



Guidelines for the implementation of the Tailored Action Plans

DRAFT

Tailored Action Plans

The Tailored Action Plans (TAPs) represent a crucial milestone in Genis Lab implementation.

They are a key output of the work implemented in the framework of the collaboration between technical partners and scientific partners in the first 2 years of project activity and represent the basis for the implementation of further steps.

They are crucial in order to achieve the Genis Lab objective of structural change in scientific organizations, since they contain, for each organisation:

- **A synthesis of the results of qualitative gender assessment, focusing on the 3 Genis Lab dimensions (PGAs reports + focus groups/interviews/mapping on Gender budgeting and stereotypes);**
- **the description of the challenges selected for intervention;**
- **the definition of an implementation strategy;**
- **the operational description of specific actions;**
- **provision of quantitative and qualitative indicators for monitoring and evaluation of the process.**

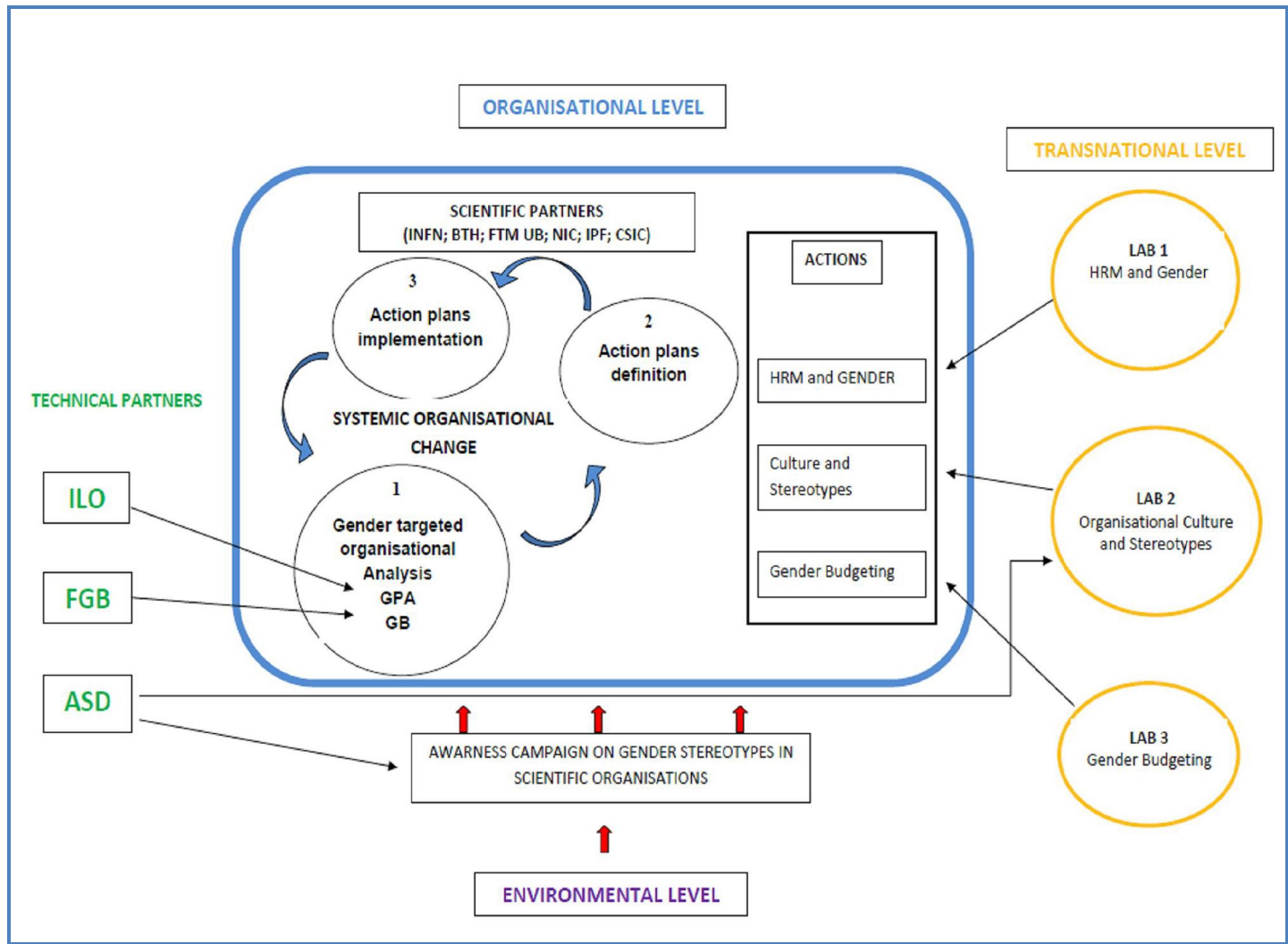
As such, the Tailored Action Plans require a four-step process, combining the three dimensions (HRM, GB and Stereotypes) and the three levels (organizational, social /environmental, transnational and European) identified in Genis Lab.

The four step, as described below, are the following:

- Assessment
- Planning

- Implementation
- Monitoring

Picture 1, included in project proposal, gives a first visual representation of the interrelation existing between the definition of the Tailored Action Plan and the other areas of activity in the project.



It shall be noticed that the fourth step of the TAP process (Monitoring) is missing in this picture.

Picture 1 represents the complexity of Genis Lab’s implementation strategy, which aims to promote structural changes adopting a systemic approach in each scientific organization involving the three different levels.

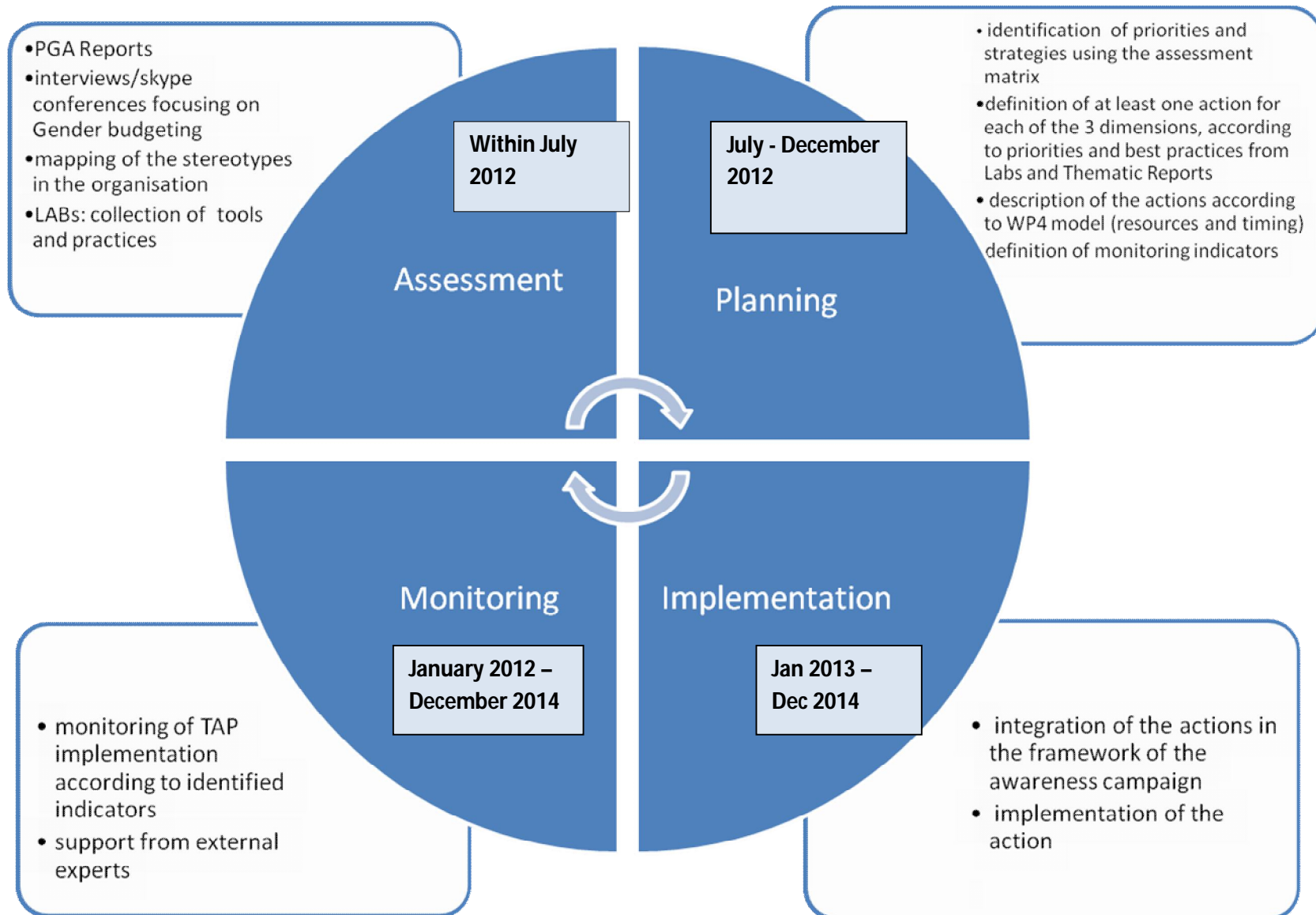
Genis Lab acts on three levels: organizational, social/environmental, transnational/European. The three levels are integrated in a systemic approach in order to face internal and external resistance to change. Promoting change in the scientific transnational and European communities help organizational change in each partners’ organization.

The following table shows a non exhaustive list of actions for each level:

Table 1

LEVEL	Organizational	Social environmental	Transnational and European
Tools/Means	Participatory Gender Audits	Awareness Campaign (Training, advertising, RE Act Theater)	Transnational meetings
	Additional (to PGA) Focus groups		Virtual LABs
	Internal meetings		Project website
	Interviews		Exchange with other networks/projects focusing on women in science and structural change
	Chat		Dissemination (other forms of)
	Activity of Genis Lab teams in the organisations		
	Tailored Action Plans		

Picture 2 shows a detailed representation of the TAP four-step process:



Description of the process

1. Assessment

The Participatory Gender Audits implemented during WP2 and the PGA reports approved by each scientific organization represent the main output of the Assessment phase. They offer a detailed overview on the organizations, focusing mainly on HRM dimension, and identifying a first set of challenges for each organization.

Since in most of the case PGAs need to be implemented with more in-depth investigation from the Gender Budgeting and Stereotypes perspective, additional information was collected by FGB and ADS.

Information was collected via meetings, Skype conferences, e-mail exchange in the period May – August 2012. Travels to visit Scientific Organisation were limited to the cases in which virtual – Skype – communication proves not to be effective.

In order to visualize, share and prioritize collected information an assessment matrix was adopted. The matrix, proposed by FGB and agreed with other technical partners, represents an operational tool for PGA definition and implementation

At the end of this phase each organization has at its own disposal:

- PGA report
- Assessment tools giving a picture of priorities of action in the three areas
- Three thematic reports containing gender effective tools;
- 3 virtual communities (LABs section on the project website) for ongoing exchange.

2. Planning

Moving from the results of Step 1 and using these guidelines as a supporting tool, each organization defines its own TAP.

The process of definition of the TAP starts in September with a transnational seminar, on the 24 and 25 September.

A two-day working session in Turin. .

Each partner is involved **in an individual session** with the three technical partners to finalise the implementation strategy of the TAPs and the description of the actions to be executed in their own organisations.

TAP will be ready for first external evaluation (team of experts) at the end of November 2012.

A preventive approval by organizational decision bodies is requested.

A final version of the Taps should be ready and approved by end of January 2013.

They will contain a detailed description of activities for the period January 2013 – December 2014.

Technical partners support the finalization of the TAPs in the period October-November 2012 through virtual meetings with each scientific partner.

Using the assessment matrix as a supporting tool each action will be clearly defined in terms of:

i. Type of activity - GENIS LAB partners foresee as possible activities in action plans the following:

- Criteria chart definition
- New procedures definition
- Workshops
- Training/learning activities
- New modalities of work implementation (distance working, flexible timing)

ii. Timing

iii. Relevance to identified priority

iv. Expected impact – qualitative and quantitative indicators for ongoing evaluation. **Indicators** will be defined according to State of the art

v. Allocation of resources – economic resources for implementation, internal human resource, physical resources

(ie: dedicated physical spaces within the organisation)

vi. Sustainability after project conclusion

The good practices identified in the 3 **Thematic Reports** together with the information and exchanges registered in the 3 **LABs** are considered source of inspiration for the definition of the TAPs.

Following an example of the TAPs matrix, applied to Gender Budgeting dimension:

Dimension	Subdimension	Item
Funds	Internal funds	Procedure of allocation
		allocation criteria
		Beneficiaries
		Targeted to equal opportunity
	External funds	Source of funds
		Access criteria
		Beneficiaries
		Topic of research
Time	Professor	Research activities
		Managerial – coordinator activities
		Fund raising
		Teaching
	Junior researcher	Research activities
		Managerial – coordinator activities
		Fund raising
		Teaching
Non structured junior researcher	Research activities	
	Managerial – coordinator activities	
	Fund raising	

		Teaching
Space	Office	Professor
		Structured researcher
		Non structured researcher
	Laboratories	Professor
		Structured researcher
		Non structured researcher

For each of the item the scientific organizations wants to work on, the following level of definition is suggested.

Item	Objective	Methods	Process indicators	Results indicators	Output	Responsibility	Time

3. Implementation

The TAPs contain a detailed description of the actions to be implemented in each of the three dimensions.

The Scientific Board composed by 9 international gender and evaluation experts give their feedback and an initial evaluation on the TAPs in the month of December 2012.

The final version of the TAP are approved in January 2013 by managers and heads of unit of each organization and presented to the whole staff in a dedicated seminar. The Genis-Lab consortium considers real commitment of organisational leaders is crucial in determining concrete possibilities for the implementation of action plans. The awareness campaign on stereotypes supports the recognition of the importance of TAPs in the organizations and the commitment of their top management.

Technical partners will support scientific partners in TAP's implementation, on the basis of the agreements following the definition of the TAPs and the resources available in the Genis Lab project. After the presentation of TAPs in all scientific organizations, a transnational conference will be organized in order to promote mutual exchange among partners on their action plans (location and dates to be defined)

Two other partners' meetings will be organized before the final conference in order to share findings emerged by the implementation process and the evaluation reports.

Scientific partners must allocate resources from Genis Lab for the implementation of the process.

4. Monitoring

The implementation of TAP will be object of periodical (each 6 months on a 18 months period) and final assessment against qualitative and quantitative indicators indicated in the action plan.

External evaluation reports will include suggestions and concrete indications for action plans sustainability after project conclusion.

FGB will propose a monitoring and evaluation system, including: definition of evaluation criteria; assessment of project processes, activities and implementation; feedback from Scientific Organisations involved.

Workplan proposal

Type of activity	What	When	Who
Planning	Transnational meeting: two-day working meeting with Scientific partners focusing on: <ul style="list-style-type: none"> - Approval of guidelines for the definition of TAPs; - Definition of <i>roadmaps</i> in each scientific organization leading to the definition of the TAPs; - Sharing of the monitoring tool; - Sharing of guidelines for awareness campaign 	24 -25 September 2012	All partners
Planning	Finalization of the 6 TAPs through virtual (Skype) meetings.	September – October 2012	Scientific partners, with the support of technical partners
Planning	Preventive approval of the TAPs by decision making bodies in each scientific organisation	Mid November 2012	Scientific partners
Monitoring	TAPs will be delivered to the	Mid November 2012	FGB to External evaluators

	Scientific board of external evaluators for a first feedback		
Monitoring	Meeting with Scientific Board in Brussels with the purpose of: - first evaluation of the six TAPs; - feedback and suggestions from the experts on the monitoring evaluation procedure	December 2012	FGB + External evaluators
Implementation	Definite approval of TAPs in each scientific organization, in the framework of dedicated internal seminars. This version of the TAP includes detail on the activities, timing, resources	January 2013	Scientific organizations
Implementation	Transnational Conference, with the aim to promote mutual exchange among partners on their own TAPs	March/April 2013 (location and dates to be defined)	All partners
Monitoring	Each 6 months, each TAP will be object of an assessment against qualitative and quantitative indicators,	June 2013	FGB, ADS, ITC/ILO to scientific partners

	taking as a reference the monitoring tool. The First Monitoring Report will be issued in June 2013		
Implementation	Partners' meeting for sharing views on the implementation of the TAPs, and eventually fine-tuning the process	September 2013 (location and date to be defined)	All partners
Monitoring	Meeting with the Scientific Board in Brussels - Interim Evaluation Report	December 2013	FGB with Scientific Board
Monitoring	Second Monitoring Report	January 2014	FGB, ADS, ITC/ILO to scientific partners
Implementation	Partners' meeting for sharing views on the implementation of the TAPs, and eventually fine-tuning the process	June 2014 (location and date to be defined)	All partners
Monitoring	Third Monitoring Report	June 2014	FGB, ADS, ITC/ILO to scientific partners
Monitoring	Meeting with the Scientific Board in Brussels – Final Evaluation Report	October 2014	FGB with Scientific Board
Implementation	Final Conference in Brussels	December 2014	All partners

Appendix A: Project Keywords

Scientific Partners

Research bodies aiming at improving the gender dimension of research. In Genis Lab they are:

- **CSIC** (Spanish Superior Council for Scientific Research) - Institute for Polymer Science and Technology, Spain
- **IPF** – Leibniz-Institut für Polymerforschung Dresden e.V., Germany
- **INFN** - National Institute for Nuclear Physics, Italy
- **BTH** - Blekinge Institute of Technology, Sweden
- **FTM UB** - Faculty of Technology and Metallurgy, University of Belgrade, Serbia
- **NIC** - National Institute of Chemistry, Slovenia

Technical Partners

Organizations providing expertise on innovative methodologies for gender mainstreaming in science. In Genis Lab they are:

- **FGB** - Fondazione Giacomo Brodolini
- **ITC/ILO** - International Training Centre of the International Labour Organization (Gender Unit), UN Agency
- **ADS** - Associazione Donne e Scienza (Italian women in science organization)

Participatory Gender Audit (PGA)

Participatory Gender Audit Methodology (PGA) developed by ITC/ILO is an audit tool that has been successfully applied in a large number of public and private institutions globally over the last 10 years.

The PGA is a process based on a **participatory methodology** to promote **organizational learning** involving individuals, work units and organizational levels on how to practically and effectively mainstream gender.

PGA as “**social audit**” belongs to the category of “quality audits”, which distinguishes it from traditional “financial audits”. It considers whether internal practices and related support systems for gender mainstreaming are effective and reinforce each other and whether they are being followed.

It establishes a baseline; identifies critical gaps and challenges; and recommends ways of addressing them, suggesting possible improvements and innovations. It also documents good practices towards the achievement of gender equality.

The PGA will lead the identification of strengths and gaps and of existing good and bad practices in relation to the organisations' capacity to tap the full potential of the female workforce, promote a gender balance at all levels and attract and retain the best qualified talents.

The results of the PGA reports therefore provide participating organisations with concrete elements to initiate the gender laboratories and the exchange of concrete gender management tools.

Dimensions

1) Human Resources Management

3) Gender Budgeting: financial choices reflect the dominating culture, as power is created through the concentration of resources. It is then important when addressing gender equality to understand and monitor how resources are distributed and what effects the assignment has on each gender.

2) Organizational culture and stereotypes - Since stereotypes have a fundamental role when dealing with gender issues, GENIS LAB Consortium has decided to dedicate further efforts on this area, considering it as a separate item, interacting with all the others. According to this assumption, we have identified two main areas of intervention regarding the cultural dimension of discrimination: gender stereotypes in science and evaluation criteria.

LABs

The Labs are meant to help scientific organizations to define the Tailored Action Plans in order to implement the challenges /priorities pointed out during the project. All the partners participate in three trans-national laboratories – LABs – hosted on the GENIS LAB website. The three LABs focus on the three dimensions of the project. Each LAB gives the occasion to activate a debate and a learning process within the organisations in order to identify effective gender-management tools, suitable to be included in the TAPs.

Thematic Reports containing gender effective management tools

They are the main output of WP3, and they are mainly based on the activities performed in the gender laboratories in organisational dimensions activated by the consortium, the findings emerged through bilateral discussions among scientific and technical partners, and the 1st thematic workshop held in Belgrade.

The Thematic reports are three and contain effective gender management tools on: Human Resources Management and Gender; Organizational Culture and stereotypes; Financial dimension and Gender budgeting.

Gender Budgeting

The generally accepted definition of Gender Budgeting emerges from the report of the special group of the Council of Europe, which in 2005 reached the conclusion that: "Gender Budgeting is the implementation of Gender Mainstreaming in the budgetary process. This means the valorisation of budgets from the viewpoint of gender, in which case the gender question is taken into account at all levels of the budgetary process with the aim of promoting the equality of women and men".

The overall aim of Gender Budgeting is not the mechanical division of financial means into equal parts or in equal proportion to the existing number of men and women, but rather an overall concept, based on solid analyses, for the financing and distribution of available resources according to the needs of both genders so that they can be used by both men and women, as far as possible equally. If one of the groups is disadvantaged it would be possible to rectify such a situation by equalising measures or to redevelop the specific needs of the given group in this direction.

Such an intention, however, can be fulfilled only in the budget as a whole, not merely in its partial expenditures. The principle of Gender Budgeting contributes on the one hand to the fair distribution of financial resources and on the other hand increases the transparency of budgetary expenses. In the final phase this results in ensuring the maximum efficiency of the means used.

TAP: Tailored Action Plans

The TAPs are the documents containing for each organization:

- A synthesis of the results of qualitative gender assessment, focusing on the 3 Genis Lab dimensions (PGAs reports + focus groups/interviews/mapping on Gender budgeting and stereotypes);
- the description of the challenges selected for intervention;
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- the operational description of specific actions;
- provision of quantitative and qualitative indicators for monitoring and evaluation of the process.

TAP Guidelines

The guidelines support scientific partners in the implementation process of the Tailored Action Plans.

Work packages

Genis Lab uses work packages as tools in order to describe the actions to be implemented in each organization to achieve structural change from a gender perspective.

Indicators

In order to monitor step by step TAPs' implementation and with reference to the state of the art defined within project proposal, indicators are defined in each TAP for each action. Here below, an example of indicators for each dimension:

- 1) Human Resources Management and Gender
 - Policy to support careers for employees with family responsibilities
 - *Did key elements change in the last period?*

- *How did they change?*

2) Gender Budgeting

- Adoption of gender criteria in assigning financial resources
 - *Did it improve in the last period?*
 - *In which areas?*

3) Stereotypes

- Awareness raising activities on gender issues
 - *Have these activities been organised in the last period?*
 - *How often?*
 - *How many participants did they involve? (ratio W/M)*

TAP outline

1. Brief description of Genislab project and members of organization involved in project
2. Objective of TAP
3. Methodology applied to define TAP
4. Gender budgeting: brief presentation of the topic, areas of analysis, actions (matrix and details of actions)
5. Human resources: brief presentation of the topic, areas of analysis, actions (matrix and details of actions)
6. Stereotypes: brief presentation of the topic, areas of analysis, actions (matrix and details of actions)
7. Timetable
8. Monitoring process
9. Sustainability of actions