



EQUAL4EUROPE

GENDER EQUALITY PLANS

Gender Equality Plan for [institution]

D6.1



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FOREWORD

This document contains the **Template for adopting a Gender Equality Plan**, to provide a common working scheme for all partners and offer minimum homogeneity across institutions.

This template has been conceived as an attachment to the **Toolkit for adopting Gender Equality Plans in AHMSSBL research institutions**, therefore, before start using this Template it is advisable to carefully read the Toolkit and before addressing each section of the Template.

Nevertheless, following is the most relevant information regarding the adoption of a Gender Equality Plan.

Content of the Gender Equality Plan

When designing the Gender Equality Plan it is important to remember that there are **objectives and measures that should be included** in the Gender Equality Plan of the different institutions.

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

These requirements are:

- **Publish the Gender Equality Plan** in the institution's website. The Gender Equality Plan should be a public document signed by high management and disseminated within the institution. It should include a commitment to gender equality, set clear objectives and detailed measures to achieve them.
- Provide **dedicated resources** for the design, implementation, and monitoring of the Gender Equality Plan. These resources may include funding for specific positions, such as Equality Officers or Gender Equality Teams, or dedicated working time for academic, management and administrative staff.
- **Collect sex or gender-disaggregated data** as an evidence-base for the Gender Equality Plan. This data should inform the Gender Equality Plan's objectives, indicators, and evaluation of progress.
- Include arrangements for **monitoring the GEP implementation**.
- Organize **training and capacity-building** aimed, in particular, at developing gender competence and tackling unconscious gender bias among staff, leaders and decision-makers, establishing working groups dedicated to specific topics, and raising awareness through workshops and communication activities.
- Include measures addressing **some recommended thematic areas**: (i) work-life balance and organisational culture; (ii) gender balance in leadership and decision-making; (iii) gender equality in recruitment and career progression; (iv) integration of the gender dimension into research and teaching content; (v) measures against gender-based violence, including sexual harassment. Find a list of **best practices and recommendations** for thematic areas (ii), (iii) and (iv) in section 4 of the EQUAL4EUROPE Toolkit for adopting a Gender Equality Plan in AHMSSBL research institutions.



Furthermore, it is important to review applicable **national regulations** to guarantee that all legal requirements are met in the Gender Equality Plan.

Procedure for the adoption of the Gender Equality Plan

The elaboration of the Gender Equality Plan should include a participatory approach where all relevant actors and stakeholders should participate in the elaboration of the Gender Equality Plan, including high management, middle management, academic staff, administrative staff, workers' representatives and students.

An important preliminary step essential for the adoption of the Gender Equality Plan, is to **set-up an Equality Commission or Team**, identified as a temporary working group which coordinates the process of adopting a Gender Equality Plan.

The following checklist summarizes the most common steps that, under different levels of formality, are common to most institutions:

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

See section 2 of the EQUAL4EUROPE Toolkit for adopting Gender Equality Plans in AHMSSBL research institutions for more information.



1. INTRODUCTION

[The introductory section is aimed at providing an overview and the essential information about the Gender Equality Plan adopted in the institution. In this sense, with the aim of providing all essential information regarding the Gender Equality Plan, this first section should include the following information (approximately 1-2 pages):

- What is a Gender Equality Plan and what is its objective (see introduction of the Toolkit to adopt a Gender Equality Plan for AHMSSBL research institutions, p. 6-7).
- Relevant national and/or regional legal framework.
- Process of negotiation, adoption, and implementation of the Gender Equality Plan, including, if this is the case, the parties that participated in this process.
- Date of entry into force of the Gender Equality Plan and period of application.
- Summary of the contents of the Gender Equality Plan, with a brief description of the main objectives, measures, and its structure.
- Commitment of the institution towards gender equality, the integration of gender equality in the organisation and other relevant institutional forms of support of gender equality, including existing measures related with gender equality.]



2. MAIN CONCLUSIONS OF THE GENDER EQUALITY ANALYSIS

[The second section of the Gender Equality Plan has the main function of providing an **overview about the main conclusions of the gender equality analysis conducted** as a preliminary step for the adoption of the Gender Equality Plan.

In this section, you should provide information regarding (4-5 pages):

- The main **results of the analysis** of the sex or gender-disaggregated data collected as an evidence-base for the Gender Equality Plan.
- The most important **gender equality measures** already implemented in the organization.
- The **main areas of intervention and the priority areas for intervention** identified on the basis of the gender equality analysis.]



3. OBJECTIVES OF THE GENDER EQUALITY PLAN

[Define in this section the **main objectives of the Gender Equality Plan**, relating them with the situation of gender equality in the institution described in the previous section.

When defining the objectives of the Gender Equality Plan, please bear in mind the following:

- Objectives should be linked to the situation of gender equality** identified as a result of the gender equality analysis (see above, Section 2).

Following is an example of table that could help present the objectives and their relationship with the diagnosis.

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

- Objectives should be presented as specific, measurable, achievable, relevant and time-oriented (SMART) objectives:**

- **Specific:** brief description of the content of the objective and the results of the work that must be done so that it is clear and observable.
- **Measurable:** include assessable terms when defining the objective, including quantitative measurements (for example, by fixing a percentage or frequency) and/or qualitative measurements (for example, in terms of accuracy or fulfilment with legal regulation). It is essential to identify how the impact of the different measures adopted in the Gender Equality Plan will be assessed in terms of achieving the objective.
- **Achievable:** objectives should be fixed considering the possibility of success in achieving such objective given the time frame, opportunity, and resources available, including budget. In this sense, list existing measures and available resources that will be used to develop the objective.
- **Relevant:** objectives should be aligned with the institution's mission and vision as well as any legal requirement. In this context, the national/local legal requirements and the new HORIZON EUROPE criteria regarding gender equality can be considered when defining the relevance of each objective.



- Time-oriented: objectives must include endpoints, with a specific timeframe or due date for their completion. It is important, however, to also include middle checkpoints or milestones regarding specific tasks within the overall objective.

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

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



4. ACTION PLAN REGARDING GENDER EQUALITY IN [INSTITUTION]

[This section of the Gender Equality Plan will include the **action plan regarding the promotion of gender equality in the institution**. In this sense, it should include a description of all the specific measures adopted in the Gender Equality Plan.

When designing the action plan, please bear in mind the following:

1. Measures should be structured around the **thematic areas identified by the HORIZON EUROPE criteria** (see Section 3.4.1 of the EQUAL4EUROPE Toolkit for adopting a Gender Equality Plans for AHMSSBL research institutions), as well as the **general objective of raising gender awareness**, as included in this template:
 - Removing barriers to recruitment, retention, and career progression for female researchers.
 - Addressing gender imbalances in leadership and decision-making processes.
 - Integrating the gender dimension in research and innovation content.
 - Measures against sexual misconduct, gender-based violence and sexual harassment.
 - Raising gender awareness and engagement with stakeholders.
2. Particular attention must be paid to indicate the **link between the SMART objectives and the measures adopted**. It is important to indicate how measures are the instrument designed to achieve such objectives within the organization.
3. The design of the different **measures should also be SMART** (specific, measurable, achievable, relevant, and time-oriented), indicating the content of the measure, target group, indicators to assess its impact, department responsible and available resources, implementation timeframe, etc.

The gender equality measures can be presented using a table (following is an example) or bullet points:

Name of the measure		
Specific	Content	Brief description of the content of the measure.
	Target	Stakeholder targeted by the measure (for example, high management; middle management; academic staff; administrative staff; researchers; students).
Measurable	Indicators	List and a brief description of the indicators that will be used to monitor and assess the impact of the measure.



Achievable	Responsible department	Name of the department, team, and/or person responsible to implement of the measure (a description of the reasons used for the assignment is advisable).
	Available resources	Available human and financial resources deployed to implement the measure, consider building on existing resources.
Relevant	Objective	Brief explanation of the relevance of the measure to achieve one of the objectives of the Gender Equality Plan.
Time-oriented	Timeline	Timeline for the implementation of the measure, identifying a start and, if applicable, end date.
	Implementation Strategy	Brief description of the implementation strategy for the measure, identifying, if applicable, middle checkpoints or milestones.]

4.1. REMOVING BARRIERS TO RECRUITMENT, RETENTION, AND CAREER PROGRESSION

[Include in this subsection measures aimed at removing barriers to recruitment, retention, and career progression for women. You may consider including in this subsection measures regarding the following issues:

- Recruitment.
- Career progression and promotions.
- Retention.
- Gender pay gap.
- Academic activity.
- Mentoring program.

Consider also to include in this subsection measures for work-life balance and aimed at promoting a gender sensitive organizational culture, among others:

- Discrimination-free and gender-inclusive language policy.
- Childcare provisions.
- Extensive maternity/paternity/parental leave.
- Teaching-free period when returning from maternity/parental leave.
- Extension of temporary contracts of teaching and research personnel if they have been absent due to maternity, paternity and parental leave.]



4.2. ADDRESSING GENDER IMBALANCES IN LEADERSHIP AND DECISION-MAKING PROCESSES

[Include in this subsection measures related with addressing gender imbalances in leadership and decision-making bodies and processes, among others:

- Professional decision-making bodies.
- Academic decision-making bodies.
- Participation in recruitment and promotion committees.]

4.3. INTEGRATING THE GENDER DIMENSION IN RESEARCH AND INNOVATION CONTENT

[Include in this subsection measures related with integrating the gender dimension in research, teaching and innovation content.]

4.4. MEASURES AGAINST SEXUAL MISCONDUCT, GENDER-BASED VIOLENCE AND SEXUAL HARASSMENT

[Include in this subsection measures against sexual misconduct, gender-based violence and sexual harassment.

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

- Training and awareness of all staff.
- Declaration of zero tolerance regarding harassment and violence.
- Include examples of specific actions and conducts that can constitute sexual harassment or inappropriate sexual behavior.
- Adopt a specific procedure to analyze harassment claims characterized by the principles of discretion, impartiality, speed in the investigation, and the possibility to rely on external assistance.
- Allow anonymous claims and complaints, following the EU Directive on whistleblowing.
- Adopt disciplinary measures in cases of harassment and violence.
- Offer support for the reintegration of victims to work.
- Implementation through negotiation with workers' representatives.
- Include measures to prevent sexual harassment, like, for example, trainings for staff.
- Include measures to prevent sexual inappropriate behaviors, that is behaviors that are not sufficiently severe to be sexual harassment, but constitutes and inappropriate sexual behavior.]



4.5. RAISING GENDER AWARENESS AND ENGAGEMENT WITH STAKEHOLDERS

[Include in this subsection measures related with raising gender awareness and engagement with relevant stakeholders, including internal and external stakeholders.]



5. MONITORING, REPORTING AND EVALUATION

[This section of the Gender Equality Plan is dedicated to **monitoring and evaluation of the measures and objectives adopted to assess the progress and impact of the Plan** and the procedure to, if necessary, introduce the appropriate adjustments.]

5.1. PERIODICAL MONITORING AND EVALUATION OF THE GENDER EQUALITY PLAN

[In this section, include information regarding **periodical monitoring and reporting of the Gender Equality Plan**. Although specific tools will be developed at a further stage in the project, provide information on:

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

5.2. INTERPRETATION PROCEDURE AND ALTERNATIVE DISPUTE RESOLUTION

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

In this sense, the following are recommended:

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



5.3. PROCEEDING TO REVISE THE GENDER EQUALITY PLAN

[In this section, provide information regarding the **proceeding to revise the Gender Equality Plan**.

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

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



6. TIMELINE OF THE GENDER EQUALITY PLAN

[Summarize in this section all the information already mentioned regarding the **duration and timeline for the application of the Gender Equality Plan**.

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

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

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



7. DISSEMINATION STRATEGY

[Finally, in this section include information regarding the **dissemination strategy of the Gender Equality Plan**.

Specifically, the following dissemination actions could be included:

- **Publish the Gender Equality Plan in the institution's website.** The gender equality criteria of HORIZON EUROPE Program include the publication of the Plan, signed by high management, in the institution's website.
- **Information campaign among workforce,** identifying different dissemination actions and channels of communication to inform workers about the Gender Equality Plan and specific measures adopted.
- **Training on the implementation of Gender Equality Plans** directed to Gender Equality Officers, relevant management, and staff of each partner institution.
- **Dissemination among external stakeholders.**

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

Table X. Gender Equality Plan's dissemination strategy

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