D4.3 ATHENA Toolkit for transforming the institutional culture in terms of gender aspects

Project Acronym: ATHENA

Title: IMPLEMENTING GENDER EQUALITY PLANS TO UNLOCK RESEARCH POTENTIAL OF RPOS AND RFOS IN EUROPE

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[1] PU= Public, CO=Confidential, only for members of the Consortium (including the Commission Services), CL=Classified, as referred in Commission Decision 2001/844/EC

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Table of Contents

List of Tables

List of Figures

Acronyms and Abbreviations

EC	European Commission
EIGE	European Institute for Gender Equality
EU	European Union
GB	Gender balance
GEP	Gender Equality Plan
RFO	Research Funding Organisation
RPO	Research Performing Organisation
WLB	Work-life balance
WP	Work package

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1. Introduction

1.1 Purpose and scope

The ATHENA project is funded by the European Commission under the topic of the *Science with and for Society* work programme SwafS-09-2018-2019-2020 '*Supporting research organisations to implement gender equality plans*'. ATHENA overall aims at supporting the development and implementation of Gender Equality Plans (GEPs) in 6 research performing organisations (RPOs) and 2 research funding organisations (RFOs) in Europe. To that purpose, Work Package (WP) 4 (named '*GEPs development and implementation*') includes a specific task (T4.3) titled '*Drafting a Toolbox for preparation of customized GEPs*', whose aim is to provide key tools, resources and recommendations to develop the GEPs.

The present deliverable is the result of this task, entitled '*ATHENA Toolkit for transforming the institutional culture in terms of gender aspects*'. The tools, resources and recommendations included herein are distributed into 8 thematic areas, which are presented in sections 2.2 and 3.

1.2 Document structure

This deliverable describes:

- The objective and structure of the ATHENA Toolkit, as well as the selection criteria of the resources included therein **(section 2)**.
- The thematic areas among which the toolkit resources are distributed as well as a list including all the resources identified within the Toolkit **(section 3)**.
- The ATHENA Toolkit, including recommendations and key resources identified under each thematic area **(section 4)**.
- List of references and sources, the ATHENA sister projects, reviewed **(section 5)**.

2. Description of the ATHENA Toolkit

2.1 Objective of the ATHENA Toolkit

The ATHENA Toolkit aims at supporting ATHENA RPOs and RFOs institutions that are in the process of developing their GEPs. For this purpose, the toolkit offers an array of tools and resources that may assist project institutions with examples, guidance and inspiration useful for tailoring their institutional plans. This Toolkit should be used as complement of the *D4.1-Best practice compendium* project deliverable, which introduces relevant measures and actions identified across Europe research organisations for culture transformation and the development of GEPs.

The recommendations, resources and tools included within this toolkit may also serve any other research organisation interested in implementing a transformative change towards gender equality.

2.2 Structure of the ATHENA Toolkit

The toolkit compiles 74 resources, of which 20 are reports and 54 dynamic resources like videos, webinars, trainings, etc. The toolkit is organized according to the five content-related thematic areas recommended by the EC to organisations that will implement their GEPs. These areas are the followings:

- Area 1: Work-life balance and organizational culture.
- Area 2: Gender balance in leadership and decision-making.
- Area 3: Gender equality in recruitment and career progression.
- Area 4: Integrating the gender dimension into research and teaching content.
- Area 5: Measures against gender-based violence, including sexual harassment.

Additional areas were incorporated to provide research organisations with a wider array of useful resources in further potential action areas of interest:

- Area 6: Gender budgeting.
- Area 7: Institutional communication.

Key resources were also included within two other additional areas to support RPOs and RFOs in the design and establishment of their GEPs (Area 8) and useful tools from the European Commission (EC) and the European Institute for Gender Equality (EIGE) ('Other resources' section):

- Area 8: Resources about developing and implementing GEPs.
- Other resources.

The ATHENA Toolkit is divided into two parts: the first part includes specific main recommendations for each area and the second part lists the key identified resources and tools alphabetically. The recommendations have been drafted as result of the project activities and meetings carried out so far, i.e. WP2 activities on gender audit and organizational and national assessment including staff surveys, interviews, and focus groups and capacity building activities implemented under WP3. Useful support for the development and implementation of the Gender Equality Plans was also found within the '*Horizon Europe Guidance for Gender Equality Plans*'[2] from the European Commission (EC).

Each resource is presented in a box, which details the title of the resource, a brief description of its content, the type of resource identified (e.g. report, video,

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[2] Available at https://op.europa.eu/en/publication-detail/-/publication/ffcb06c3-200a-11ec-bd8e-01aa75ed71a1/language-en/format-PDF/source-232129669

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training, toolkit, etc.), and the name of the project/institution who produced it. At the right of the box the weblink to the resource may be found. The example below in Figure 1 shows how the resource is presented.

Resource title	Title of the resource	
Description	Brief description of its content	
WHAT	Type of resource identified (i.e. video, training, report, toolkit).	LINK HERE
WHO	Project/organisation who produced the resource	

Figure 1. Example about how the tools and resources of the ATHENA Toolkit are presented

The resources presented within this Toolkit are also shared at the ATHENA e-platform (www.gender-equality.eu), within the section 'ATHENA Toolkit'.

2.3 Selection criteria for the ATHENA Toolkit resources

A set of preliminary selection criteria has been adopted by the consortium, referring to the following aspects:

- Nature of the resources: It was agreed to include within the toolkit resources freely available on the web and with a practical nature like videos, trainings, webinars, toolkits etc. as well as guidance-like documents as handbooks, reports, etc. Relevant policy documents were also included due to its practical and applied nature. Publications and research papers purely addressing the scientific community have not been considered.
- Geographical scope: Focus has been placed on resources produced in Europe and referring to Europe.
- Source of the resource: Focus has been placed on resources produced and made available from EU sister projects (see list of sister projects reviewed in section 5.1). Most of the toolkits produced on the issue of gender equality in research and innovation and GEPs in Europe have put their efforts in compiling measures and actions for GEPs development. This toolkit complements their efforts by identifying key tools and resources across the EU funded projects on gender equality in science and research and, more specifically, focused on the development and implementation of GEPs.
- Language: Available resources in English language were only considered.
- Contents: It was considered resources dealing with gender equality in science and research and more specifically on GEPs. Resources addressing gender equality at overall were not considered.
- Temporal scope: Efforts have been made to include most recent available resources (last 5 years).

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3. Thematic areas

Figure 2. Thematic areas for the ATHENA Toolkit

Table 1. List of resources and tools within the ATHENA Toolkit

Resources title	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9
Acting against sexual harassment					■				
ACT on Career Advancement			■						
ACT on Gender Dimension				■					
ACT on Gender Equality in Decision Making		■							
Addressing gender-based violence and sexual harassment in academia and research organisations					■				
Best practices report (on leadership and decision-making)		■							
Beyond childcare: a gender approach to work-life balance in R&I institutional cultures	■								
Bias and Resistances: Exploring Challenges to Gender Equality in Leadership and Decision-Making		■							
Community of practice co-creation toolkit								■	
E-discussion: Addressing Sexual Harassment in Research Organizations					■				
EFFORTI Toolbox V2.0								■	
Enhancing female researchers careers in ICT/IST (Part 1)			■						
Enhancing female researchers careers in ICT/IST (Part 2)			■						
EQUAL-IST online toolkit								■	
EQUAL-IST Webinar on gender sensitive communication							■		
Gender bias in academic recruitment and promotion			■						
Gender budgeting in academia						■			
Gender budgeting in academia - Toolkit						■			
Gender budgeting in G20 countries						■			
Gender Budgeting to challenge gender biases in decision-making of RPOs						■			
Gender Budgeting: step-by-step toolkit						■			
Gender dimension in research				■					
Gender Dimension in Research and Curriculum: 12 SSH and STEM test institutions				■					

Resource	Colour marker
Gendered innovations. How inclusive analysis contributes to research and innovation	grey
Gendered innovations 2. How inclusive analysis contributes to research and innovation: policy review	grey
Gender Equality Audit and Monitoring (GEAM) tool	green
Gender Equality in Academia and Research – GEAR Tool	grey
Gender equality in decision-making bodies	orange
Gender Equality Index	green
Gender Inclusive Recruitment & Selection Toolkit for HR Professionals	light green
Gender in curricula	blue
Gender in decision-making "Gender-sensitive leadership: What does it take?"	orange
Gender in ICT IST research content - Why and how to integrate	blue
Gender in research	green
Gender Equality Monitoring Tool and Guidelines for Self-Assessment	grey
Gender sensitive language	red
Gender-sensitive mentoring programme in academia: a design process	orange
Glossary of key concepts for gender equality in research.	green
Guidelines for the prevention of sexual harassment, harassment on grounds of sex and psychological harassment	light blue
Guidelines to design customized GEPs	green
How to gender mainstream and enhance the quality of decision-making processes: Experiences from Uppsala University	orange
How to increase women's representation in decision-making boards?	orange
How to support Communities of Practice for driving institutional change towards Gender Equality	green
Identified best practices	orange
Implementing Gender Equality Plans through an action-research approach: Challenges and resistances	green
International Workshop on "Improvement of women's careers prospects and gender balance in decision-making bodies in Research Organisations"	orange
Introduction | Sex & gender dimension in sciences & technology fields	blue
Inventory of key resources	green

Resource	Category
LeTSGEPs Training Programme on Gender Equality, Gender Equality Plans and Gender Budgeting	(purple)
Methods on how to include gender dimension in research	(dark blue)
Micro Change Agents for Gender Equality: Transforming European Research Performing Organizations	(green)
Organisational culture and work-life balance	(magenta)
PLOTINA Formative toolkit	(green)
PLOTINA LEXICON	(red)
PLOTINA Library of Actions	(green)
Recommendations for GEP Report	(green)
Recommendations to prevent and fight sexual harassment in academia	(light blue)
Re-humanising work and life in academia and research	(magenta)
Report on existing identified opportunities for facilitating the engagement and access to the market of STEM researchers	(yellow-green)
Roundtable: How to design a gender sensitive culture	(green)
RPO's Gender Audit and Gender Budget Methodology Report	(purple)
Sexual harassment in academia – An international research review	(light blue)
SHE Figures 2021	(grey)
State of the Art analysis of Genger Budgeting experiences	(purple)
Tackling inequality through gender budgeting. Evidence and models	(purple)
The open, transparent, merit-based recruitment toolkit seen through gender equality lenses. A first attempt	(yellow-green)
Toolkit for integrating Gender-Sensitive Approach into Research and Teaching	(dark blue)
Toolkit on gender-sensitive communication	(red)
Tools and resources on gender-sensitive teaching methods in higher education	(dark blue)
Towards more equal, diverse, and inclusive research	(green)
Tracking tool for GEPs	(green)
What is gender budgeting?	(purple)
What is gender responsive budgeting?	(purple)
'Why science needs a new reward and recognition system'	(magenta)
Work-life balance	(magenta)

4. ATHENA Toolkit

4.1 Area 1. Work-life balance and organizational culture

Work-life balance (WLB) is a crucial aspect of the transformation of the culture of an institution towards gender equality. It is an important component of working conditions and applies to both women and men. That is why all organisations should consider the impact of work-life balance and organizational culture on gender equality. The transformation towards a more egalitarian institution should include measures ensuring the support to all staff to advance their career at the same time as fulfilling their personal responsibilities they may have outside the workplace.

Recommendations

- It is highly recommended the introduction of WLB practices within the transformative strategy. The '*Horizon Europe Guidance on Gender Equality Plans (GEPs)*' alludes to an array of practices and policies that can be addressed:
    - Support for caring responsibilities, including both childcare and care for other dependents (for instance, elderly people or relatives with disabilities).
    - Policies for parental leaves (for instance, extension of grant agreements or ensuring the extension of fixed term contracts).
    - Flexible working time arrangements, considering how departmental procedures and practices impact on staff with caring responsibilities or part-time workers, and remote working.
    - Reintegration of workers after career breaks, including active mentoring and support.
    - Management of workload, including how the different tasks are distributed and allocated (like teaching and administrative tasks versus research tasks in RPOs).
    - Support and advice on WLB.

- When it comes to RPOs, WLB strategy should consider not only the staff of the institution but also the students community. This means that needs might be quite different not only between both groups but also among the different staff categories within the institution. For instance, when it comes to administrative and academic staff members, the former ones use to work on a traditional scheme of public employees in which fixed working hours are scheduled and physical attendance to the office is required. On the contrary, academic workers, despite enjoying greater flexibility, may end up working

extra hours in more busy periods within the academic year when exams and administrative burden hinder the advance of the research tasks.

- Awareness-raising activities and the dissemination of existing WLB measures and provisions to the whole institutional community is key for the success of the institutional transformation. Training actions are a good starting point and they may address specific topics or specific groups.

Area 1.Work-life balance and organizational culture

Key resources and tools for WLB

Resource title	Beyond childcare: a gender approach to work-life balance in R&I institutional cultures
Description	A training on a gender approach to work-life balance in R&I institutional cultures to go beyond childcare
WHAT	Training
WHO	GE Academy project

LINK HERE

Resource title	Organisational culture and work-life balance
Description	A training on a gender-sensitive approach to work-life balance in R&I institutional cultures for HR officers, research team leaders, head of departments and gender equality or diversity officers.
WHAT	Training
WHO	GE Academy project

LINK HERE

Resource title	Re-humanising work and life in academia and research
Description	A webinar to promote reflection and dialogue about women and men as partners in building gender equality
WHAT	Webinar
WHO	GE Academy project

LINK HERE

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Resource title	'Why science needs a new reward and recognition system'
Description	This survey shows the impact of the pandemic for researchers with a career role
WHAT	Survey
WHO	CALIPER project

Resource title	Work-life balance
Description	A series of good practices to achieve a healthy work-life balance according to R&I peers research.
WHAT	Good practices
WHO	R&I PEERS project

4.2 Area 2. Gender balance in leadership and decision-making

The *SHE Figures 2021* report[3], despite the policies and strategies set up by many EU Member States on gender equality, still evidence the underrepresentation of women in academic and administrative leadership and decision-making positions in RPOs and RFOs in Europe. Overall, women account for 23.6% of heads of higher education institutions. Within the ATHENA consortium, the deliverable *D2.3 - Gender equality reports* also evidences this underrepresentation in many of the institutions. Thus, it is key to implement mechanisms and measures to pursue equal access to leadership positions at the same time as ensuring transparency in the area.

Recommendations

- Implement practices aiming at ensuring that women can take on and maintain in leadership positions. These practices may include adapting processes for selection of staff on committees/boards, establishing gender quotas or becoming committee membership more transparent. Further practices and measures may be consulted at the ATHENA *D4.1 – GEPs Best practices compendium* and the *Horizon Europe Guidance on GEPs*.
- Despite the abovementioned, it should be noted that pursuing gender balance (GB) in leadership and decision-making is more than just taking actions to increase women representation. Achieving GB in leadership and decision-making positions is a process that cross all aspects in the transformative process, from sex/gender-disaggregated data collection and analysis to organizational practices, gender sensitive training and WLB. This means that ensuring that an appropriate number of women are on boards/committees should be accompanied by actions to ensure decisions consider gender aspects and women are empowered to take an equal role.
- Transformative strategies should consider not only how women are represented in decision-making positions at the top of the institution, but also across administrative structures and academic faculties/departments.
- The strategy should include an analysis of the type of barriers that exist to ensuring women are represented in leadership and decision-making positions. The analysis should not be only institutional, but also structural and individual.
- There should be a clear establishment of targets (for instance, a determined percentage of increase of women holding lead positions at departments/faculties/boards in a given time period).

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[3] Available at https://op.europa.eu/en/web/eu-law-and-publications/publication-detail/-/publication/67d5a207-4da1-11ec-91ac-01aa75ed71a1 and within section 4.9 on 'Other resources'.

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- Ensuring transparency means that all candidates for leadership and decision-making positions clearly understand about what is required. This means that the information about the opportunities should be freely available and criteria used are clear. To this purpose, it is recommended that staff or stakeholders know the membership of key committees, that minutes are openly published at institutional communication channels and that vacancies are also published including the conditions to apply and the evaluation criteria.

Area 2. Gender balance in leadership and decision-making

Key resources and tools for Gender balance in leadership and decision-making

Resource title	ACT on Gender Equality in Decision Making	
	A deep analysis that also provides recommendations on how to overcome this inequality	LINK HERE
WHAT	Video	
WHO	ACT project	

Resource title	Best practices report (on leadership and decision-making)	
Description	A worldwide identification of Best Practices as well as leadership programmes in other sectors and analysis of programmes main features	LINK HERE
WHAT	Report (project deliverable)	
WHO	GEARING ROLES project	

Resource title	Bias and Resistances: Exploring Challenges to Gender Equality in Leadership and Decision-Making	
Description	A joint webinar with Gearing Roles | Bias and Resistances: Exploring Challenges to Gender Equality in Leadership and Decision-Making	LINK HERE
WHAT	Webinar	
WHO	GE Academy project	

Resource title	Gender equality in decision-making bodies	
Description	A series of good practices relating to gender equality in decision making bodies, according to R&I peers research	LINK HERE

WHAT	Good practices
WHO	R&I PEERS project

Resource title	Gender in decision-making "Gender-sensitive leadership: What does it take?"	LINK HERE
Description	A training to sensitise about the value of gender-sensitive-making processes among others	
WHAT	Workshop (video)	
WHO	GE Academy project	

Resource title	Gender-sensitive mentoring programme in academia: a design process	LINK HERE
Description	Toolkit to enable research institutions and universities to conceive or build a mentoring programme, or to enhance already existing programmes with useful considerations.	
WHAT	Working paper	
WHO	GARCIA project	

Resource title	International Workshop on "Improvement of women's careers prospects and gender balance in decision-making bodies in Research Organisations"	LINK HERE
Description	Discussion on how to close the gap for women's careers progression and achieve gender balance in decision-making bodies.	
WHAT	Workshop (video)	
WHO	LETSGEPS project	

Resource title	How to gender mainstream and enhance the quality of decision-making processes: Experiences from Uppsala University	LINK HERE
Description	Observations and lessons learnt from Uppsala University on gender mainstreaming	
WHAT	Article	
WHO	SPEAR Project	

Resource title	How to increase women's representation in decision-making boards?	LINK HERE
Description	A CHANGE case study from the University of Aveiro, Portugal	

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WHAT	Webinar PPT presentation
WHO	CHANGE project

Resource title	Identified best practices
Description	Interactive map with information on best practices identified by the GERAING ROLES project
WHAT	Interactive map with best practices in Europe
WHO	GERAING ROLES project

LINK HERE

4.3   Area 3. Gender equality in recruitment and career progression

ATHENA results from WP2 on gender audit and organizational assessment show that in most of the institutions women are penalized for their maternal leaves and caring responsibilities periods when evaluating merits and productivity. In addition, they tend to invest more efforts in quality teaching and the support to students as well as other departmental duties at the expenses of time invested in research. Thus, measures to ensuring that women and men get equal chances to develop and advance their careers are needed.

Recommendations

- When implementing strategies for recruitment, selection and career progression, it is key to review critically the existing selection procedures and process at all stages. In case of identification of any bias, actions for remedy should be put in place.
- It should be considered not only the quality of the recruitment and career progression practices, but also how the policies and initiatives can promote GE in research and scientific careers.
- It is worth noting that pursuing GE in recruitment and career progression may be addressed in synergy with other actions on Areas 1 and 2 (WLB and GB in leadership and decision-making).
- It is highly recommended the development and implementation of unconscious bias training for recruiters, reviewing language used in job adverts and being aware of language biases in recommendation letters. The box below provides some recommendations for gender sensitive use of language.

> Tips for job advertisement and recommendation letters
>
> Remove the generic use of 'man' or any other word that may refer to men applicants rather than women:
> - Substitute for 'person'/'people', 'candidate', 'applicant', 'individual(s)'.
> - Delete unnecessary references to masculine terms.
>
> Remove the generic use of 'he' by:
> - Using plural nouns.
> - Using the passive voice.
> - Substituting 'who' for 'he and articles ('the', 'a', 'an') for 'his'.
> - Substituting 'one', 'we' or 'you'.
> - Minimizing the use of indefinite pronouns (for instance, 'someone', 'everybody').
>
> Remove sexism from adverts by:
> - Using 'Ms' instead of 'Miss' or 'Mrs.', even when a woman's marital status is known.

- Using a married woman's first name instead of her husband's (e.g. "Ms. Anabelle Le" not "Mrs. Herman Lee").
- Using the corresponding title for females ('Ms.', 'Dr.', 'Prof.') whenever a title is appropriate for males.
- Using 'Dear colleague', or 'Professor', etc. in letters to unknown persons (instead of 'Dear Sir', 'Gentlemen').

Area 3. Gender equality in recruitment and career progression

Key resources and tools for GE in recruitment and career progression

Resource title	ACT on Career Advancement
Description	Important factors for career advancement and how the ACT project address them
WHAT	Video
WHO	ACT project

LINK HERE

Resource title	Enhancing female researchers careers in ICT/IST (Part 1)
Description	Webinar that highlights the measures promoted by TU Wien Faculty of Informatics, which has put in place a set of interesting measures along more than 10 years, among others including opening post-doc-assistant and tenure-track researcher positions for women only
WHAT	Webinar
WHO	EQUAL-IST project

LINK HERE

Resource title	Enhancing female researchers careers in ICT/IST (Part 2)
Description	A webinar presenting the initiatives undertaken by Radboud University, Institute on Computing and Information Sciences, which has been awarded within the 2017 Minerva Awards from Informatics Europe, devoted to initiatives supporting the transition of female Ph.D. and postdoctoral researchers into faculty positions.
WHAT	Webinar
WHO	EQUAL-IST project

LINK HERE

Resource title	Gender bias in academic recruitment and promotion	LINK HERE
Description	A webinar to recognize and overcome gender bias	
WHAT	Webinar	
WHO	GE Academy project	

Resource title	Gender Inclusive Recruitment & Selection Toolkit for HR Professionals	LINK HERE
Description	Toolkit that presents three steps that we recommend for a gender inclusive R&S process. The three steps are 1) Composing an equitable R&S committee, 2) Standardised and gender inclusive R&S processes, and 3) Evaluation, monitoring and reporting.	
WHAT	Toolkit	
WHO	EQUAL4EUROPE project	

Resource title	Report on existing identified opportunities for facilitating the engagement and access to the market of STEM researchers	LINK HERE
Description	This deliverable describes relevant actions for tackling these key issues at stake for attracting more female students into STEM curricula and facilitating female researchers' mobility between academic research jobs to the market	
WHAT	Report (project deliverable)	
WHO	CALIPER project	

Resource title	The open, transparent, merit-based recruitment toolkit seen through gender equality lenses. A first attempt	LINK HERE
Description	A table based on a collective discussion within the GEARING-Roles project on how the OTM-R Checklist could be updated to foster gender equality in the researcher recruitment processes	
WHAT	Working document	
WHO	GEARING ROLES project	

4.4 Area 4. Integrating the gender dimension into research and teaching content

The transformative strategy should also consider how the gender perspective or dimension will be introduced into research content or teaching activities and outputs of the institution. This refers to the incorporation of measures to incorporate GE within the institutional research and innovation priorities, the processes to ensure that gender analysis is included in the design and outputs of research and teaching activities and the support to researchers in the creation of methodologies which includes the gender dimension.

The integration of the gender dimension into research and teaching must be covered across the whole R&I process: from the formulation of research questions, to the development of methodologies, sex/disaggregated data analysis and the evaluation of results and its transfer to the market.

Recommendations

RFOs:
- RFOs play a key role in this area as they shape the research activities and outputs of the RPOs. Thus, it is crucial that they include within their transformative strategies measures to ensure that the gender dimension is properly integrated into the contents of the R&I project they support. The *Horizon Europe Guidance on GEPs* includes a set of useful questions that RFOs should consider when implementing their gender equality strategies.
- It is recommended to encourage or request applicants to consider whether the gender dimension is relevant to the proposed research project, and specify how it will be taken into account.
- It is also key to consult and include gender experts in designing research funding programmes and in monitoring and evaluation.
- Actions on promoting and disseminating research that has successfully integrated the sex/gender dimension are also recommended to be included.

RPOs:
- RPOs should ensure that their research includes a gender impact assessment.
- They are recommended to do internal quality assurance for research and teaching programmes to evaluate if the gender dimension has been incorporated properly.

Area 4. Integrating the gender dimension into research and teaching content

Key resources and tools for integrating the gender dimension into research and teaching content

Resource title	ACT on Gender Dimension
Description	Why gender dimension is important in research: Integrating sex and gender analysis into research and innovation helps to make better science. Explicitly taking into account the different needs of women and men, girls and boys, and gender diverse people will not only improve the quality of new knowledge, but will also enhance the societal relevance of novel products and services.
WHAT	Video
WHO	ACT project

LINK HERE

Resource title	Gender dimension in research
Description	This training will give an in-depth introduction to the inclusion of the gender dimension in 4 specific research fields: Mobility, Energy, Human Computer Interaction and Robotics.
WHAT	Training
WHO	GE Academy

LINK HERE

Resource title	Gender dimension in research and curriculum: 12 SSH and STEM test institutions
Description	This paper is a collection of reports that map gender dimension in the existing research and curricula, conducted by the GARCIA project partners in the following countries: Belgium, Iceland, Italy, the Netherlands, Slovenia and Switzerland. The reports present qualitative and quantitative analyses of the research projects and curricula conducted during the year 2013 at two test departments – one from social sciences and humanities field (SSH) and the other from the field of science, technology, engineering and mathematics (STEM). The reports also include the analysis of the gender structure of

LINK HERE

	the project teams, lecturers, and students, if available.
WHAT	Working paper
WHO	GARCIA project

Resource title	Gender in curricula
Description	Towards gender sensitive curricula in STEM: identifying needs, building strategies
WHAT	Training
WHO	GE Academy

LINK HERE

Resource title	Gender in ICT IST research content - Why and how to integrate
Description	A webinar towards the implementation of Gender Equality Plans" on: "Gender in ICT/IST research content: Why and how to integrate a gender (and intersectional) approach in your research projects
WHAT	Webinar
WHO	EQUAL-IST project

LINK HERE

Resource title	Introduction	Sex & gender dimension in sciences & technology fields
Description	It aims at familiarising viewers with basic concepts and definitions about integrating sex and gender in research content. It will go through the main issues at stake about gender in research. This training addresses people who are not yet familiar with the concept of gender in research.
WHAT	Training
WHO	GE Academy project

LINK HERE

Resource title	Methods on how to include gender dimension in research
Description	This training provides a mutual learning and exchange: as you are getting inspiration from others. It sensitises about the importance of including the sex and gender dimension in research content and it familiarises with methodologies and approaches aimed at including the sex and gender dimension in research content.

LINK HERE

WHAT	Training
WHO	GE Academy project

Resource title	Tools and resources on gender-sensitive teaching methods in higher education
Description	Collection of online material that aims at encouraging teaching staff to integrate the gender dimension into their teaching. A variety of information is provided in form of toolboxes, best practice examples, manuals, guidelines and training tools
WHAT	Report
WHO	BALTIC GENDER project

LINK HERE

Resource title	Toolkit for integrating Gender-Sensitive Approach into Research and Teaching
Description	Toolkit to help researchers integrate gender dimension in their ongoing research and teaching (of undergraduate, graduate and doctoral courses), and to apply while conceiving new projects and students' curricula
WHAT	Toolkit – Working paper
WHO	GARCIA project

LINK HERE

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4.5 Area 5. Measures against gender-based violence, including sexual harassment

ATHENA consortium agreed that gender-based violence and sexual harassment is a deceptive topic as there may be many members within the institutions that think no issues of gender-based violence and/or sexual harassment exist but the truth is that they may be hidden as victims are reluctant to talk about it or report it. ATHENA institutions are subject to their local/regional laws and regulations but are encouraged to implement mechanisms for effective identification and response to discriminatory actions and/or sexual harassment.

Recommendations

- It is recommended to well detect any form of gender-based violence and sexual harassment. Gender-based violence and sexual harassment are unfortunately "hidden" and uncomfortable occurrences which are rarely brought to surface. An attentive observation and analysis is needed to identify cases and develop appropriate preventive and counter measures.
- Measures included within the transformative institutional strategy should address the following dimensions: establishing code of conducts to clarify when relationships are and are not considered harassment; a policy outlining how the institutional members can report instances of gender-based violence; set out visible and easily understandable information about the investigatory process; include support for victims; cover disciplinary/grievance measures and prosecution.
- Interventions in this area are closed linked with the institutional communication area (area 7) as the whole institution may be mobilized to establish a culture of zero tolerance towards any kind of gender-based violence. This includes communication activities to become all institutional members aware of the identification of sexual harassment and of the steps to be taken at the same time as they become empowered to change attitudes, intervene where necessary and create an inclusive culture for the whole institution.

Area 5. Measures against gender-based violence, including sexual harassment

Key resources and tools for measures against gender-based violence, including sexual harassment

Resource title	Acting against sexual harassment
Description	Training that focuses on a) Understanding sexual harassment as an expression of gender violence and power relations, b) Discussing and providing examples of interventions and policies

LINK HERE

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	c) Highlighting the importance of embedding sexual harassment policies in institutional structural change
WHAT	Training
WHO	GE Academy

Resource title	Addressing gender-based violence and sexual harassment in academia and research organisations
Description	A roundtable addressing topics such as: a) Mutual learning and exchange: getting inspiration from others about how to address gender-based violence(GBV), b) Knowledge exchange: brief about the expressions and forms of GBV in academia, c) Strategies: facilitate approaches aimed at combating/ reducing GBV in academia, d) Tools: address ways to include GBV in a gender+ equality agenda: challenges and pitfalls, e) Tools: exchange on how to address GBV in GEP design and implementation, f) Familiarise with theoretical and practical implications connected to the application of different conceptualisations of GBV to promote institutional change in academic/research institutions
WHAT	Virtual roundtable
WHO	GE Academy

LINK HERE

Resource title	E-discussion: Addressing Sexual Harassment in Research Organizations
Description	This e-discussion aims to provide recent insights concerning the occurrence of, response to and prevention of sexual harassment in research performing and research funding organizations.
WHAT	e-discussion
WHO	GenPORT project

LINK HERE

Resource title	Guidelines for the prevention of sexual harassment, harassment on grounds of sex and psychological harassment
Description	A report with precise guidelines, with examples
WHAT	Report
WHO	TRIGGER project

LINK HERE

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Resource title	Recommendations to prevent and fight sexual harassment in academia
Description	A report describing sexual harassment and giving recommendations to prevent it and fight it in academia.
WHAT	Report
WHO	EGERA project

LINK HERE

Resource title	Sexual harassment in academia – An international research review
Description	Review focusing on (a) existing research reviews on sexual harassment in academia and working life at large, (b) a selection of topranked, peer-reviewed research articles on sexual harassment in academia, (c) all Swedish and other Nordic research publications on sexual harassment in academia, as well as (d) the state of knowledge and methodological challenges of research on prevalence of sexual harassment
WHAT	Report
WHO	Swedish Research Council

LINK HERE

4.6   Area 6. Gender budgeting

Gender budgeting is aimed at integrating the gender perspective into the financial processes and procedures of the RPOs and the RFOs. It is useful as it is an instrument that may create new approaches for decision-making in terms of allocating and raising resources and identifying gender inequalities in resources and workload.

Recommendations

- Gender budgeting is an aspect that goes beyond identifying and taking solutions to gender gap in staff salaries and other type of work remunerations. Thus, when addressing gender budgeting, it should be considered how financial decisions and strategies affect the outcomes and inequalities in terms of gender.
- Gender budgeting should be applied by reviewing finance decisions to ensure that these contribute to the advancement of gender equality, trying not to reinforce existing inequalities.
- Develop methods to measure economically and financially the cost of gender inequality for instance considering loss of talents, productivity rates, etc.

Area 6. Gender budgeting

Key resources and tools for gender budgeting

Resource title	Gender budgeting in academia
Description	An analysis and evaluation of the gender biases in management methods and decision making processes in European academic institutions.
WHAT	Working paper
WHO	GARCIA project

LINK HERE

Resource title	Gender budgeting in academia - Toolkit
Description	A guide for integrating gender into the financial processes and procedures of academic and scientific institutions
WHAT	Toolkit
WHO	GARCIA project

LINK HERE

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Resource title	Gender budgeting in G20 countries
Description	The paper takes stock of GB practices in G20 countries and benchmarks country performance using a GB index and data gathered from an IMF survey.
WHAT	Working paper
WHO	International Monetary Fund (IMF)

LINK HERE

Resource title	Gender budgeting: step-by-step toolkit
Description	Toolkit from EIGE providing steps for the implementation of gender budgeting strategies.
WHAT	Toolkit
WHO	EIGE

LINK HERE

Resource title	Gender budgeting to challenge gender biases in decision-making of RPOs
Description	Report with recommendations for policy on how the use of gender budgeting contribute to gender decision making strategies at RPOs.
WHAT	Policy brief
WHO	ACT project

LINK HERE

Resource title	LeTSGEPs Training Programme on Gender Equality, Gender Equality Plans and Gender Budgeting
Description	Training materials for implementing partners with 4 modules ranging from Gender Equality to Gender Budgeting, How to develop a Gender Budgeting Process and How to develop a Gender Auditing Report preliminary to the Gender Budgeting Process.
WHAT	Training (PPT presentation)
WHO	LeTSGEPs project

LINK HERE

Resource title	State of the art of gender budgeting experiences
Description	Effective organisational practices to increase the participation and career advancement of women researchers, improving their working conditions.
WHAT	Report (project deliverable)
WHO	LeTSGEPs project

LINK HERE

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Resource title	Tackling inequality through gender budgeting. Evidence and models
Description	Report that synthesizes evidence on gender budgeting, presenting experiences form national and sub-national governments and civil society actors.
WHAT	Report
WHO	Wales Centre for Public Policy

LINK HERE

Resource title	RPO's Gender Audit and Gender Budget Methodology Report
Description	How to develop a Gender Budgeting Process and how to develop a Gender Auditing Report preliminary to the Gender budgeting process
WHAT	Report (project deliverable)
WHO	LeTSGEPs project

LINK HERE

Resource title	What is gender budgeting?
Description	Video explaining what gender budgeting means in practice and how governments can make it happen.
WHAT	Video
WHO	EIGE

LINK HERE

Resource title	What is gender responsive budgeting?
Description	The video explains gender responsive budgeting and how it is used to mainstream gender in governance planning and budgeting.
WHAT	Video
WHO	UN Women

LINK HERE

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4.7 Area 7. Institutional communication

Working on making institutional communication gender sensitive can be highly beneficial and have indirect impact on all the above-mentioned intervention areas. This is actually a cross cutting area that can be addressed through a variety of actions to be included in the gender strategy.

Recommendations

- The mandatory process-related requirements that RPOs and RFOs should consider for the development of their GEPs include the publication of the gender strategy document on the institution's website. This strategy document or GEP must be actively communicated within the whole institutional community.
- It is highly recommended to undertake initiatives like training and raising awareness on gender sensitive institutional communication and or gender and language. This topic is closely related to the training topics mentioned within area 3, which address unconscious bias for recruiters and the awareness raising of language bias.
- Under this area numerous initiatives can be undertaken. Some examples of them are gender sensitive guidelines to communication, restyling websites and online platforms to avoid bias and use inclusive visual and textual communication. Further potential actions to be implemented may be consulted within *D4.1 – Best practices compendium*.
- Address gender sensitivity in development of websites and mobile applications.

Area 7. Institutional communication

Key resources for institutional communication

Resource title	EQUAL-IST Webinar on gender sensitive communication
Description	Presentations on "Gender, language, empowerment" and on the "Available tools for promoting gender sensitive communication".
WHAT	Webinar (PPT presentations)
WHO	EQUAL-IST project

LINK HERE

Resource title	Gender sensitive language
Description	A list of successful practices relating to gender-sensitive language, according to R&I peers research
WHAT	Good practices
WHO	R&I Peers project

LINK HERE

Resource title	Toolkit on gender-sensitive communication
Description	A resource for policymakers, legislators, media and anyone else with an interest in making their communication more inclusive
WHAT	Toolkit
WHO	EIGE

LINK HERE

Resource title	PLOTINA LEXICON
Description	Definition of the terms most used in gender equality
WHAT	Webinar (PPT presentations)
WHO	PLOTINA project

LINK HERE

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4.8 Area 8. Resources about developing and implementing GEPs

ATHENA RPOs and RFOs are currently at the stage of developing their GEPs. This area has been included with the aim of providing them with useful tools for the consultation of ideas and potential measures, actions, etc. that facilitates the process of developing the GEPs. Some of the resources include other toolkits from sister projects, which presents potential measures and actions that should be considered as complement of the identified measures presented at the project *D4.1 - Best practice compendium*.

Area 8. Resources about developing and implementing GEPs

Key resources about developing and implementing GEPs

Resource title	Community of practice co-creation toolkit
Description	The toolkit offers methods and practices for members of a Community of Practice to work collaboratively for advancing gender equality
WHAT	Toolkit
WHO	ACT project

LINK HERE

Resource title	EFFORTI Toolbox V2.0
Description	Evaluation Framework for Promoting Gender Equality in Research and Innovation.
WHAT	Toolkit
WHO	EFFORTI project

LINK HERE

Resource title	EQUAL-IST online toolkit
Description	An inventory of other toolkits, good practices, tools & guidelines
WHAT	Toolkit
WHO	EQUAL-IST project

LINK HERE

Resource title	Gender Equality Audit and Monitoring (GEAM) tool
Description	An integrated environment for carrying out survey-based gender equality audits in academic organizations. It comprises a collection of questions that cover most aspects

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	of gender equality in academic organizations, providing high-quality data for designing and implementing gender equality measures and assessing their impact over time.	
WHAT	Tool	
WHO	ACT project	

Resource title	Gender Equality Index	LINK HERE
Description	This is a very useful resource for any organisation that wish to conduct a quantitative analysis of gender dimensions. In addition, this table can be used as a guideline to implement and track gender equality indicators.	
WHAT	Tool (Indicators)	
WHO	EQUAL4EUROPE	

Resource title	Gender Equality Monitoring Tool and Guidelines for Self-Assessment	LINK HERE
Description	The report provides concrete guidance for each case with tools and guidelines.	
WHAT	Report (project deliverable)	
WHO	TARGET project	

Resource title	Gender in research	LINK HERE
Description	Glossary of key concepts for gender equality in research.	
WHAT	Glossary of terms	
WHO	EQUAL4EUROPE	

Resource title	Guidelines to design customized GEPs	LINK HERE
Description	Guidelines to identify initial priorities of the GEP on the basis of the audits undertaken	
WHAT	Guidelines/tools (project deliverable)	
WHO	TARGET project	

Resource title	How to support Communities of Practice for driving institutional change towards Gender Equality	LINK HERE
Description	This document presents reflections on the experiences of the facilitators of the communities of practice (CoP) which were	

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	established as part of the project ACT. Since the CoP approach is increasingly becoming recognised as a useful way to stimulate practice of and knowledge on institutional change towards gender equality (GE), we provide information on aspects that should be taken into account by policy makers on European, national and institutional level.
WHAT	Policy brief
WHO	ACT project

Resource title	Implementing Gender Equality Plans through an action-research approach: Challenges and resistances
Description	Analysing some potential strategies to overcome possible challenges encountered when implementing a GEP and to ensure the success of both gender initiatives and national projects
WHAT	Working paper
WHO	CHANGE project

LINK HERE

Resource title	Inventory of key resources
Description	The most relevant and up-to-date key resources and training materials needed to feed the training design process
WHAT	Toolkit
WHO	GE Academy

LINK HERE

Resource title	Micro Change Agents for Gender Equality: Transforming European Research Performing Organizations
Description	The results from this study can be useful when developing gender equality strategies, policies and practices and can also be used to empower gender equality micro change agents that face challenges while trying to implement GEPs and promote structural change in any kind of institution.
WHAT	Publication
WHO	CHANGE project

LINK HERE

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Resource title	PLOTINA Formative toolkit
Description	This Toolkit is for all those Research Performing Organizations (RPOs) and Research Institutions (RFOs) who want to implement gender equality policies and processes in their organizations in order to prevent and overcome gender inequalities and biases
WHAT	Toolkit to draft the GEPs
WHO	PLOTINA project

LINK HERE

Resource title	PLOTINA Library of Actions
Description	A set of modular and adaptable resources for any RPO at the starting stage in the setting up of GEPS to enable the development, implementation and assessment of self-tailored Gender Equality Plans (GEPs) with innovative and sustainable strategies for Research Performing Organizations (RPOs)
WHAT	Tool on list of actions to address gender inequalities
WHO	PLOTINA project

LINK HERE

Resource title	Recommendations for GEP Report
Description	Providing GEP implementing institutions with additional insight, and a mapping of possible inspirations for the development of GEPs. Provides institutions with guidance for their GEP preparation.
WHAT	Report (project deliverable)
WHO	GEARING ROLES project

LINK HERE

Resource title	Roundtable: How to design a gender sensitive culture
Description	A roundtable discussion to share and promote what has been done in different projects to achieve a gender sensitive culture. It will focus on the 'nuts and bolts' (tips, recommendations and lessons learned) of what is needed to succeed in designing a gender sensitive culture in your institution.
WHAT	Roundtable (webinar)
WHO	GENDER-SMART project

LINK HERE

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Resource title	Towards more equal, diverse, and inclusive research
Description	intended to raise awareness of the versatile aspects spanning gender equality in the research and innovation (R&I) sector, gathering practitioners operating mainly in countries from Central and Eastern Europe who have committed to the promotion of institutional change to advance gender equality in their organisations.
WHAT	Policy brief
WHO	ACT project

LINK HERE

Resource title	Tracking tool for GEPs
Description	An excel tool to keep track of the process of setting-up of GEP divided into i) Preliminary steps for adopting a GEP; (ii) The negotiation process; (iii) Designing the GEP; and (iv) Dissemination and engaging key stakeholders.
WHAT	Tool
WHO	EQUAL4EUROPE project

LINK HERE

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4.9 Other resources

This section includes other key and worth reading publications and tools from the European Commission (EC) and institutions belonging to it like the European Institute for Gender Equality (EIGE) relevant for the development and implementation of transformative strategies at European RPOs and RFOs.

Area 9. Other resources

Other resources tools

Resource title	Gender Equality in Academia and Research – GEAR Tool
Description	The Gender Equality in Academia and Research (GEAR) tool provides universities and research organisations with practical advice and tools through all stages of institutional change, from setting up a gender equality plan to evaluating its real impact.
WHAT	Tool
WHO	EIGE

LINK HERE

Resource title	Gendered innovations. How inclusive analysis contributes to research and innovation
Description	This factsheet presents key findings from the EC policy report "Gendered Innovations 2: How inclusive analysis contributes to research and innovation"
WHAT	Factsheet
WHO	European Commission (EC)

LINK HERE

Resource title	Gendered innovations 2. How inclusive analysis contributes to research and innovation: policy review
Description	A policy review that highlights the results of the expert group and contains definitions of terms and methods relating to sex, gender and intersectional analysis, interdisciplinary case studies displaying how to integrate the gender dimension into various fields of research and innovation, as well as concrete policy recommendations.

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Resource title	SHE Figures 2021
Description	Gender in research and innovation: statistics and indicators
WHAT	Report
WHO	EU Publications

5. References

5.1 List of sister projects reviewed

Table 2. List of sister projects reviewed

List of projects	Website
ACT	https://act-on-gender.eu/project
BALTIC GENDER	https://www.baltic-gender.eu/
CALIPER	https://caliper-project.eu/
CHANGE	https://www.change-h2020.eu/
EFFORTI	https://efforti.eu/
EGERA	Project website not working anymore
EQUAL4EUROPE	https://equal4europe.eu/
EQUAL-IST	https://equal-ist.eu/
GARCIA	http://garciaproject.eu/
GE ACADEMY	https://ge-academy.eu/the-project/
GEARING ROLES	https://gearingroles.eu/
GEECCO	http://www.geecco-project.eu/home/
GENDERACTION	https://genderaction.eu/
GENDER-SMART	https://gender-smart.eu/
GENERA	https://genera-project.com/
LETSGEPS	https://letsgeps.eu/
LIBRA	https://www.eu-libra.eu/
MINDTHEGEPS	https://mindthegeps.eu/
PLOTINA	https://www.plotina.eu/
RESET	https://wereset.eu/
R&I PEERS	http://ripeers.eu/
SPEAR	https://gender-spear.eu/
STAGES	https://www.stagesproject.eu/
TARGET	http://www.targetproject.eu/
TARGETED-MPI	https://targeted-mpi.eu/
TRIGGER	https://trigger-project.eu/

5.2 References of the identified resources that are not produced by the ATHENA sister projects

Alonso - Albarran, V., Curristine, T. R., Preston, G., Soler, A., Tchelishvili, N., & Weerathunga, S. (2021). *Gender Budgeting in G20 Countries* (N.º 2021/269). IMF WORKING PAPERS.

European Commission. Directorate-General for Research and Innovation (2021). She figures 2021: gender in research and innovation : statistics and indicators, Publications Office, 2021.

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O´Hagan, A., Christensen, E. L., Tilley, H., & Nesom, S. (2019). *Tackling Inequality Through Gender Budgeting: Evidence and Models*. Wales Centre for Public Policy.