


Gender Equality Implementation Plans in Business schools

Presentation of Work Package 3 results of the EQUATION project

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<p>EQUATION - EQUality through AccreditaTION</p> <p>Guidelines on Gender Equality Implementation Plan</p>  	<p>Table of Contents</p> <p>The Guidelines on Gender Equality Implementation Plan 5</p> <p>1. Introduction 5</p> <p>2. Conceptual Framework for Gender Equality Implementation Plan 6</p> <p>3. GEP implementation challenges 7</p> <p>3.1. Comparing organizations to gain ideas on gender equality initiatives 7</p> <p>3.2. Resources to gender equality initiatives 8</p> <p>4. Strategies for gender equality implementation initiatives 10</p> <p>4.1. Understanding and Addressing Forms of Gender Resilience 10</p> <p>4.2. The benefits of top-down, bottom-up and co-creating approaches 12</p> <p>4.3. Empowering leaders and change agents 14</p> <p>4.4. Impact Driven model 15</p> <p>4.5. Designing a cross-school national plan 16</p> <p>5. Monitoring 16</p> <p>6. Conclusion 17</p> <p>Annex 1: Gender Equality Implementation Plan Template 19</p>	<p>Guidelines on Gender Equality Implementation Plan,</p> <p>Authors: Tjaša Cankar & Marina Schmitz, IEDC-Bled School of Management</p> <p>July 2024</p>
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Conceptual framework

- Gender equality in research and innovation remains a key goal across the EU, yet implementation often falls short despite widespread regulations.
- Efforts like **gender mainstreaming** have attempted to innovate equality policies, but structural barriers within institutions often remain intact.
- Systemic approach that adapts Gender Equality Plans (GEPs) to specific institutional contexts.
- The **Guidelines on Gender Equality Implementation** offer two key objectives:
 - Promote structural change through sustainable, tailored GEPs.
 - Develop context-specific actions that reflect local needs.

A subsequent, complementary action plan to the overarching GEP or other current gender equality strategies.



What is a gender equality plan?

- Plan how to address problems related to gender equality within one institution/organization
- Plan made for own needs: **needs assessment analysis**
- **Set of actions:** list of actions or problems to be addressed
- Timeframe, Responsible persons
- A public document with which employees are familiar → **dissemination & feedback**
- Several people from different departments within the institution are involved in the implementation of the plan

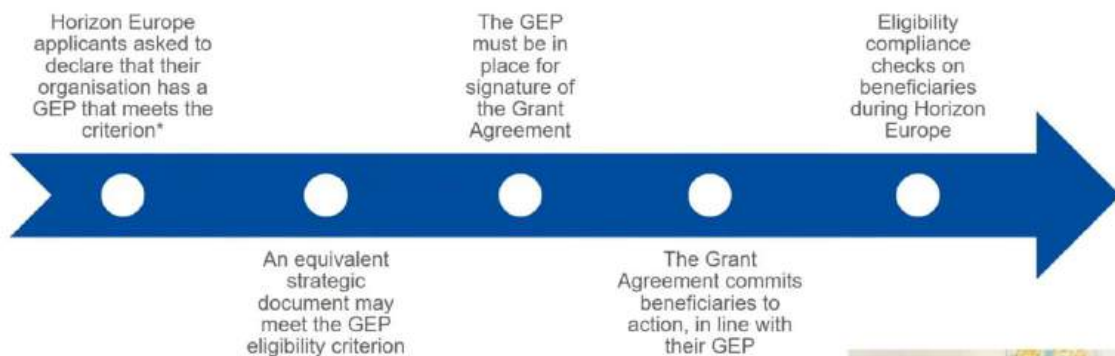


New eligibility criterion for Horizon Europe funding

- Organizations applying for Horizon Europe tenders must have a gender equality plan.
- The condition has come into force with tenders in 2021, and it is a **necessary condition from 2022**.
- Applies for applicants that are a **public institution**.
- Exceptions: small and medium-sized enterprises, non-governmental organizations.

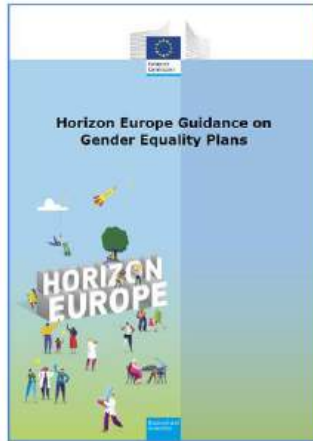


The eligibility criterion steps



EUROPEAN COMMISSION activities on GEPs

Main guiding document by the EC (2021)



"This Guidance supports organisations to meet the Gender Equality Plan (GEP) eligibility criterion of the Horizon Europe Framework Programme for Research and Innovation 2021-2027. For Horizon Europe calls for proposals with deadlines in 2022 and beyond, applying public bodies, research organisations and higher education institutions, from EU Member States and associated countries, **must have a GEP or equivalent strategy in place to be eligible for funding**. This Guidance presents the components of the eligibility criterion as set by the European Commission, explains what these requirements mean in practice when developing and implementing a GEP or reviewing the equivalence of existing plans or policies, and provides concrete practical examples, building on existing materials, good practices and various resources that support gender equality in research and innovation (R&I) at national and institutional levels."



What does it include?



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Mandatory GEP process requirements



Public document

- Formal document
- Signed by top management
- Published on the institution's website
- Disseminated through institution



Dedicated resources

- Funding for gender equality positions or teams
- Reserved time for others to work on gender equality



Data collection and monitoring

- Data on sex or gender of staff across roles and leadership
- Annual reports and evaluation of progress and outcomes



Training and capacity building

- Whole organisation engagement
- Tackle gender biases of people and decisions
- Joint action on specific topics

Publication and Official Endorsement of the GEP

Publication on the organisation's website

Signature by Senior Leadership

Internal Communication

Regular Progress Reports



Dedicated Resources

Dedicated Gender Equality Function

Wider Staff Engagement

Gender Budgeting



Training

Unconscious bias training for all staff and leaders

Communications and engagement activities with all staff

Inclusion into research and teaching

Further gender equality training



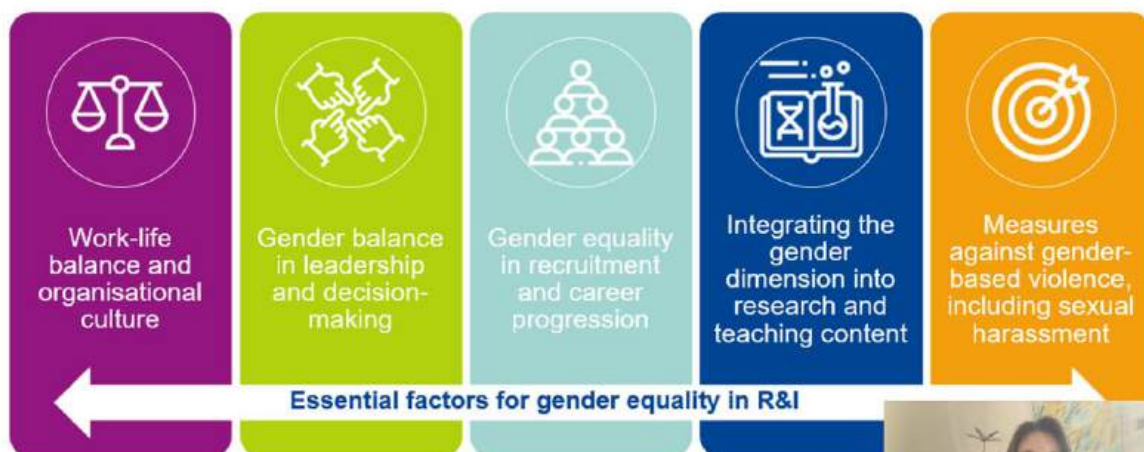
Data collection and monitoring

Data Collection

Indicator Selection

Data Analysis

Publication and Annual Monitoring



Summary of recommended areas



Work-Life Balance and Organisational Culture

- Develop flexible work policies that accommodate different needs.
- Promote a culture that values diversity and inclusivity through regular awareness programs and training.
- Implement regular surveys to monitor staff satisfaction and identify areas for improvement.

Gender Balance in Leadership and Decision-Making

- Set clear targets for gender balance in leadership positions and decision-making bodies.
- Create mentorship and leadership development programs specifically for underrepresented genders.
- Regularly review and adjust recruitment and promotion processes to remove bias.



Measures Against Gender-Based Violence, Including Sexual Harassment

- Develop a clear policy against gender-based violence and harassment, with defined procedures for reporting and addressing incidents.
- Provide regular training for students, staff, and faculty on recognizing, preventing, and responding to harassment and violence.
- Establish a confidential support system for victims, including counseling and legal assistance.

Gender Equality in Recruitment and Career Progression

- Establish transparent criteria for recruitment and promotion that prioritize merit and potential.
- Implement unconscious bias training for all involved in the hiring process.
- Support career development opportunities for all genders, with special attention to underrepresented groups.

Integrating the Gender Dimension into Research and Teaching Content

- Encourage the inclusion of gender studies in the curriculum across departments.
- Provide training for staff on how to integrate gender perspectives into their teaching and research.
- Fund research projects that focus on gender issues or promote gender equality.

Resistances to GEP

- Lack of **support from the leadership**
- Lack of **funding / absence of adequate resources** (happens after EU project ends)
- Lack of **institutionalisation**
- **Resistances** at the intermediate level
- Organisational resistances due to **gender-blind bureaucracy**
- Adverse attitude towards understanding the gendered character of scientific culture
- The argument of objective **meritocracy**



Annex 1

Gender Equality
Implementation Plan Template



Example of setting a goal in a GEIP

Diagnosis	There is no institutional department or reference point for issues regarding gender equality, work-life balance and worker's rights.
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GOAL:

Setting-up rules for flexible working hours and remote work and publishing them (on the intranet).



- detailed activities/measures,
- indicators
- target group
- persons in charge
- timeline



Example of setting a goal in a GEIP

Areas of Gender Equality	No.	Goal	Activities	Indicator	Persons in charge	Time	Assessment	Justify / explain assessment
1. WORK-LIFE BALANCE AND ORGANISATIONAL CULTURE	1,1	Supporting work-life balance by setting-up rules for flexible working hours and remote work.	1. Developing rules.	Set and published rules for flexible working hours and remote work.	GE&D workgroup.	By 2024.	In progress	Time and persons in charge specified too vague, need more specification and responsibility allocation.
			2. Publishing rules (on the intranet).					
			3. Providing clear information to faculty, staff.					



Example of how to develop and specify a goal in a GEIP

Goal	Future plan	Activities	Persons in charge	Time
Supporting work-life balance by setting-up rules for flexible working hours and remote work.		1. Reviewing existent rules on work-life balance in your institution. 2. Organising discussions/interviews with staff to assess what they need. 3. Developing rules. 4. Negotiating with leadership. 5. Finalizing the rules. Publishing rules (on the intranet). 7. Providing clear information to faculty, staff.	HR department, researcher in GE/diversity, gender equality officer, representative of leadership.	By 2024. 1. May 2024: reviewing existent rules. 2. June 2024: organise discussion with various groups at the institution: faculty, admin, students. 3. July: Developing rules. 4. September 2024: Negotiate with leadership. 5.+6. October: Finalize the rules and publish rules on the internet. 7. November 2024: Organise discussions and disseminate information to staff.



EUROPEAN COMMISSION checking GEPs

Compliance Check Pilot (2024)

EC has randomly chosen 29 institutions and is currently in the final stages of checking whether they comply to the criteria set for GEPs.



Compliance Check Pilot

On the basis of this pilot project the EC will **annually check** the consistency of the institutions' statements on GEPs.

Penalties:

If the recipient will not meet the conditions, it will mean that the institution:

- **no longer be allowed to participate** in the projects,
- **ongoing projects and resources will be suspended**,
- **refunding of budget received**,
- if the non-compliant institution is a coordinator, it can affect the whole consortium.



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Conclusion

- Each organization makes its Gender Equality Plan based on the analysis of the situation in its organization.
- This requires the systematic collection of data (disaggregated by sex/gender) on the institution's employees and students.
- Merely copying "good practices" from elsewhere will not suffice (inspired by best practices).
- The organization must invest resources (time, money, professional expertise in GE) to create the plan.





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A School with a View

