extent are gender issues mainstreamed within these institutional documents?
- + Does the organisation have an ethics code or code of conduct? If so, does it specifically include gender equality as a key component?
- + What are the key internal and external modes of communication (website, newsletter, etc.)? To what extent are gender issues mainstreamed within these modes?

38 Chizzola, De Micheli & Vingelli, 2018.

- + Has the university received the HR Excellence in Research Award³⁹?
- + Has the university adopted any rules concerning gender-sensitive language? Has the university adopted any rules about gender-sensitive images?
- + Has the university adopted a work-life balance policy? If so, is this policy aimed at fostering equal sharing of caring responsibilities between women and men?
- + Has the university adopted a policy aimed at preventing gender-based violence, including sexual harassment?
- + What are the main national and local policies in higher education, research and innovation? Are there specific policies to promote gender equality? If so, are there specific measures to support GEP implementation?
- + Is the university in line with the national level of gender awareness, as defined in national gender equality legislation and national gender equality policies in higher education, research and innovation?

Gender-relevant data

Sex-disaggregated data are essential to analyse gender imbalances in institutions. As a first step of the audit, it is of utmost importance to ascertain what kind of sex-disaggregated data are already available from the administrative records of staff and students, who collects them and for what purpose. At a very basic level, this step seeks to identify whether the university collects sex-disaggregated data for:

- + Staff, broken down by function (management, administration, education and research)
- + Decision-making bodies (including commissions for recruitment and promotion)
- + Education and research staff, broken down by discipline and hierarchical level
- + Remuneration of staff, broken down by function (management, administration, education and research), hierarchical level and discipline (when relevant)
- + Students and graduates, broken down by discipline and level (Bachelors, Masters, PhD)

Furthermore, women and men are not homogenous groups. It is important to know if the university collects data about **other social variables** that may be of interest for analysing sex-disaggregated data (such as age, care responsibilities, religion, ethnicity and migrant background)

In this initial step, it is also relevant to identify whether **other relevant data** may be available – for instance, sex-disaggregated data from climate surveys; data on gender-related courses and programmes; allocation of budget by gender, enabling gender-budgeting.

39 Further information on the award can be found here: <https://euraxess.ec.europa.eu/jobs/hrs4r-hrs4r-acknowledged-institutions>

4.2. In-depth data collection and analysis

Once available data are collected and analysed, the next step is to reflect on the main data gaps: what further information is needed to identify and understand the main gender equality challenges and how to address them? The audit should be as comprehensive as possible and encompass the three substantive areas of intervention – careers, decision-making and content.

For each area, the table below provides an indication of the main objective of the audit area and key aspects for auditing.

Table 1. Overview of areas, objectives and aspects for auditing

Area	Audit objective	Aspects for auditing
Careers	Setting up a knowledge base for removing gender-related institutional barriers to career advancement	<ul style="list-style-type: none"> • Sex-disaggregated data on recruitment, retention and promotion. • Sex-disaggregated data on committees for recruitment and promotion. • Criteria and procedures for recruitment and promotion. • Gender pay gap, by discipline and hierarchical level. • Work-life balance policies. • Anti-discrimination policies, including measures against gender-based violence and sexual harassment. • Gender equality training for all staff.
Decision-making	Setting up a knowledge base for tackling gender imbalances and gender bias in decision-making	<ul style="list-style-type: none"> • Sex-disaggregated data in managerial positions and decision-making bodies. • Level of gender awareness and gender competence in decision-making, including gender-budgeting. • Implementation of gender-budgeting • Gender equality training for staff in managerial positions and decision-making bodies.
Content	Setting up a knowledge base for integrating the gender dimension into teaching, research and innovation content	<ul style="list-style-type: none"> • Number of gender-related courses (elective/ mandatory), by discipline and level. • Level of gender mainstreaming in general curricula. • Training for teachers and researchers on sex and gender analysis in teaching and research content. • Presence of gender-related research groups, by discipline. • Level of integration of sex and gender analysis in curricula and research projects.

The ways to address these aspects will depend on the data available in each university and the areas which are in principle considered more relevant. Implementing the audit is not an end in itself. Rather, it is a means to prepare the GEP by identifying organisation-specific gender equality challenges. The audit may focus on some of these aspects and identify which data gaps have to be addressed as part of the GEP. For instance, it may be the case that a university does not have any record on gender-related courses: an objective of the GEP could be to build a database for gender-related courses. In other cases, data may be specifically collected during the audit – for instance, gender composition of decision-making bodies and committees for

recruitment and promotion. An objective of the GEP will be to ensure that these data are collected regularly.

Main methods

The main methods for data collection are desk analysis of documents and administrative records for the university (human resources, decision-making, curricula) as well as semi-structured interviews with representatives of the main university bodies (human resources, decision-makers, academic boards). If the university has in place any gender equality policies (such as those addressing gender equality training, work-life balance and sexual harassment) the audit should pay special attention to analyse them. The policy analysis should combine desk analysis (of documents that define the policy) and semi-structured interviews with relevant stakeholders (decision-makers, implementers and beneficiaries: staff, and students where relevant).

The strategy for implementing the audit will depend on the composition of the community of practice and the extent to which the collection of data is facilitated by top-management. There is no one-size-fits-all list of quantitative indicators or guidelines for interviews. As an indication, we provide below an example of how to audit gender equality in promotion procedures.

Box 2. Auditing gender equality in promotion

To analyse gender trends in career promotion, several **quantitative indicators** can be useful:

- » Number of career progression steps within the university since year x, broken down by disciplinary field; progression to temporary or permanent position; part-time or full-time position; and – where possible – by age, care responsibilities, religion, ethnicity, migrant background and any other available socio-demographic characteristics.
- » Share of women and men among applicants or persons shortlisted for promotion since year x, broken down as above.
- » Share of women and men promoted since year x, broken down as above.
- » Success rate of female and male applicants for promotion, broken down as above (the success rate is calculated as the number of persons promoted divided by the total number of applicants).

This information can be complemented by sex-disaggregated data on the composition of **promotion commissions**.

The main administrative source of information will be the records of internal career progressions held by the human resources department of the university. This should be complemented by desk analysis of documents establishing the criteria and procedures for promotion, if available.

Semi-structured interviews with representatives from the human resources department and members of promotion commissions will be useful for interpreting the significance of the collected data and gathering further information.

Here follows a list of key qualitative questions which may serve as cornerstones for these interviews:

- » Are promotion opportunities public and widely disseminated? Are women explicitly encouraged to apply?
- » Are there formalised standard procedures and guidelines for internal promotion procedures? If so, are

they thoroughly developed and transparent?

- » Are the criteria for promotion explicit, transparent and weighted in a standard way? Are they fixed for the entire process?
- » Is there a routine procedure in place to ensure that only explicitly stated criteria have an impact on promotion decisions and that the criteria are applied equally to every candidate?
- » Is gender expertise part of the required profile for the candidate? If not, is it positively rewarded?
- » Does the university have formalised policies for promoting gender equality in career progression? Is the management committed to promoting female representation at senior levels?
- » Are promotion panels gender-balanced? Is the level of authority and responsibility balanced between female and male promotion panel members?
- » Are there gender awareness initiatives and/or training on unconscious gender bias for the members of promotion committees – in particular with regard to career progression to influential positions?
- » Are there incentives for supporting/promoting early-stage career employees? Are gender-related issues considered?

Survey to staff

A survey to staff is an additional method of collecting data and may be of great relevance for exploring information which is not available through administrative records and a limited number of semi-structured interviews. In the TARGET project, this approach was used in some institutions and proved to be especially useful for exploring perceptions about issues such as work-life balance difficulties, obstacles for career progression or access to decision-making positions, overall levels of gender-sensitivity, and level of knowledge and support of gender equality policies in the organisation. A survey can also be a tool for monitoring trends in the organisation if it is regularly disseminated. The ACT project has developed the **GEAM survey** (Gender Equality and Monitoring Survey⁴⁰) which is publicly available and enables organisations to adapt the questionnaire to their specific needs. It adopts an intersectional approach for collecting socio-demographic data which may be of great relevance for analysing how gender inequality intersects with other social inequalities. We suggest use of the GEAM if a survey is feasible. However, launching a survey might be not the best approach if it is the first audit. It requires strong commitment from both top-management and the human resources department, as well as time and statistical expertise to analyse the results. An option in this case is to include a survey as **one of the measures of the GEP**.

40 Further information available at: <https://act-on-gender.eu/nes/gender-equality-audit-and-monitoring-geam-tool>

SWOT analysis

To support reflexivity, a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis should be performed once data are collected for each gender equality area. A SWOT analysis is a structured planning method that evaluates strengths, weaknesses, opportunities and threats with regard to the process of fostering specific organisational goals – in our context, structural change towards gender equality. Box 3 provides an example SWOT analysis.

Box 3. SWOT analysis: removal of gender-related institutional barriers to careers

<p>Strengths: characteristics of the organisation that give it an advantage in terms of the removal of gender-related institutional barriers to careers</p>	<p>Weaknesses: characteristics of the organisation that give it a disadvantage in terms of the removal of gender-related institutional barriers to careers</p>
<ul style="list-style-type: none"> » Legal framework exists when it comes to gender equality and anti-discrimination in the workplace. » Formalised standard procedures and guidelines for internal promotion procedures. » Overall, the number of men and women in teaching and research positions is relatively well balance 	<ul style="list-style-type: none"> » Gender imbalances across disciplines as a result of prevailing views on gender roles – traditionally male and female professions, faculties and departments. » No progress on the under-representation of women at the highest academic grade. » Gender imbalances in commissions for promotion. » No system in place for monitoring trends in career paths. » No anti-sexual harassment policy.
<p>Opportunities: elements that the organisation could exploit to foster the removal of gender-related institutional barriers to careers</p>	<p>Threats: elements in the organisational environment that could impede structural change towards the removal of gender-related institutional barriers to careers</p>
<ul style="list-style-type: none"> » Large number of female students (with a likelihood of increasing). » Policy documents could easily be used as a tool for raising awareness by use of gender-sensitive language and terminology. » There is a centralised Information System which could monitor trends in career paths. 	<ul style="list-style-type: none"> » Backlash – the general climate of ‘retraditionalisation’ in society and the emergence of conservative and far-right movements with an anti-gender-equality discourse. » Lack of concrete national measures and incentives to support gender equality in higher education, research and innovation.

This analysis supports the identification of the main priorities for action. In principle, priorities should be related to those areas in which gender inequalities are more pronounced and there are opportunities for action. The discussion of the audit results within the CoP, including management, is the starting point for designing the GEP.

5. GEP design

The audit analyses the status quo of the organisation and provides an empirical basis for identifying the priorities of the GEP and establishing objectives, concrete gender equality measures and targets.

A crucial aspect in this stage is to consolidate processes that have already begun as a result of the audit – strengthening the commitment of top-management and defining roles, responsibilities and resources⁴¹.

In line with the Horizon Europe GEP eligibility criterion, the design of the GEP also requires identifying the resources and gender expertise which will be devoted to its implementation. This paves the way to establishing a well-equipped gender equality structure with adequate gender competence and capacity for action.

5.1. Strengthening top-management commitment

Leadership and top-management commitment are essential for a successful GEP. During the audit stage, this commitment is crucial for giving institutional legitimacy and visibility to the audit and facilitating the collection of data. It is equally important to ensure that high-level management are actively involved in the discussion about the priorities of the GEP, main objectives and measures.

Representatives from management should participate in the meetings of the CoP in which the audit results are discussed and the GEP is designed. Top-management should also play a central role in the communication strategy and the dissemination of information. It should be the Rector or a high-level manager who announces the results of the audit, the start of the GEP design process and the approval of the GEP. A formal requirement of the Horizon Europe GEP eligibility criteria is that the GEP is signed by representatives from top-management and is made public via the institution's website.

Involving top-management in the GEP process is required to effectively embed gender equality within the institution. EIGE⁴² highlights three conditions that help to facilitate the process of making gender equality a **long-term objective**:

1. Incorporate a gender equality perspective and aims into the institutions steering documents.
2. Allocate gender equality work to a specific multi-annual budget.
3. Create and implement regular accountability, monitoring and evaluation processes, to flag when sustainability begins to lag and further actions are needed.

41 Palmén & Caprile, 2018.

42 EIGE 2016b, p. 3.

All three conditions can only be fulfilled with top-management level support and commitment to the GEP process. This requires not only raising gender awareness, but also building gender competence and strengthening accountability. The GEP should therefore include concrete measures to this end.

Horizon Europe GEP eligibility criteria requires training on unconscious gender bias for decision-makers, at a minimum. Based on our experience in TARGET, we think it is also important to consider **training activities** for upper management which provide room for discussing:

- + Evidence that gender equality benefits the priorities of the university in the areas of education, human resources, communication and external recognition (for example, by improving learning and working conditions; attracting, retaining and maximising talent; through media presence and positive image building; and through gaining legitimacy at EU and international levels).
- + Evidence that incorporating a gender dimension into the curricula and research activities benefits the priorities of the university in education and R&I (for example, by improving the quality of teaching and research; increasing the potential for innovation; and enhancing the responsiveness of education, research and innovation towards the needs of the whole society).

5.2. Defining roles, responsibilities and resources

In the initial phase, a CoP was established. Developing and consolidating this CoP is crucial for the successful design, implementation and monitoring of the GEP.

EIGE through their GEAR tool also recommends working in this way and highlights how this approach of **distributed responsibilities** (and not too much dependence on one or two actors) can prevent changes of leadership, budget cutbacks or apathy thwarting progress made towards GEPs.

This has implications for the distribution of roles and responsibilities within the CoP at the design stage. In fact, the quest for sustainability starts at the very beginning of the GEP process. An approach that factors in sustainability must incorporate the possibility of a transition phase – 'where the teams still continue to cooperate in the delivery of the action by gradually reducing their efforts as new institutional actors take over'⁴³.

The community of practice should also discuss the **resources** needed to implement the plan. This includes the creation of a permanently based **gender equality body** within the institution. Research states how 'a well-equipped and well-located gender equality body (such as a dedicated unit, working group, team or office) has been identified as a success factor to promote gender equality through institutional change and higher educational settings'⁴⁴. These bodies, and particularly the heads of

43 Cacace et al., 2015, p. ix.

44 Sekula & Pustulka, 2016, p. 18.

these bodies, should be aligned to top governance bodies and should hold a title that reflects proximity to power. This is a way to gain legitimacy within the institution. Furthermore, these bodies should have access to adequate and permanent resources – including staff, gender experts and a budget so activities can be carried out⁴⁵. The new Horizon Europe GEP eligibility criteria states that the GEP has to include a ‘commitment of resources and expertise in gender equality to implement the plan’⁴⁶.

5.3. Defining visions, objectives, measures and targets

Within TARGET, gender equality is defined in a comprehensive way and encompasses a vision in each of the three substantive areas defined: careers, decision making and content.

Table 2. Gender equality: areas of intervention and visions

Area of intervention		Vision
Careers	Removing gender-related institutional barriers to careers	<ul style="list-style-type: none"> • Overt discrimination and gender-based violence is eradicated. • Unconscious gender bias and structural obstacles are abolished. • Women and men benefit from healthy work-life balance. • Women and men are equally represented in all disciplines and hierarchical levels.
Decision-making	Tackling gender imbalances and gender bias in decision-making	<ul style="list-style-type: none"> • Women and men are equally represented in decision-making bodies. • Decision-making bodies are gender aware and gender competent.
Content	Integrating the gender dimension in teaching, research and innovation content	<ul style="list-style-type: none"> • Gender is mainstreamed in higher education curricula, including the presence of gender-specific subjects. • Research and innovation consider gender at all stages.

The design of the GEP should contain a discussion of:

- + the underlying gender concept or **vision** (How is gender defined?)
- + the gender equality **objectives** (What should be achieved?)
- + as well as the **assumptions** on reasons for gender inequalities (What are the underlying mechanisms that lead to gender inequality?) within the organisation.
- + This enables the identification of concrete **measures and targets**⁴⁷.

⁴⁵ EC, 2012a, p. 27.

⁴⁶ EC, 2021, p. 9.

⁴⁷ Wroblewski & Eikstein, 2018.

Visions, objectives and targets

The concept or **vision** of gender equality is highly context-sensitive and may be formulated in different ways in each university. An organisation may have a fixed vision that does not change over time. However, it can have different objectives that are adjusted to the vision from time to time. Furthermore, the vision may evolve in the long-term: one of the objectives of TARGET was to support universities in achieving a comprehensive vision of gender equality, not only focused on ‘fixing the numbers’. Another example of this evolving vision is the increasing attention paid to fight sexual harassment, an aspect which has been relatively absent in many universities until recently.

A vision is idealistic – in contrast, objectives must be realistic. The **objective** is what is to be ultimately achieved; the final form or situation we would like to see. These objectives have to be explicit and evidence-based, building on the work carried out in the audit. An explicit connection should be made between the audit results and the main objectives identified in the GEP. They should also reflect the expected and desired impact that the GEP will have in each area of gender equality. The following table provides an example of main audit results and links it to possible subsequent objectives in each of our three areas.

Table 3. Examples of audit results and related objectives

Area	Audit results	Possible objectives
Careers	Persistent gender imbalances in career progression. No system in place for monitoring trends in career paths of women and men in the university.	<ul style="list-style-type: none"> • Increase the proportion of newly appointed women professors. • Revise recruitment and promotion criteria. • Establish a system for collecting data to monitor trends in career progression.
Decision-making	Women are under-represented in decision-making bodies. There is no regular collection of sex-disaggregated data for decision-making bodies.	<ul style="list-style-type: none"> • Raise awareness of the significance of gender balance in decision-making bodies. • Establish a system for regular collection of sex-disaggregated data.
Content	Gender-related courses are scarce; gender is not mainstreamed in curricula. There is no record of gender-related courses.	<ul style="list-style-type: none"> • Training for teaching staff on the significance of sex and gender analysis. • Establish a database of gender-related courses.

The **objective** should not be formulated in vague terms, such as ‘increase the proportion of women among professors’ but should contain a concrete **target** value to be achieved by a certain date. In the course of the discussion on ways to achieve the target, a target could also be formulated that does not refer to the proportion of women among professors as a whole but rather the proportion of women among newly appointed professors.

Objectives should be formulated in a SMART way⁴⁸:

- + Specific (worded as concretely as possible)
- + Measurable (associated with quantitative and/or qualitative metrics)
- + Accepted (supported by all relevant stakeholder groups)
- + Realistic (achievable within the envisaged timeframe and with the resources provided)
- + Scheduled (to be fulfilled within a defined time frame)

The table below illustrates the differences between visions and objectives related to concrete targets.

Table 4. Examples of visions, objectives and targets

Vision	Objective	Target
Structural barriers for women's careers are abolished	Increase the share of women among newly appointed professors up to the share of women among applicants	Increase the share of women among newly appointed professors to X% by Y (date)
Women and men are equally represented in decision making	Increase the proportion of women in decision-making committees and boards	Increase the share of women on board A to X% by Y (date)
Gender is mainstreamed in the curricula	Increase the number of gender-related courses	Develop (#) gender-related courses in (#) disciplines by Y (date)
	Raise awareness of the relevance of sex/gender analysis among teaching staff	X% of teaching staff participating in gender training by Y (date)

Defining concrete measures

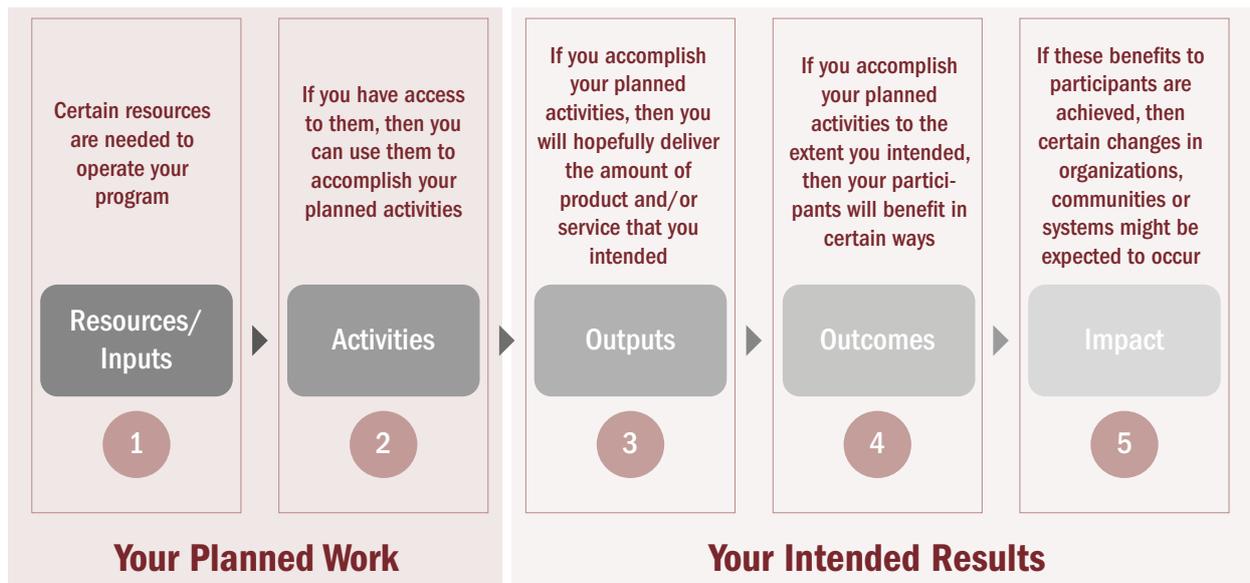
The second step involves developing a set of concrete measures to address the objectives identified. To this end, it is essential to answer the following questions for each measure:

- + What is the target?
- + What is the target group?
- + What is the timeframe?
- + Who is responsible?
- + What resources will be required?
- + How will the measure be monitored?

⁴⁸ Wroblewski, 2021.

In the course of designing the measure, the assumptions as to how interventions will result in the desired outcome (target) are usually formulated in a **theory of change (logic model)**. The program logic model is defined as a picture of how your organization does its work – the theory and assumptions underlying the program. A program logic model links outcomes (both short and long-term) with program activities/processes and the theoretical assumptions/principles of the program⁴⁹.

Figure 2. How to read the logic model



Source: W.K. Kellogg Foundation, 2004, p.1 and p. 3.

A logic model should indicate first the goal (intended impact), then the changes (outcomes) that need to be made to achieve that goal, then all the things that need to be delivered (outputs) to bring about those changes and the activities that need to be carried out in order to ensure that the planned outputs are delivered. A logic model provides a simplified, linear understanding of the intervention. Although this is useful as a starting point, it should be noted that usually all interventions involve loops⁵⁰.

As an example, we develop below the logic model for training on unconscious gender bias, addressed to staff in an HR department. The example illustrates that different targets must be defined for different stages. The intervention assumes that participation in training activities (including seminars and workshops) will increase participants' gender competence and enable them to detect unconscious gender bias in everyday practices, changing such practices to avoid gender-biased decisions. This will change decision-making processes, lead to 'better' decisions and contribute in the long run to achieving the objective of equal participation of men and women in all fields and hierarchical levels of an organisation.

⁴⁹ W.K. Kellogg Foundation, 2004, p. 3.

⁵⁰ Wroblewski, 2021.

Table 5. Logic model for awareness-raising measures (seminars, workshops) for staff

	1 Resource/Input	2 Activity	3 Output	4 Outcome	5 Impact
Description	Seminar concept, target group, trainers/experts	Selection process, seminar or workshop held	Completed seminars	Participants carry out their everyday work in a more gender-competent manner	Decision-making bodies behave differently
Target	Concept is developed, trainers are available, target group is invited	Seminars/ workshops are held according to schedule	Participants complete training as expected	Participants apply the content of the training in their everyday work	Decisions are made without an implicit gender bias

Achieving outputs, however, does not necessarily result in achievement of the expected outcomes. Although this should logically be the case, assumptions that the measures should work can prove to be wrong or unexpected circumstances can arise which might affect outputs or outcomes. As we shall see, monitoring allows continued analysis of these aspects and reformulation of assumptions and measures when needed.

Prioritising measures

Prioritising the measures identified above can be useful when thinking about allocating resources to different actions that aim to impact specific objectives. Three main axes can be identified – implementation (easy, medium or difficult), level of impact (low, medium or high), and time-span in the period of GEP implementation (short/medium term). One possible tool for ordering objectives according to the first two dimensions is the following table.

Table 6. Matrix: implementation & impact

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

Once measures have been mapped along the impact and implementation matrix – they can then be ordered according to timespan. For example, those measures and actions identified as ‘easy to implement’ with a ‘high impact’ in the short term

should be considered for implementation at the start of the GEP process. This means that the CoP and broader institutional stakeholders will begin to see concrete, visible results early on in the process. This may be key to taking the whole process forward. Prioritisation should be justified and made explicit⁵¹.

Embedding data collection processes

The TARGET project takes a self-reflexive approach to institutional monitoring, aiming to build up institutional capacity to identify relevant data as well as establish and adapt existing procedures, processes and information systems to improve data collection and address data gaps. The audit phase has not only provided a first round of data but has also enabled identification of relevant data gaps for analysing the status quo of the university in terms of gender equality. This means that improving data collection, mainly in those areas where action is prioritised, is a key issue in the design of the GEP.

Embedding the GEP in strategic institutional documents

The GEP should not only be public. Embedding the GEP in the key institutional documents of the university is a crucial aspect for giving relevance and visibility to the institution's commitment towards gender equality, and ensuring sustainability. This includes the statutes of the university and other strategic documents (for instance, mission statement, code of ethics, internal rules of operations, guidelines for appointment procedures etc).

Successful implementation: a reflexive approach

Whilst defining objectives and designing subsequent measures are key parts of the GEP design process, it cannot be taken for granted that well thought out measures and actions will automatically be successfully implemented and create the desired impact. There are many examples of well-thought out and designed policies which ultimately did not lead to the intended change. For example, Wroblewski⁵² discusses how despite the development of guidelines to increase transparency and reduce gender bias in appointment procedures for full professors at Austrian Universities, gender practices remain entrenched. The persistence of bias has been attributed to a lack of reflexivity. Another example can be found in work-life balance measures – as highlighted by Oetke et al.⁵³ policies and measures designed in this area must challenge the traditional view of women as fulfilling a caring role and must help to foster co-responsibility for care. Measures in this area must therefore be formulated to be gender inclusive. A key aspect is to avoid the idea that opportunities for parental leave and flexible work arrangements are only taken by women.

51 Palmén & Caprile, 2018.

52 Wroblewski, 2015.

53 Oetke et al., 2016.

6. Monitoring and self-assessment

Monitoring refers to the ongoing observation of: 1) the status quo of gender equality in an institution, taking the gender equality audit as the baseline; 2) the progress made towards implementing the concrete gender equality measures included in the GEP.

The results of the monitoring should be used to initiate an **internal gender equality discourse**. How did the situation change? What worked? What did not work? Why? What were the reasons for the success or failure of a measure? Is it necessary to set more concrete goals or develop the measures further? **Learning from failure** forms a key part of the reflexive process and can lead to improvements in existing measures or the development of new ones. Failure should not be punished but should be turned into 'constructive lessons'⁵⁴.

To achieve these effects, it is necessary to create a '**space for reflexivity**' which allows open discussion and provides a basis for organisational learning⁵⁵. This requires the commitment of management to gender equality policy as a long-term process. This process might include the implementation of activities that are unsuccessful or are based on wrong assumptions. The creation of a space for reflexivity thus also requires a climate of confidence and appreciation that facilitates open discussion of failure. Discussion of the monitoring results may lead to the adaptation of concrete measures that have been implemented or indeed to reformulation of the GEP.

Box 4. Monitoring and evaluation

Monitoring is defined as a continual function that uses the systematic collection of data on specified indicators to provide management and key stakeholders of an ongoing intervention with indications of both the level of progress towards and achievement of objectives and the use of any allocated funds. In contrast, evaluation is the systematic and objective assessment of an ongoing or completed project, programme or policy, covering its design, implementation and results. The aim of an evaluation is to determine the relevance and fulfilment of the objectives as well as the development of efficiency, effectiveness, impact and sustainability. An evaluation should provide credible and useful information that allows the lessons learned to flow into the decision-making process. Evaluation also refers to the process of determining the value or significance of an activity, policy or programme and ideally builds on monitoring data¹.

Monitoring and evaluation go hand in hand – neither is more important than the other. Monitoring ensures that the right thing is done, while evaluation ensures that the right outcomes are achieved.

¹See Espinosa et al., 2016; Salminen-Karlsson, 2016; Lipinsky & Schäfer, 2015).

⁵⁴ Wroblewski & Eckstein, 2018.

⁵⁵ Wroblewski, 2015; Moldaschl, 2005.

6.1. Monitoring indicators

Monitoring should contain indicators for each dimension that describe the status quo of gender equality in the institution (**institutional context indicators**) as well as indicators that describe the implementation of measures or policies (**implementation indicators**). The latter contain information about input (resources), activities, outputs and outcomes.

An indicator is a measurable variable used to represent an associated (but non-measured or non-measurable) factor or quantity. For example, the share of staff members who have passed gender competence training is used as one of several indicators of the gender competence of the institution. An indicator must refer to a specific gender equality goal mentioned in the GEP. These gender equality goals should, in turn, be consistent with the vision of gender equality⁵⁶. Examples of how indicators can reflect different objectives and visions of gender equality: Is gender equality achieved when women and men are equally represented (gender parity)? Is gender equality achieved when women are represented according to the share of women qualified for a position? Is gender equality achieved when a specific target quota set by the institution is reached? Is gender equality achieved when gender is mainstreamed in all courses?⁵⁷

Indicators can be either quantitative (for example, numbers, percentages or ratios) or qualitative (for example, assessment in qualitative terms).

Since in most cases the data (for example, administrative data) used for monitoring already exists, it is necessary to explicitly reflect whether this data is adequate for gender analysis. Gender-segregated data analysis is only a first step towards a full gender analysis. A **critical assessment** of available data sources, if appropriate for gender analysis, must be conducted to avoid re-stereotyping which could be counterproductive. Gender-segregated data is of limited value for gender analysis if the data collection process is biased. This is the case when the administrative purposes – the basis for the data collection – apply to one specific group more than others. If the validity of data on gender issues is limited, this must be addressed in the analysis and interpretation.

One relevant aspect of this critical reflection on data validity is the explicit discussion of data gaps. The interpretation of the indicators should address data gaps that provide important information for the further development of the monitoring.

6.2. Monitoring example

In this section we provide an example of how to develop a monitoring process in one specific area – removing gender-related institutional barriers to career development.

⁵⁶ Wroblewski et al., 2017.

⁵⁷ Wroblewski & Leitner, forthcoming.

In the gender audit, the status quo may be described as follows:

- + Composition of staff by gender, differentiated by faculty or discipline
- + Composition of staff by gender according to hierarchical level, differentiated by faculty or discipline
- + Students and graduates by gender, differentiated by faculty or discipline
- + Description of internal processes for staff selection, retention and promotion
- + Proposed measures may include:
 - + Awareness-raising activities (workshops) for staff members
 - + Use of gender-sensitive language in job advertisements
 - + Establishment of a gender equality body at the university

An example of possible **institutional context indicators** is:

- + Share of women among newly appointed staff members in year X in relation to the share of female applicants, by discipline and hierarchical level (requires gender-segregated data collection for several stages of the appointment procedure)

Concerning **implementation indicators**, below we develop the awareness-raising logic model for staff members. As explained above (Table 5), the example illustrates that different targets must be defined for different stages. In this case we include the corresponding monitoring indicators.

Table 7. Implementation indicators for logic model for awareness-raising measures (seminars, workshops) for staff

	1 Resource/Input	2 Activity	3 Output	4 Outcome	5 Impact
Description	Seminar concept, target group, trainers/experts	Selection process, seminar or workshop held	Completed seminars	Participants carry out their everyday work in a more gender-competent manner	Decision-making bodies behave differently
Target	Concept is developed, trainers are available, target group is invited	Seminars/workshops are held according to schedule	Participants complete training as expected	Participants apply the content of the training in their everyday work	Decisions are made without an implicit gender bias
Implementation indicator	Yes/No	Number of seminars	Number of participants by gender and other relevant criteria (such as target group)	Number of participants who apply the content of the training in their everyday work	Share of women at different stages of appointment procedures

6.3. Self-assessment

TARGET acknowledges that the implementation of a GEP is a long-term project which requires constant reflection on the development of gender equality, the formulated objectives and targets and the proposed measures. Like the process itself, continuous objectives, targets and measures may be adapted because of changes in context, progress or a more in-depth understanding of the specific problem⁵⁸.

The monitoring results provide a starting point for such a **reflexive process**. To initiate a gender equality discourse within an organisation, a format for discussing the monitoring results internally must be found. This requires the internal publication of monitoring results in different forms (such as a printed report or website) and a discursive format (such as a presentation or workshop). However, the monitoring results might also be used for external publication to present the university as a gender-sensitive organisation, demonstrate progress and highlight gender equality initiatives and contribute to national/regional gender equality discourse. A combination of internal and external strategies and formats may also be used.

It is key to acknowledge the significance of establishing an internal ‘space for reflexivity’. Spaces for reflexivity should be created in order to discuss the monitoring results and provide the participants with a secure environment for open discussion. In our approach, this space is provided by the CoP which also involves top-management from universities.

For many universities, implementing their first GEP is the first attempt to pursue gender equality goals in a structured, consistent and coherent manner. It can therefore be assumed that some of the planned measures will not achieve their objectives or that the underlying assumptions behind measures will prove unrealistic. Failed attempts also provide useful lessons learned that are of relevance for the evolution of existing measures or development of new ones. It should be clear that even if objectives are not reached immediately, gender equality goals will remain a priority. Failure should not result in sanctions but should be turned into constructive lessons learned. This is part of the top-management commitment.

Gender equality discourse emerging from the ‘space for reflexivity’ should also be used to obtain **commitment for gender equality goals** from all members of the institution. A key aspect of top-management commitment is requiring gender competent action from all staff members within their field of responsibility (including teachers in the teaching context, administrators in their administrative tasks, researchers in the context of research projects). This forms part of the organisational learning process and involves all staff members. In order to foster this process, management must also find a balance between requirements and incentives (for example, financial incentives).

58 Wroblewski & Eckstein, 2018.

7. Communication strategy

GEP implementation should include the development of an internal and external communication strategy on gender equality⁵⁹.

We have referred to communication issues throughout the previous chapters – here we provide a summary of the key points.

Within the university, the stages of the GEP development should be made transparent in order to inform institution members of the management's commitment to gender equality and detailed information should be provided at each stage (audit, design and approval of GEP, regular monitoring).

In order to involve staff from the outset, it is of utmost importance to announce the start of the audit and designate the team in charge.

Other aspects to be communicated are the:

- + Establishment of the Community of Practice, its composition and mission
- + Presentation of the results of the gender audit
- + Priorities and objectives with regard to gender equality
- + Presentation of measures implemented in the framework of the equality plan
- + Presentation of monitoring results and key conclusions

Information on the status quo of gender equality and on the implementation of the GEP can be made available to members of the institution via the intranet or by regular email updates.

In addition to internal communication on equality, the commitment of the university can also be communicated externally at selected points in time – for example, when the process is launched or the GEP is adopted, or when specific measures are launched. During the implementation phase, the monitoring reports could also be used for external communication.

External communication on gender equality can take place in separate publication formats, for example, through an annual gender or equality report that is publicly accessible. In addition, existing communication modes can be used, such as the website, the annual or activity report, or social media. In this way, the university's commitment to gender equality gains more significance and is clearly linked to other strategic goals.

59 Wroblewski, 2021.

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