RESET

# Redesigning Equality and Scientific Excellence Together

RESET
Redesigning
Equality and
Scientific
Excellence
Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

# Project Information

| Topic: | SwafS-09-2018-2019-2020 Supporting research organisations to implement gender equality plans |
|---|---|
| Funding Scheme: | EU H2020 - Coordination and Support Action |
| GA Number: | 101006560 |
| Start date: | 01/01/2021 |
| Duration in months: | 48 |
| Project Coordinator: | UNIVERSITE DE BORDEAUX |

RESET aims to address the challenge of Gender Equality in Research Institutions in a diversity perspective, with the objective to design and implement a user-centered, impact-driven and inclusive vision of scientific excellence.

## Consortium partners

université de BORDEAUX   ARISTOTLE UNIVERSITY OF THESSALONIKI   UNIVERSITY OF LODZ   U. PORTO

RUHR UNIVERSITÄT BOCHUM RUB   UNIVERSITY OF OULU   SciencesPo

# Comprehensive gender equality and gender mainstreaming training toolbox useful for different trainee groups or national contexts

# Document Information

| | |
|---|---|
| **Title** | Developing a comprehensive programme and teaching templates (guidelines/workshop syllabi) adaptable for different trainee groups and diverse social-cultural and national contexts |
| **Deliverable No.** | D4.2 |
| **Version** | 1.0 |
| **Type** | ☑ Report ☐ Demonstrator ☐ ORDP ☐ Ethics ☐ Other ☐ Report |
| **Work Package** | 4 |
| **Work Package Leader** | UL |
| **Issued by** | UL |
| **Issued date** | 20.12.2022 |
| **Due date** | 31.12.2022 |
| **Dissemination Level** | ☑ Public ☐ Confidential<br>*only for members of the consortium (including the EC)* |

| Main Authors | |
|---|---|
| **Name** | **Organisation** |
| Mateusz Hauk | University of Lodz |
| Aleksandra Różalska | University of Lodz |
| Agata Rudnicka | University of Lodz |

| Quality Reviewers | |
|---|---|
| **Name** | **Organisation** |
| Marion Paoletti | University of Bordeaux |
| Maryna Radchuk | University of Bordeaux |
| Viktoria Niebel | Ruhr University Bochum |
| Tuija Lämsä | University of Oulu |

# Abbreviations

| | |
|---|---|
| **D&I** | Diversity and Inclusivity |
| **DT** | Design Thinking |
| **ERG(s)** | Employee Resource Groups |
| **GE** | Gender Equality |
| **GEP** | Gender Equality Plan |
| **GIA** | Gender Impact Assessment |
| **GIL** | Gender Inclusive Language |
| **HEI(s)** | Higher Education Institution(s) |
| **JD-R model** | Job Demands-Resources Model |
| **KPI(s)** | Key Performance Indicator(s) |
| **M&A** | Mergers and Acquisitions |
| **NVC** | Nonviolent Communication |
| **PDCA** | Plan Do Check Act |
| **Q&A** | Question and Answer |
| **R&I** | Research and Innovation |
| **RESET** | Redesigning Equality and Scientific Excellence Together |
| **SMART** | Specific Measurable Acceptable Realistic Timely |
| **STEM** | Science, Technology, Engineering, Mathematics |
| **TA** | Transactional Analysis |
| **WLB** | Work-life Balance |
| **WP** | Work Package |

# Executive Summary

This deliverable, corresponding to the task "Developing a comprehensive programme and teaching templates / guidelines / workshop syllabi adaptable for different trainee groups and diverse social-cultural and national contexts"), constitutes a second step in developing a comprehensive and universal training scheme for the RESET consortium within WP4 "Train communities towards equality and settle new standards". In general this WPs aims to provide tailor-made training for GEP-implementing RESET partners and particular target groups in each institution (PhD candidates, teachers/researchers, HR, administrative staff, middle management, top management).

All WP4 tasks and deliverables are based on the assumption that training should be cumulative and derived from the already existing training resources created at both European and national levels. In addition, all WP4 deliverables are closely connected with each other and mutually interdependent. Hence, D4.2 "Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts" results from the previous D4.1 "Report on specific training needs of each partner university and the presentation of the existing training programmes/courses/workshops", which reviewed firstly training activities developed in previous and ongoing EU-funded sister projects and secondly the existing training opportunities at each GEP-implementing university (U.Porto, UBx, AUTh and UL).

The aim of D4.2 is to design a toolbox, adaptable to various national, institutional and socio-cultural contexts and to the diversified needs of the RESET partners. Addressing all stakeholders and profiles, in line with the intersectionality and co-design approaches, the toolbox will enable both project-scale and context-specific applications. The overall goal of the training is to engage the whole university community in creating an academic culture of equality, beyond the affected groups (according to an inclusive approach).

The deliverable 4.2 consists of three main parts: introduction, the section with eight training modules and conclusions.

Part 1 is an introduction to the toolbox, wherein we explain the overall logic of the toolbox, the relationship between all WP4 deliverables and the ways in which the toolbox is connected to other RESET WPs and deliverables as well as how the authors applied the underlying RESET methodologies and concepts: intersectionality, co-design and scientific excellence. In this introductory part we also propose how the toolbox can be used according to the train-the-trainers approach and refer to possible resistance that training on GE and diversity may evoke among the academic community. In addition, an overview of teaching methods used in the toolbox is provided: among others, tool coaching, Balint group and action learning as well as design thinking. We also offer two proposed plans of training and learning paths to be chosen by participants.

Part 2 contains eight training modules, which have been developed in collaboration with RESET partners: 1) Psychosocial risks at work – aggression, mobbing and sexual harassment; 2) Reacting to harassment and inappropriate behaviours; 3) Diversity and inclusivity,

4) Enhancing diversity and inclusivity culture & preventing discrimination and unconscious bias; 5) Building positive relationships and enhancing positive attitudes toward diversity at work; 6) Work-life balance – orientation on knowledge competencies improvement; 7) GEP implementation; 8) Gender and diversity dimensions in research and teaching (including GIA and intersectionality).

Each module has the same structure and consists of the following elements: goal, participants, recommended and basic forms of training, duration, main and specific objectives, learning outcomes and educational effects, learning areas, useful references, methods and training activities, tailor made training for each university, useful terms and definitions, practical tips and guidelines.

While preparing the modules, we used the reports, deliverables and accumulated knowledge from other RESET WPs as well as sister projects:

- **SUPERA** (Supporting the Promotion of Equality in Research and Academia): https://www.superaproject.eu/
- **GE Academy** (Gender Equality Academy ): https://ge-academy.eu/
- **GENDER-NET** (Promoting  Gender Equality in Research Institutions and Integration of the Gender Dimension in Research Content): http://www.gender-net.eu/?lang=en
- **GENDER-NET Plus** (Promoting Gender Equality in H2020 and the ERA): https://gender-net-plus.eu/)
- **ACT** (Promoting Communities of Practice to Advance Knowledge, Collaborative Learning and Institutional Change on Gender Equality in the European Research Area): https://act-on-gender.eu/

Part 3 includes some concluding remarks as well as links to previous and subsequent WP4 tasks and deliverables. In particular, we refer to some recommendations proposed in D4.1 that we applied while preparing the toolbox and we set agenda and actions for further work on training within the RESET project.

We need to acknowledge the enormous work on this toolbox of not only the WP4 team from the University of Lodz, but also contributions of all RESET partners. We would like to especially thank the mentoring universities (OULU and RUB) and SciencesPo (monitoring and evaluating partner) for their assistance, remarks and consultation throughout the process of creation of this deliverable.

# Table of contents

# 1. Introduction

## 1.1. The toolbox in relation to other WP4 tasks

The toolbox has been developed as the second task of WP4 "Train communities towards equality and settle new standards". It results from the outcomes of the analysis conducted at the previous stage of the project (D4.1) among the GEP-implementing consortium partners regarding the training needs of different HEIs stakeholders.

Within D4.1 the data collection process was multi-staged, including quantitative and qualitative methods, with the aim of obtaining a comprehensive picture of educational and training expectations in each partner university. Moreover, when preparing the first deliverable, analysis of other courses and training schemes addressing gender equality and diversity issues from similar EU projects was taken into account in order to deliver an additional value to the final version of the toolbox.

D4.1 included a set of recommendations for the toolbox (D4.2), both in terms of the methods that should be used (with regards to RESET key approaches, i.e., co-design, intersectionality and gender perspective on scientific excellence), and the format of training as well as the content of training modules.

The logic of the WP4 four deliverables and their multiple interrelationships is presented on the graph below:

| D4.1. | Identification of the training needs using the co-design method, the results of sister projects and national survey data reports (WP1, D1.2) / Recommendations for toolbox design and methods |
|---|---|
| D4.2. | Designing toolbox / Division into eight modules using the co-design method and the results of sister projects / Including other WPs results in the modules / Identifying learning aims and results |
| D4.3 | Providing content to the toolbox developed in D4.2 / Supplementing the toolbox with teaching templates, materials, handouts and exemplary exercises / Preparing webinars using the co-design method / Making the toolbox available online for the general public |
| D4.4 | Conducting pilot training sessions using the toolbox developed in D4.2 and D4.3 / Providing train-the-trainers sessions to GEP-implementing partners |

*Figure 1: WP4 deliverables in RESET*

The graph below refers to the second phase (D4.2) and illustrates the subsequent steps taken in the process of co-designing the training toolbox:

Data collection from the project consortium

Exemplary EU projects' training analysis

Brainstorming with the project consortium about the list of topics of modules

Merging the proposed topics into modules
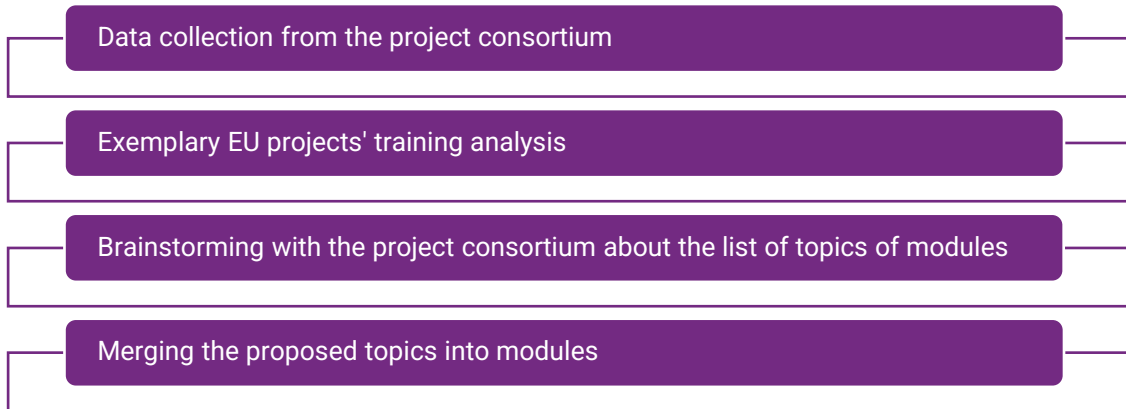
*Figure 2: The process of choosing the main training areas*

Ultimately, eight main training areas were selected, which reflect the training needs of GEP-implementing universities with regards to developing knowledge and building gender and diversity awareness. These topics include:

Psychosocial risks at work
– aggression, mobbing and sexual harassment

Reacting to harassment and inappropriate behaviours

Diversity and inclusivity

Enhancing diversity and inclusivity culture; preventing discrimination and unconscious bias – orientation on knowledge and skills competencies improvement

Building positive relationships
and enhancing positive attitudes toward diversity at work

Work-life balance
– orientation on knowledge competencies improvement

GEP implementation

Gender and diversity dimensions in research and teaching
(including GIA and intersectionality)

These areas cover issues that are challenging and demand more attention in partner institutions. For GEP-implementing organisations, these are also topics that the academic community should become familiar with due to the lack of such a training provision.

Importantly, all participants are invited to take part in all development activities, which each of these topics covers, or choose such subjects that are most suitable for their university. Nevertheless, we recommend the specific structure and order of training areas that - from our perspective – are the most logical and useful.

## 1.2. Train-the-trainers approach

The document is designed as a training toolbox for trainers, HR offices or other units dealing with gender equality at HEIs and – together with the next WP4 results – it will provide comprehensive training material accessible to everyone interested in organising and running pedagogical activities at the higher education level.

**The train-the-trainer approach** aims to strengthen the necessary skills and capacities of the future trainers/instructors in order for them to organise and conduct the training sessions within the eight modules proposed in this toolbox in their university or in other HEIs. The toolbox shows the participants how to successfully deliver training materials and content to other employees of their organisation and various groups of learners. Trainers will be equipped in the necessary knowledge on GE and diversity as well as competencies to change the employees mindset/attitudes and dealing with potential resistance and contention (see section 1.4 below). After the toolbox will be further developed as part of D4.3, trainers will receive the ready-made training templates, materials and scenarios tailored to the specific needs of their GEP-implementing institution. They will learn not only how to run training sessions using innovative methods and encourage participatory engagement of trainees, but also how to give feedback, facilitate self-reflection and raise awareness. Since one of the main aims of this toolbox is to enhance coping/counteracting mechanisms to discriminatory processes and inappropriate behaviours, the trainers will learn how to boost the confidence of the participants in dealing with stereotypes and various forms of discrimination, reacting to harassment as well as advancing positive attitudes toward diversity at work. Finally, the trainers will share with future instructors good practises and practical solutions on GE-related activities and policy-making at the university, such as the implementation of GEPs and introducing gender and diversity dimensions to research and teaching.

## 1.3. The toolbox in relation to other RESET WPs and deliverables

The modules listed above have been designed using the methodologies and concepts explored and analysed by the whole RESET project, in particular:

**Co-design approach** (D9.2 "Co-design starter kit")

**Intersectionality** (the approach used throughout the project, in particular in WP1, WP2, WP5, WP6, WP7, WP8)

**Scientific excellence from the gender perspective** (WP6: D6.5 "Joint statement of top-management on their engagement for equality, diversity and excellence in research")

**Work-life balance** (WLB) (WP1: D1.2 "GE Survey Data Reports", D1.3 "GEPs 1.0" and D5.6 "Media campaign 'Faces of Campus'")

**Gender-inclusive language (GIL)** (WP5: D5.4 "Toolbox for gender-neutral, diversity oriented institutional communication")

**Gender Impact Assessment (GIA)** (WP7: D7.1 "Gender Impact Assessment (GIA) guidelines" and D7.2 "GIA checklist and protocol in all project languages")

**Gender Equality Plan (GEP)** (WP1: D1.3 "GEPs 1.0")

**Co-design approach** is considered an innovative, grassroot and diversity-friendly methodology, well-suited to the needs and specificities as well as the cultural and socio-political contexts of each GEP-implementing university. It is helpful in successfully addressing the challenges with regards to gender equality and diversity in HEIs. In the D9.2 "Co-design starter kit" it is emphasised that "mainstreaming this approach as an institutional practice for efficient gender equality policy-making and greater stakeholder engagement and support, will underpin high-quality and high-impact actions". Moreover, "maximum impact is ensured through target-specific approaches: for doctoral students, researchers, middle management, top management and administrative institutional services", which is the perspective we also adopted in this toolbox as we include all these stakeholder groups in the training offer.

Additionally, co-design is used both as a practice to plan and implement RESET-related activities throughout the consortium and as an internal method to introduce institutional change and GE policies in GEP-implementing universities. In this sense, it enables each HEI "to politically frame and sustainably implement gender and diversity-friendly practices in the work environment". In the context of WP4 it has been especially important to apply the co-design approach both at the project level as well as internally (training activities are included in all the GEPs prepared within RESET and they have been consulted/co-created with e.g., Gender Equality Boards, science units, HR units, etc.). The co-design methods will be further used in D4.3 to include the perspective of students and strenghten the gender and diversity dimensions in teaching curricula and course syllabi.

**RESET** Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

**Scientific excellence from the gender perspective** is the underlying concept of the whole RESET project, which offers a novel understanding of and approach to progressive change of the criteria of excellence in research. They include: "recognition, multidisciplinarity, open access, intersectionality, responsible research and innovation as well as societal impact". In D6.5 "Joint statement of top-management on their engagement for equality, diversity and excellence in research", the RESET consortium declared that all academic stakeholders ought to "participate in the competition for excellence, regardless of their social characteristics", which is rooted in "the principles of gender equality and diversity, according to which all individuals should have the same opportunities, regardless of their sex, gender, sexual orientation, nationality and ethnicity, the fact of having disability, their religion, social background or even culture".

Clearly, such an approach is connected with the main methodology of the RESET project, i.e., **intersectionality**. It has been used in many disciplines as an approach to minority experiences, diversity and unequal power relations in societies and institutions. Intersectionality is understood as "an ongoing, dynamic process" and the proponents of this theoretical framework "assert that there are never distinct and single factors that create privilege or oppression but social categories shift in their meaning, depending on social context, relationships and interactions of individuals with one another" (Woods, Benschop and van der Brink 2021, 3). Each WP includes the intersectional framework in its activities because – as stated in D5.4 – "RESET aims to reveal the overlapping of inequality, especially in HEIs, and counteract it with measures, acknowledging intersectionality as 'the intellectual core of diversity work' (Dill 2009, 229)". Therefore, the intersectional perspective on gender (in)equality and diversity was applied to data collection and survey developed by WP1 (D1.2), in the design of GEPs 1.0 (D1.3), in the preparation of the Gender-inclusive language toolbox (D5.4) and while (re)defining the concept of scientific excellence within WP6. WP4 also uses intersectionality both as a tool to talk about the overlapping axes of discrimination and power relations in HEIs as well as a concept facilitating training on diversity and inclusivity. Intersectional perspective will be also applied while proposing concrete materials and solutions of how to introduce the gender/diversity dimensions in everyday teaching experiences.

All the above-mentioned deliverables on GIL, GIA, WLB and GEPs are included in particular modules of this toolbox and – in a co-design manner – will be referred to while creating further content for WP4's training offer.

## 1.4. Change of employees' mindset and dealing with possible resistances

As mentioned above, the toolbox intends to provide a set of training templates and guidelines supportive of mainstreaming and enhancing the desired attitudes at HEIs by sensitising, recognizing and eliminating inappropriate and discriminatory behaviours. The toolbox is meant to strengthen the possibilities of building a diverse and inclusive academic community as well as helping to establish attractive training schemes to facilitate the process of GEP implementation.

Taking into consideration that the process of familiarisation with any phenomena and constructs is complex and requires different educational tools and formats, we propose a competencies-based training system. The competencies that learners are expected to gain in order to be able to use them in professional life and work relations combine three different dimensions: attitudes, skills and knowledge.

Such a competencies-based training system aimed at real change **requires some effort from participants and is time-consuming.** On the one hand, this might be perceived as a kind of drawback of our approach. On the other hand, **real change in attitudes and behaviours** (which can constitute a huge change of status quo for participants) is possible only when the participants will have **the chance to focus on chosen subjects, exchange reflections and opinions, become familiar with the phenomena** and – more importantly – **get the chance to test themselves and hone their skills working on real cases from their work environment.**

Such an approach and asking people to take part in long-lasting development activities may cause some kind of reluctance and resistance, so it is worth remembering that this process will be connected with some typical psychological defiance reactions. Notably, we need to remember that every change (no matter whether desired or not) includes some stages, which have to be passed through.

Referring to Kübler Ross' Change Curve Model (Kübler-Ross, 2014; Savolainen, 2016), which proved its utility in corporate and institutional world, we may say that employees might go through 5 stages of personal transition, i.e., denial, anger, bargaining, depression, acceptance.



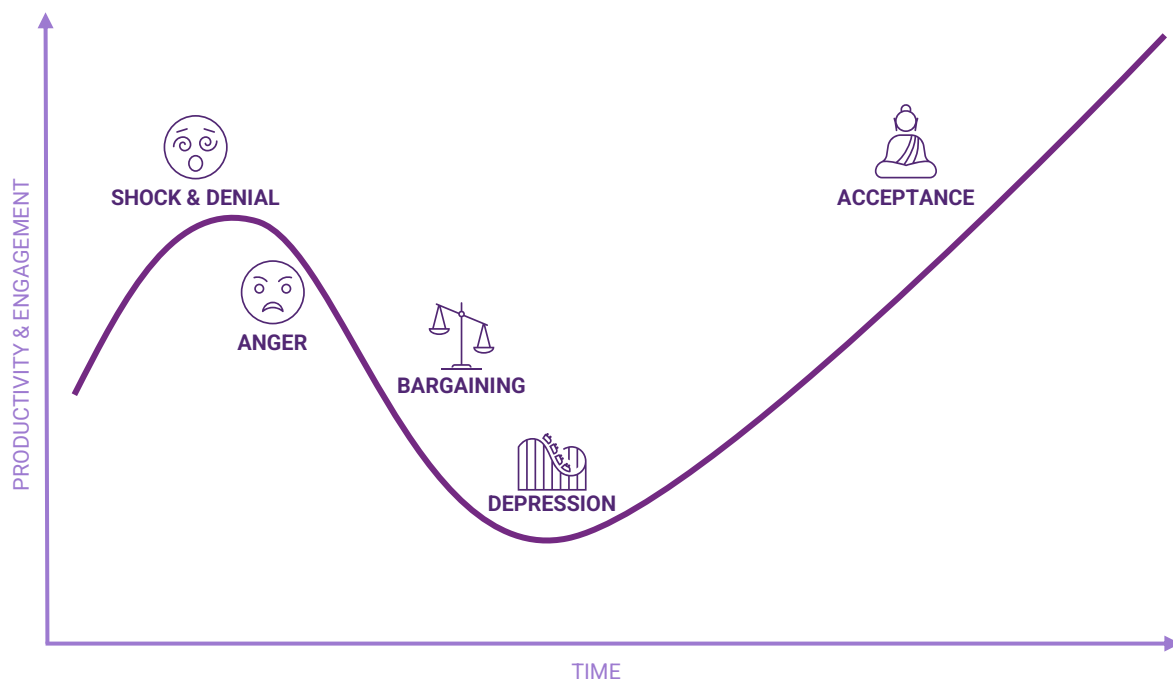*Figure 3: The Kübler-Ross Change Curve*

While inviting people to change to a more diversity- and equality-driven mode of being, one may expect these phases to occur. What is more, when establishing development activities and asking people to take part in them, one may encounter some denial, reluctance and refusal (as we mentioned above), especially when the planned activities take time and effort.

Below there are some useful guidelines and ways to cope with resistance at the very first step:

- Show the participants the possible benefits of participating in development activities.
- Show them the possible risks of not taking part in development activities and not adapting to change that is currently happening.
- Show them the inevitability of change.
- Show the importance of the participants in this development process and the possibility of their influence on the change.
- Ask them about possible difficulties and obstacles that can prevent them from being fully engaged in the development process and optimal solutions, which they can figure out on their own.

Of course, in the above-mentioned interventions you need help from other people from your university, who are engaged in the process of establishing the change of work environment (especially from authorities who should set an example and highlight the importance of this programme, as well as from communication departments and the top management and executives).

We are aware that apart from participating in our RESET project, the participants have to fulfil other responsibilities and tasks, which are extremely important from scientific and administrative points of view. Thus, we propose a recommended approach for training sessions, leaving trainers to make the decision regarding which modules they will use and how they will proceed with organising the training. They should feel free to choose these elements of our toolbox that most suit them and their colleagues and co-workers, taking into consideration their current work obligations and their attitudes to training.

Every module also contains a basic form of training that can be a good starting point for engaging participants and equipping them with basic knowledge and tools in the area of gender equality, diversity and inclusivity.

Furthermore, selected modules of this toolbox will be supplemented with a short (1-1.5h) recording of a webinar. We believe that these webinars can help to meet the expectations and needs of those people, who have no time to take part in long-lasting activities or even basic forms of training. In this way they will be able to develop their skills in an asynchronous way.

These training modules are intended to be developed within partner universities first on an optional basis for the whole academic community before moving towards the mandatory in GEP 2.0.

## 1.5. Methods and methodologies used in the toolbox

In order to enhance the real change for/among universities' employees (concerning attitudes, skills and knowledge), when preparing the toolbox we decided to create programmes that use multiple methods directed to improve competencies (on the above-mentioned three dimensions) of the participants. Below you will find a list and description of the methods used.

### TOOL COACHING

**Objective:**

- supporting the participants in dealing with real, difficult situations
- getting detailed feedback from other participants
- honing skills that enable participants to cope with common difficulties

**Structure:**

- Trainer moderates the meeting.
- The group's work begins with collecting a list of difficult situations of the participants.
- The group choose a situation for further work:

1. Diagnostic staging: possible recordings of the conversation.

2. Analysis of staging in terms of strengths and areas for improvement.

3. Gathering feedback from participants and building a pool of guidelines for this type of conversation /situation.

4. Building a conversation algorithm with the theoretical background set by the trainer.

- Every participant trains the algorithm in smaller groups.

See also:
Gut, J., Haman, W. (2015). *Psychologia szefa. Tom 1. Szef to zawód.* [*Boss psychology. Volume 1. Boss is a profession*]. Helion Publishing House.

## BALINT GROUP AND ACTION LEARNING

**Objective:**
- supporting the participants in the difficult situations they experience
- strengthening the change and application of the tools and solutions discussed during the workshops

**Structure:**
- The group's work begins with the presentation of the work logic using the Action Learning method.
- Trainer moderates the meeting.
- A person who wants to get help or consult something presents a case according to the scheme:

1. Presentation of the situation by the Participant. Formulating a question or a dilemma to be solved (up to 15 min).

2. Questions from the group to clarify the understanding of the situation – the participant answers the questions (up to 20 min).

3. Hints and suggestions for the Participant from the group. Sharing the understanding of the situation and experiencing difficulties. Creating a pool of possible solutions, advice and suggestions (up to 15 min).

4. The Participant summarises the advice he/she/they heard and decides whether and to what extent he/she/they wants to do something with them (e.g., practice, ask for an explanation etc.)

- This cycle repeats with reference to other participants and their difficult situations.

See also:
https://balint.co.uk/about/the-balint-method/
Cho, Y. (2009). Action Learning Research: A Systematic Review and Conceptual Framework. *Human Resource Development Review* 8:431-462.

## BUBBLE DIALOGUE METHOD

**Objective:**
- increasing the knowledge and awareness of participants of specific phenomena
- encouraging the participants to exchange ideas and finding solutions to difficult situations

**Structure:**
- Trainer moderates the work with group

1. The group's work begins with playing a fragment of the video with particular scenes (e.g.,: aggression and psychological violence).

2. The captured fragments of video serve as a trigger to a discussion among participants

3. They can also serve as a contribution to role-playing:
- What should be done in such cases?
- How to behave?
- Do similar situations occur in your organisation (what is similar, what is different)?

See also:
Chomczyński, P. (2008). *Mobbing w pracy z perspektywy interakcyjnej. Proces stawania się ofiarą [Mobbing at work from an interactive perspective. The process of becoming a victim]*. Publishing house of the University of Lodz.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## DESIGN THINKING

**Objective:**

• figuring out the solutions to complex problems and difficult situations

**Structure:**

1. Discover: Understand the challenge/problem

2. Interpret: Search for meaning and insights

3. Ideate: Generate ideas

4. Experiment: Test assumptions

5. Evolve: Consider where to go next
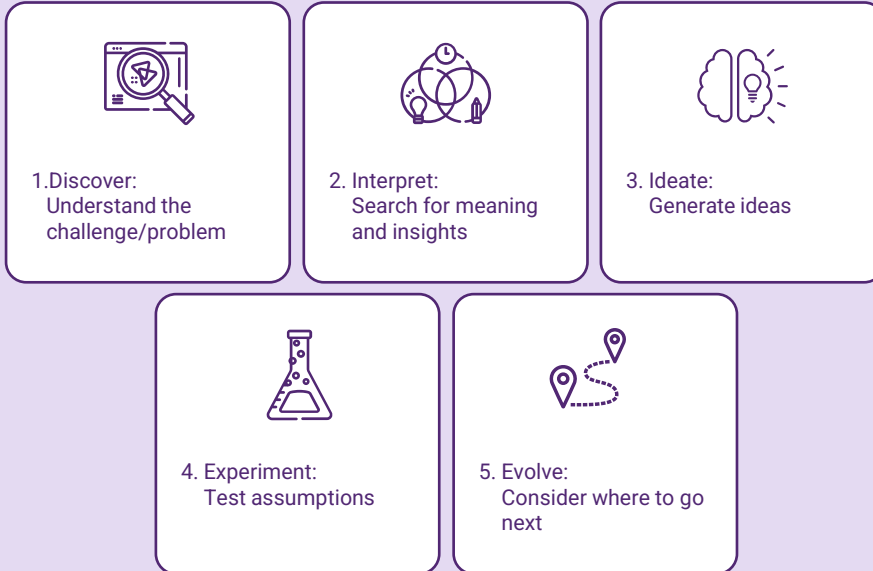
See also:
Dorst, K. (2011). The Core of "Design Thinking" and Its Application. *Design Studies* 32: 521-532.
Foster, M.K. (2021). Design Thinking: A Creative Approach to Problem Solving. *Management Teaching Review* 6(2): 123-140.

### LECTURE

Conducted on site, online (webinars) or hybrid. The main objective of this form of developing is to allow to learn about chosen phenomena and get to know some specific information concerning their characteristics.

The lectures should be supported by PowerPoint presentations and/or other visual supplements.

Lectures usually should be combined with group discussion or at least Q&A sessions.

### GROUP WORK

The group as a whole (or divided into smaller subgroups) aims to discuss some issue or figure out a sort of solution.

The main objective is to facilitate the exchange of ideas and reflections among participants as well as learning from each other.

### INDIVIDUAL WORK

A participant is asked to do a sort of self-reflection (usually with a reflection sheet) in order to gain deeper insight and understanding of their own attitudes, reactions, behaviours and/or analyse their experiences and work environment.

It is worth combining this individual work with group work in order to create a space for reflections and ideas exchange.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM · RUB · SciencesPo

RESET · Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## 1.6. The logic of the toolbox

The descriptions of modules are divided into two main categories: the first is oriented towards knowledge and the second towards skills. Knowledge-oriented training puts more attention on theoretical aspects of introduced concepts, structures and approaches. Its goal is to collect information and sensitise about the complexity of the academic environment. Skills-oriented materials are designed to experience different processes related to most common challenges, situations and cognitive mistakes that one can be affected by. Bloom's taxonomy (Bloom, Engelhart, Furst, Hill, Krathwohl, 1956; Krathwohl, 2002) and Kolb's cycle (Kolb, 1984) are used to structure and systematise the topics and discuss issues concerning equality and inclusivity.

Kolb's cycle is the basis of most successful development and education processes. It is also frequently used in the business area. This model was developed by Kolb (based on the observations of Lewin's T groups; Highhouse, 2002). It is based on the integration of two key learning processes: receiving information (through senses and emotions as well as symbol/language) and information processing (through introspection and reflection as well as action and activity). This model of learning (learning by experience; Kolb, 1984) assumes the following elements/stages of the educational process:
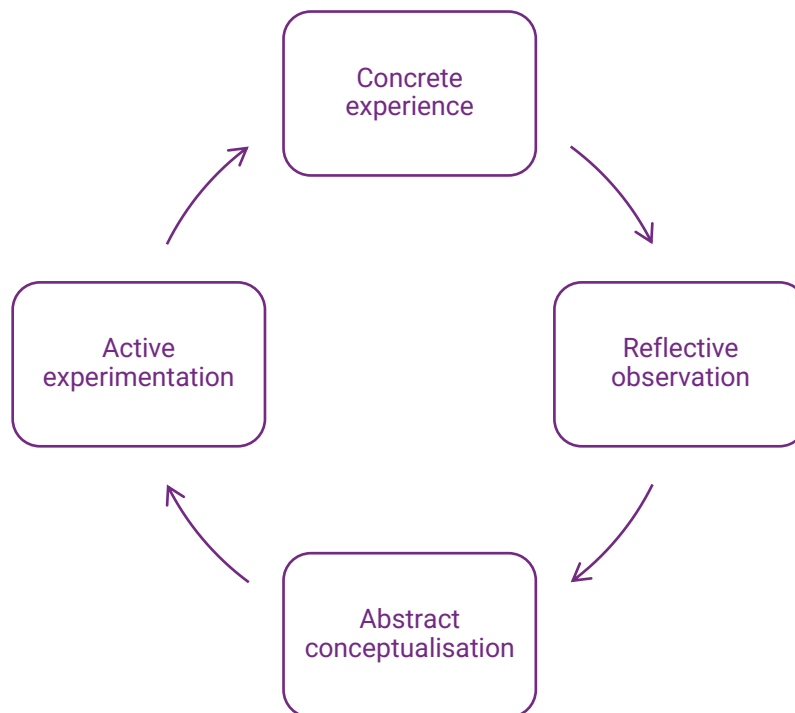


**Figure 4: Kolb's cycle**
Source: Kolb, D.A. (1984). Experiential Learning: Experience as the Source of Learning and Development. Prentice-Hall, Inc. Englewood Cliffs, NJ.

Participants will be able to understand, analyse and apply collected information in their everyday professional activities. As there is a diversity of stakeholders, who should be equipped with the knowledge and skills about gender equality issues, every module clearly indicates to whom development activities are directed.

The HEIs stakeholders in training programmes are described in the figure below.

| HEIs stakeholders in training programmes | Top and middle management (rectors, chancellors, deans, HR managers, directors of research and administrative units, heads of departments/units, plenipotentiaries) |
| --- | --- |
| | Researchers (at all stages of professional careers) |
| | Teachers (at all stages of professional careers) |
| | Administrative Staff |
| | PhD Students |
| | Students (and representatives of all parties, such as student organisations) |

*Figure 5: HEIs stakeholders in training programmes*
*Source: RESET WP4 D4.1. elaboration*

Keeping in mind that there are different learning styles, e.g., accommodating, diverging, converging, assimilating resulting in different learning needs, the toolbox satisfies all potential learners by providing the combination of online and on site sessions as well as different educational methods. Moreover, the underlying idea of the toolbox is to provide lesson scenarios that could be flexibly adapted to the needs and capabilities of a given group or organisation. Hence, in the toolbox one can find a proposal for both the optimal training path and basic training (as mentioned in the section 1.4).

## 1.7. Gender equality training schemes

All modules included in this toolbox are prepared using the same structure to facilitate a successful preparation for the training. The first part of the template contains general information about training structure, goals and group of participants. In the second section, learning areas, methods and activities as well as useful references are described. The important part of the toolbox is the section devoted to tailor-made training for a specific institution. This has originally been designed for the RESET consortium partners; however, any other organisation can follow the guidelines to collect important data for providing training. The closing element contains clues and tips for trainers.

The graph below summarises the main assumptions of the training schemes.

**BASIC INFORMATION**

Goal-oriented on knowledge or skills

1h of training = 45 minutes of learning

Form of training: online or face-to-face

Participants

**FORM OF TEACHING**

Webinar

Training

Workshop

Level of interaction with participants

**EXEMPLARY LEARNING METHODS**

Lecture

Discussion/Brainstorming/Group work

Self-reflection
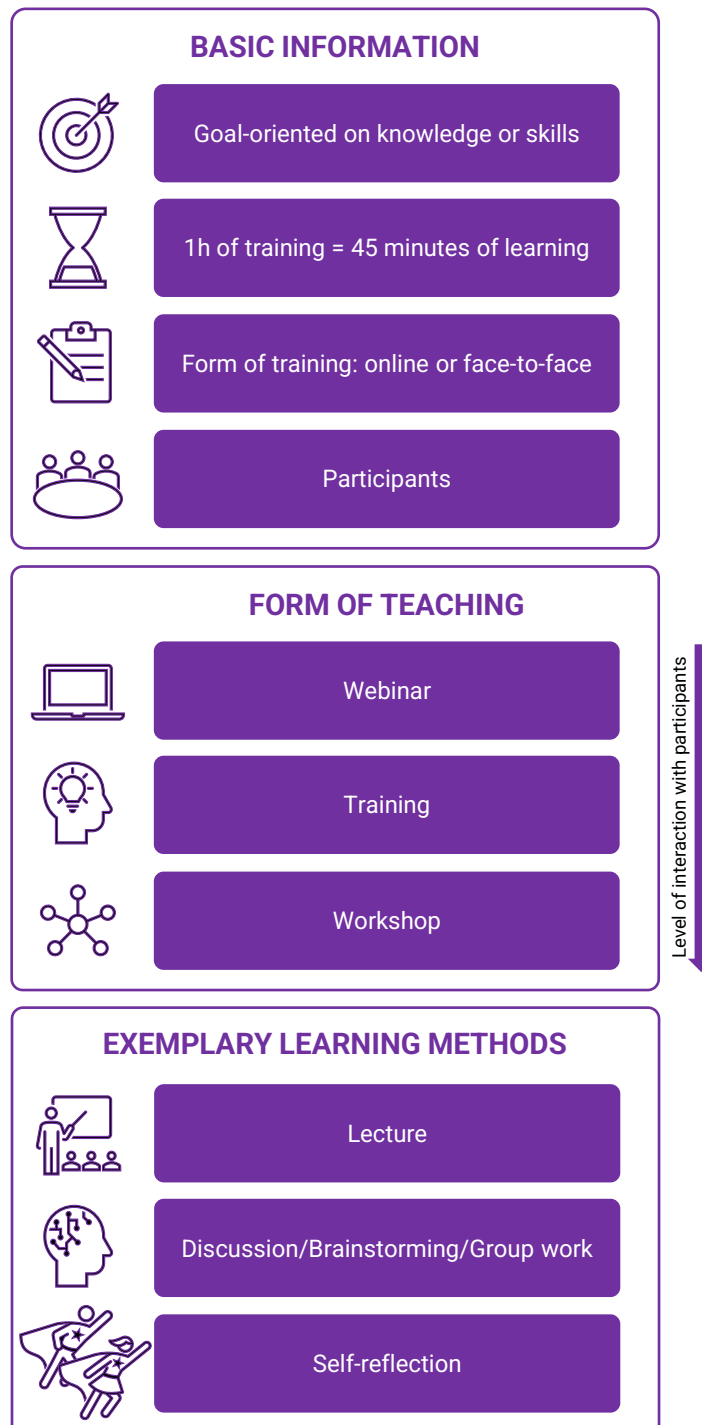
It is worth noting that the toolbox will be equipped with the so-called "invitation drafts", which will enable trainers to keep the participants informed about the major issues envisioned for the concrete training/workshop or webinar. Below you can find an example of such a document.

| Title of the development activity | GEP implementation – orientation on knowledge competencies |
|---|---|
| **Date** | 17.05.2024 |
| **Place** | Online, MS Teams |
| **Duration** | 4 hours, 9.00-12.00 am |
| **Participants** | • Top and middle management<br>• Administrative staff<br>• Academic staff |
| **Objective** | To get acquainted with the idea and the importance of GEP document in HEIs |
| **Learning results** | The participant:<br>• knows about the importance of gender equality in the EU<br>• understands the idea of GEP in the process of HEIs management<br>• is able to indicate the priorities of GEP design<br>• knows the necessity of GEP implementation and its consequences for the different processes in the academia<br>• is aware which stakeholders inside and outside of the academia to involve in the process of design and implementation of GEP<br>• is aware of possible challenges and resistance during the process of designing and implementation of GEP |
| **Topic and learning areas** | 1. The idea of gender equality at the HEIs from the European perspective.<br>2. The idea of GE at the academia at the national level (national/regional policies, governmental/municipal bodies responsible for GE).<br>3. GEP as a strategic tool (and the first step) for enhancing GE in HEIs.<br>4. How to design GEP taking into consideration national and institutional specificities (GEP composition).<br>5. The main goals of GEP and steps to follow in the process of data gathering and setting the objectives.<br>6. Introduction to GEP implementation – GEP composition.<br>7. The issue of creating a GE-friendly environment by GEP at the academia.<br>8. The role and responsibilities of different units and stakeholders.<br>9. Consequences of GEP approval.<br>10. Challenges, risks and possible resistances to the GEP implementation. |
| **Prework** | • to find the information about the national and institutional policies for GE.<br>• to get familiar with the website: https://eige.europa.eu/gender-mainstreaming/toolkits/gear/what-gender-equality-plan-gep. |
| **Contact to the trainer** | Mateusz Hauk, mail: mateusz.hauk@now.uni.lodz.pl |

## 1.8. Exemplary plan of training (optimal version)

The image below presents the (optimal and recommended) plan of training (foreseen activities and timeframe) using all the modules included in this toolbox. It can be adjusted to different needs, target groups and participants' engagement possibilities, however, the RESET WP4 team strongly recommends to take part in all the training sessions and choose all (or most) modules to gain sufficient knowledge about GE and diversity at the HEI.

**STARTING POINT**

**2023**

**OCTOBER**

Psychosocial risks at work
– aggression, mobbing and sexual harassment
8h (2x4h)

Reacting to harassment and inappropriate behaviours
14h (2x7h)

**NOVEMBER**

Diversity and inclusivity – foundations. Part 1
7h

Diversity and inclusivity culture in organisation. Part 2
14h (2x7h)

**DECEMBER**

Enhancing diversity and inclusivity culture
12h (2x6h)

**2024**

**JANUARY**

Enhancing diversity and inclusivity culture
12h (2x6h)

**FEBRUARY**

Enhancing diversity and inclusivity culture
12h (2x6h)

**MARCH**

Building positive relationships and enhancing positive attitudes toward diversity at work. Part 1 – Conflict resolution
14h (2x7h)

Preventing discrimination and unconscious bias – orientation on knowledge and skills competencies improvement
7h

**APRIL**

Building positive relationships and enhancing positive attitudes toward diversity at work. Part 3 – TA games
14h (2x7h)

Building positive relationships and enhancing positive attitudes toward diversity at work.
Part 2 – Ego states and units of recognition. 14h (2x7h)

**MAY**

Work-life balance. Part 2
8h (2x4h)

Work-life balance. Part 1
8h (2x4h)

**JUNE**

GEP Implementation. Part 2
7h

GEP Implementation. Part 1
7h

**HOLIDAY BREAK**

**OCTOBER**

Gender and diversity dimensions in research and teaching.
Part 2
7h

Gender and diversity dimensions in research and teaching.
Part 1
12h (3x4h)

**PROGRAMME CLOSURE**

Taking into consideration the RESET partners' needs and their engagement in other WPs, tasks and preparation of deliverables, we also suggest the modified plan of training, which assumes a different order of development activities. The image below shows this slightly reduced training programme.

**STARTING POINT**

**2023**

MARCH

GEP Implementation. Part 1
7h

GEP Implementation. Part 2
7h

APRIL

Gender and diversity dimensions in research and teaching.
Part 1
12h (3x4h)

Gender and diversity dimensions in research and teaching.
Part 2
7h

MAY

Psychosocial risks at work
– aggression, mobbing and sexual harassment
8h (2x4h)

Reacting to harassment and inappropriate behaviours
14h (2x7h)

JUNE

Diversity and inclusivity – foundations. Part 1
7h

Diversity and inclusivity culture in organisation. Part 2
14h (2x7h)

**HOLIDAY BREAK**

OCTOBER

Enhancing diversity and inclusivity culture
12h (2x6h)

Enhancing diversity and inclusivity culture
12h (2x6h)

NOVEMBER

Enhancing diversity and inclusivity culture
12h (2x6h)

Preventing discrimination and unconscious bias – orientation on knowledge and skills competencies improvement
7h

DECEMBER

Building positive relationships and enhancing positive attitudes toward diversity at work. Part 1 – Conflict resolution.
14h (2x7h)

**2024**

JANUARY

Building positive relationships and enhancing positive attitudes toward diversity at work.
Part 2 – Ego states and units of recognition. 14h (2x7h)

FEBRUARY

Building positive relationships and enhancing positive attitudes toward diversity at work. Part 3 – TA games.
14h (2x7h)

MARCH

Work-life balance. Part 2
8h (2x4h)

Work-life balance. Part 1
8h (2x4h)

**PROGRAMME CLOSURE**

## References

Bloom, B.S., Engelhart, M.D., Furst, E.J., Hill, W.H., & Krathwohl, D.R. (1956). *Taxonomy of educational objectives: The classification of educational goals. Handbook I: Cognitive domain.* New York: David McKay Company.

Cho, Y. (2009). Action Learning Research: A Systematic Review and Conceptual Framework. *Human Resource Development Review* 8(4):431-462.

Chomczyński, P. (2008). *Mobbing w pracy z perspektywy interakcyjnej. Proces stawania się ofiarą [Mobbing at work from an interactive perspective. The process of becoming a victim*]. University of Lodz Press.

Gut, J., Haman, W. (2015). *Psychologia szefa. Tom 1. Szef to zawód.* [*Boss psychology. Volume 1. Boss is a profession*]. Helion Publishing House.

Highhouse, S. (2002). A history of the T-Group and its early applications in management development. *Group Dynamics: Theory, Research, and Practice* 6(4): 277-290.

Kolb, D.A. (1984). *Experiential Learning: Experience as the Source of Learning and Development.* Prentice-Hall, Inc. Englewood Cliffs, NJ.

Krathwohl , D. R. (2002). A Revision of Bloom's Taxonomy: An Overview. *Theory Into Practice* 41:4, 212-218.

Kübler-Ross, E. (2014). *On Death and Dying: What the Dying Have to Teach Doctors, Nurses, Clergy and Their Own Families.* Simon and Schuster

Savolainen, S. (2016). Could Acceptance Predict Commitment in Organisational Change? Impact of Changes Caused by Succession From the Viewpoint of Non-family Employees in Small Family Firms. *Management Studies* 4 (5), 197-215

**Internet sources:**

https://www.ntl.org/human-interaction/what-is-a-t-group/

https://balint.co.uk/about/the-balint-method/

# MODULES

Psychosocial risks at work – aggression, mobbing and sexual harassment

Reacting to harassment and inappropriate behaviours

Diversity and inclusivity

Enhancing diversity and inclusivity culture;
preventing discrimination and unconscious bias
– orientation on knowledge and skills competencies improvement

Building positive relationships
and enhancing positive attitudes toward diversity at work

Work-life balance – orientation on knowledge competencies improvement

GEP implementation

Gender and diversity dimensions in research and teaching
(including GIA and intersectionality)

# Topic 2.1 Psychosocial risks at work – aggression, mobbing and sexual harassment

**Toolbox goal:**

☑ knowledge
☐ skills
☐ attitudes

**Participants:**

- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

**Recommended form of training:**

Synchronous face-to-face or online training

**Duration of recommended form of training:**

8h (2x4h)

**Form of basic training:**

online webinar

**Duration of basic training:**

2h

**Main objective:**

Improving knowledge and awareness about the phenomena of aggression, mobbing and sexual harassment at the workplace

**Specific objectives:**

- Improving knowledge and awareness about the phenomena of aggression, mobbing and sexual harassment at the workplace
- Focusing on understanding the characteristics, definitions and consequences (for the individual as well as the wider social and organisational environment) of the above mentioned phenomena

**Learning results**
**Educational effects**

The participant:

- has knowledge that helps to understand human behaviour related to aggression, mobbing and sexual harassment in the workplace, understands interpersonal processes related to the above-mentioned phenomena
- knows and understands the rules governing human behaviour in the organisation in difficult situations (in relation to communication, the functioning of groups within the organisation, conflicts and their resolving, power and management, organisational culture, basics of planning and decision-making)
- has knowledge of the main causes of aggression, mobbing and sexual harassment in the workplace
- is aware of the costs and consequences of aggression, mobbing and sexual harassment at various levels (individual vs group / social)

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Psychosocial risks at work

## LEARNING AREAS:

- Differentiation of concepts – anger, conflict, aggression and violence

- Selected definitions and typologies of aggression in the workplace, e.g., the definition proposed by the European Commission in 1994, 4 types of aggression according to the Californian Occupational Safety and Health Administration, Typology by Perline and Goldschmidt (2004), Typology by Neuman and Baron (1998)

- Definitions and understanding of mobbing, e.g., Heinz Leymann's (2011) approach, list of mobbing behaviours (activities that hinder the communication process; behaviours that adversely affect social relations; actions that damage the employee's image; behaviours that affect the employee's professional situation; behaviours that pose a threat to employee health), Definition of the Agency for Safety and Health at Work, mobbing as a process, mobbing phases, e.g., Einarsen (1999; Einarsen , Hoel, Zapf, Cooper, 2003); heterogeneity and diversity of the understanding and defining the phenomenon of mobbing and the potential consequences for the world of science and practice, mobbing and bullying

- Selected definitions and types of sexual harassment in the workplace

- Causes of aggression and mobbing in the workplace: the perpetrator's personality, the victim's personality, organisational factors (including management style)

- Causes of sexual harassment: biological model, socio-cultural model, organisational model, person-situation interaction model, 4-factor model

- Cultural differences and the pattern of showing anger, approach to conflicts, aggression and permission to aggression (including management style), mobber's characteristics, victim of mobbing characteristics

- Scale of exposure to aggression, mobbing and sexual harassment and frequency of the phenomena depending on the country and socio-cultural factors, frequency of the phenomena at a specific university (in reference to research carried out in RESET project and other publications)

- Aggression, mobbing and sexual harassment and gender

- Consequences/costs of aggression and mobbing and sexual harassment: immediate (e.g., emotional and behavioural responses) vs. distant, e.g., disturbances in daily functioning, somatic and mental disorders), perspective of an individual exposed to aggression and/or mobbing, perspective of witnesses, perspective of the organisation, socio-economic perspective

- The most important legal regulations regarding the above-mentioned phenomena – only a few and the most important

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Psychosocial risks at work

## USEFUL REFERENCES:

Anderson, C.A., Bushman, B.J. (2002). Human aggression. *Annual Review of Psychology,* 53(1): 27-51. https://doi.org/10.1146/annurev.psych.53.100901.135231.

Duffy, M. (2009). Preventing workplace mobbing and bullying with effective organizational consultation, policies, and legislation. *Consulting Psychology Journal: Practice and Research,* 61(3): 242-262. https://doi.org/10.1037/a0016578.

Einarsen, S., Hoel, H., Zapf, D., Cooper, C.L. (2003). The concept of bullying at work: The European tradition. In: *Bullying and emotional abuse in the workplace*, edited by S. Einarsen, H. Hoel, D. Zapf, C.L. Cooper. London: Taylor and Francis (3-30).

Einarsen, S., (1999). The nature and causes of bullying at work. *International Journal of Manpower,* vol. 20 no. 1/2: 16-27. https://doi.org/10.1108/01437729910268588.

Ferris, P.A. (2009). The role of the consulting psychologist in the prevention, detection, and mobbing in the workplace. *Consulting Psychology Journal: Practice and Research* 61(3): 169-189. https://doi.org/10.1037/a0016783.

Fitzgerald L.F., Swan S., Magley V.J. (1997). But was it really sexual harassment? Legal, behavioral, and psychological definitions of the workplace victimization of women. W: O'Donohue W. [red.]. *Sexual harassment. Theory, research, and treatment*. Allyn and Bacon, Boston, s. 5–28.

Finkelhor D., Hotaling G. (1984). Sexual abuse in national incidence study of child abuse and neglect. *Child Abuse Neglect*, 8:22–32.

Hirigoyen, M.F. (2003). *Molestowanie w pracy*. Poznań: Wydawnictwo W Drodze.

Neuman, J.H., Baron, R.A. (1998). Workplace violence and workplace aggression: evidence concerning specific forms, potential causes, and preferred targets. *Journal of Management* 24(3): 391-419. https://doi.org/10.1177/014920639802400305.

Perline, I.H., Goldschmidt, J. (2004). *The psychology and law of workplace violence: A handbook for mental health professionals and employers*. Springfield IL: Charles C Thomas Publisher.


Internet sources:

Leymann, H. (2011). *The mobbing encyclopaedia*. http://www.leyman.se. Accessed: 14.06.2011.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Psychosocial risks at work

## METHODS AND TRAINING ACTIVITIES:

Both in the recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants - introduction to concepts of aggression, mobbing and sexual harassment (with the setting of the phenomena in the context of anger, conflicts and inappropriate behaviours)
- Fragments of the video / staging / bubble dialogue method as a starting point for a discussion (e.g.: the film "Women's Day"), how it starts and lasts, costs / consequences
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations (about the phenomena: have I experienced such situations and actions, have I ever been witness to them, to what extent such behaviours have taken place or could take place in my organisation)
- Quiz and additional tasks (in pairs, in groups) on recognition, categorisation + discussions about the extent of exposure in a specific country and at a specific university
- Working in groups about the portrait of the mobber, "victim" of mobbing and aggression (who is the most vulnerable) + the reasons and causes of the above-mentioned phenomena, possible use of case studies
- Scripts + "knowledge pills" after training (definitions and ways of understanding terms + the most important legal regulations)

**Form of basic training**

Webinar presenting the above-mentioned phenomena and their frequency depending on the country and socio-cultural factors; during the webinar there will be a special time for discussion and a Q&A session for participants

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to find articles and research concerning the scale of exposure and frequency of aggression and mobbing in their country/culture and at their university
- Need to collect data concerning national and socio-cultural contexts of the above mentioned phenomena
- Need to find videos presenting aggression and mobbing that can serve as a contribution to the discussion with the participants

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Psychosocial risks at work

## USEFUL TERMS AND DEFINITIONS:

**Definition of aggression** by the European Commission (1994): "Any event during which a person is insulted, intimidated or attacked in work-related circumstances, which poses a direct or indirect threat to their safety, well-being and health".

**4 types of aggression** according to the Californian Occupational Safety and Health Administration:

1. Attacks that result from the criminal intentions of the perpetrator (eg burglary, robbery, theft).
2. Attacks resulting from the nature of the work that involves serving customers / applicants / patients.
3. Intra-organisational aggression, i.e. attacks by co-workers, superiors or subordinates
4. Acts of aggression by people who are unrelated to the company, but remain in personal relationships with the victim (family members, partners)

**Neuman and Baron** (1998) **approach to aggression (types of aggression):**

1. showing hostility – manifested in the form of verbally or non-verbally expressed hostility, e.g., by spreading rumours, interfering with work, interrupting speech, arrogant behaviour, belittling opinions,
2. obstructionism – deliberately obstructing the performance of professional tasks done by a person, not responding to correspondence or phone calls, being late for meetings, slowing down the work of the team, destroying or preventing access to materials / equipment needed for work,
3. public aggression – the most rare, but the most drastic form of aggression, which consists, for example of the theft or destruction of an employee's property or materials needed for work, destruction / deletion of important correspondence, non-compliance with safety rules at work, use of threats of physical violence, hitting, physical attack with the use of a dangerous tool or weapon

**Definition of mobbing by Leymann** (2011):

"[...] psychological terror in the workplace, which involves a hostile attitude and unethical communication (the use of insults, slander, etc. in everyday contacts) systematically maintained by one or several people in relation to another, which consequently pushes the victim into a position that makes it impossible to defend himself/herself/themself. These activities are frequent (at least once a week) and continue over an extended period of time (at least six months). Due to their duration and frequency, these maltreatment result in disturbances in the sphere of the victim's psyche, physical health and social functioning "[18, p. 168]

**4 phases of mobbing according to Einarsen** (1999):

1. Phase of aggressive behaviour - the employee begins to experience discreet, indirect actions that are difficult to be considered hostile
2. Phase of mobbing - there is an escalation of more direct "inappropriate" behaviour by the perpetrator, which becomes more and more overt, and their frequency increases. There are more and more clear symptoms of isolation and avoidance as well as humiliation in front of witnesses. Increasing the victim's level of stress, a simultaneous lack of support from other members of the organisation can be observed,
3. Stigma phase - unable to cope with the situation, the employee is pushed into the role of the victim. At this stage, he/she/they begins to increasingly experience the effects of stress, both psychological and somatic. He/she/they closes in on himself/herself/themself, avoids contact and any interaction with colleagues, he/she/they may start to react in an inadequate, uncontrolled manner (outbursts of aggression, apathy), which further deepens his/her/their exclusion from the work group.
4. The serious injury phase - the exclusion of an employee from work life, for example by increasing the employee's isolation (physical and social), assigning him/her/them fewer and fewer tasks or useless tasks to perform, including giving notice of termination of the employment contract.

**Definition of sexual harassment** (Fitzgerald, Swan, Magley, 1997): "unacceptable sexual behaviour that violates the dignity of the abused person or creates an intimidating, humiliating or hostile atmosphere"

**2 main types of sexual harassment**:
1. quid pro quo harassment, also known as sexual blackmail,
2. creating unfriendly working conditions.

**Four-factor model and its phases** (Finkelhor, Hotaling, 1984):
1. Motivation to harass,
2. Breaking internal resistance
3. Breaking external resistance
4. Breaking the potential resistance of the victim

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Psychosocial risks at work

## PRACTICAL TIPS AND GUIDELINES

- The most recommended form of training is face-to face. It allows Participants to learn about the phenomena and to get to know some specific information concerning their characteristics, moreover it allows them to gain knowledge from other participants (by working in a group), it gives the opportunity to self-analyse and reflect (combined with the exchange of ideas with other Participants).

- Work based on the so-called Kolb's Cycle.

- Work with the use of staging (based on video) + bubble dialogue method.

- Before starting the workshop, it is necessary to create an atmosphere of security, openness and discretion among participants (by: initial round, contract, work in smaller configurations).

- Use reports and materials on sexual harassment and GBV worked out by the RESET project within WP5: Ensure a sustainable and cultural change by establishing a gender and diversity-friendly environment.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic

## 2.2  Reacting to harassment and inappropriate behaviours

**Toolbox goal:**
- ☐ knowledge
- ☑ skills
- ☐ attitudes

**Participants:**
- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

**Recommended form of training:**
Synchronous face-to-face or online training

**Duration of recommended form of training:**
14h (2x7h with 1-hour lunch break each day)

**Form of basic training:**
Synchronous online training

**Duration of basic training:**
7h with 1-hour lunch break

**Main objective:**
Honing skills that allow one to react and intervene when experiencing inappropriate behaviours (victim as well as witness perspective)

**Learning results
Educational effects**

The participant:

**Specific objectives:**
- learning about useful tools and methods of reacting to inappropriate behaviours
- training and honing known tools and methods of reacting to inappropriate behaviours and harassment with real, difficult situations of the participants
- exchange of ideas of the most effective ways of reacting, concerning the national and socio-cultural contexts of participants
- exchange of ideas of useful ways to regulate emotions

- knows how to react to inappropriate behaviours as a witness
- knows how to react to inappropriate behaviours as a victim
- is able to effectively use a couple of methods when experiencing harassment in order to protect themselves and help others
- is aware of causes of resistance that can prevent them from react and can manage those causes
- can ask for help or support when experiencing difficult behaviours from others
- can deal with the emotions caused by difficult situations and co-regulate their self by revealing emotions in a safe place and relation

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Reacting to harassment and inappropriate behaviours

## LEARNING AREAS:

- NVC (Nonviolent communication) by Rosenberg – main assumptions and guidelines
- Assertive setting of boundaries
- Feedback as a way to react to inappropriate behaviours and harassment (from victim as well as witness perspective)
  - Why is it so difficult to give feedback when being attacked or being a witness to inappropriate behaviours?
  - Sender's resistance to giving feedback (especially when talking with supervisor)
  - Reactions to critical feedback - how to deal with anger and resistance from colleagues
  - Feedback pitfalls and mistakes - how to avoid communication barriers
- The basics of good feedback:
  - Communication: You vs Me
  - 'I messages I' as a starting point for critical feedback
  - Building the foundation for receiving critical feedback
- Dealing with your interlocutor's emotions during difficult feedback
- What is worth doing when feedback is not working? The need to graduate the response and announce further interventions, e.g., escalation, reporting to higher instance
- Assertive request for help or support when experiencing difficult behaviours from others – how to ask for help for "here and now", how to ask for support after self-regulation of emotions (long term perspective)
- Regulation of emotions - general guidelines and useful ways of dealing with emotions
- Emotional control - what can it lead to? Controlling and regulating emotions - important differences
- Anger, fear, sadness - what can I do when I experience them? How can I help others?
- Revealing emotions and talking about needs as effective ways to regulate emotions and tensions

## USEFUL REFERENCES:

Butler, P. (1976). *Self-assertion for women: a guide to becoming androgynous*. San Francisco: Canfield Press.

Hattie, J., Timperley, H. (2007). The Power of Feedback. *Review of Educational Research*, Vol. 77/1: 81-112. https://doi.org/10.3102/003465430298487.

Rosenberg, M.B., Chopra, D. (2015). *Nonviolent Communication: A Language of Life: Life-Changing Tools for Healthy Relationships*. Encinitas, CA: PuddleDancer Press.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Reacting to harassment
and inappropriate behaviours

**RESET**
Redesigning
Equality and
Scientific
Excellence
Together

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants – learning about chosen ways of reaction to harassment and inappropriate behaviours
- Working on real difficult situations of the participants using so called Tool Coaching
- Bubble dialogue method with captured video fragments
- Honing tools and ways of reacting in groups
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Group discussion – exchange of ideas and good practices

**Form of basic training**

- Lecture and discussion with participants – learning about chosen ways of reacting to harassment and inappropriate behaviours
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Honing tools and ways of reacting in groups
- Group discussion – exchange of ideas and good practices

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to find videos presenting aggression, mobbing or sexual harassment (or any other inappropriate behaviours) that can serve as a contribution to the role-playing with the participants

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Reacting to harassment and inappropriate behaviours

## USEFUL TERMS AND DEFINITIONS:

**The "You" message** – is a form of communication that says nothing about the "Sender" and at the same time breaks into the psychological field of the "Receiver".

**Contrary to "You Messages", the "I Message"** focuses on the Sender. It tells people how their behaviour influences us and what triggers us. It is based on facts, which enables us to take responsibility for our own emotions.

**The chosen model of feedback (I - message):**

- Facts – describe facts and behaviours that are the subject of feedback.
- Emotions – directly name emotions that arise in you in connection with the discussed situation or behaviour.
- Consequences – name the consequences of a behaviour (for you, a team, the whole organisation).
- Expectations – what are your expectations, requests or actions that would be desired in this situation.

**People's reaction to difficult feedback – Sara model** (https://decision-wise.com/the-sara-model-learning-from-360-degree-feedback/):

1. Shock
2. Anger
3. Resistance
4. Acceptance

**Assertive setting of boundaries by Pamela Butler:**

Step 1: Provide information

Step 2: Express what you feel

Step 3: Name "power base" (sanctions or further interventions)

Step 4: Introduce your "power base" (sanctions or further interventions)

**Nonviolent Communication by M. Rosenberg:**

It is the integration of four things:

- Consciousness: a set of principles that support living a life of compassion, collaboration, courage, and authenticity
- Language: understanding how words contribute to connection or distance
- Communication: knowing how to ask for what we want, how to hear others even in disagreement, and how to move toward solutions that work for all
- Means of influence: sharing "power with others" rather than using "power over others"

**4 steps and areas of NVC:**

1. pure observations
2. feelings
3. needs
4. request

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Reacting to harassment and inappropriate behaviours

## PRACTICAL TIPS AND GUIDELINES

- The most recommended method of training is based on so-called <u>Tool Coaching</u>.

- The training method and work rhythm need to be adjusted to the group dynamics and the stage of the group process: training in pairs / groups, training by putting a person in the spotlight, work with a camera and analysis of diagnostic roleplays.

- Before working on real difficult situations, it is recommended to use the so-called <u>bubble dialogue method</u>.

- During algorithm training in groups, it is important to encourage every participant to work on his/her/their  real situations or (at least) try to role-play and give feedback to others.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM RUB · SciencesPo

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

# Topic 2.3 Diversity and inclusivity – foundations Part 1

**Toolbox goal:**

☑ knowledge
☐ skills
☐ attitudes

**Participants:**

- Top and middle management
- Administrative Staff

**Recommended form of training:**

Synchronous face-to-face training

**Duration of recommended form of training:**

7h with 1-hour lunch break

**Form of basic training:**

Synchronous online training

**Duration of basic training:**

3h

**Main objective:**

Introduction to the basic concepts of diversity and inclusivity in academia

**Specific objectives:**

- learning about the legal regulations around diversity and inclusivity (human rights approach)
- learning about the concept of diversity and inclusivity
- introducing diversity and inclusivity in different processes, e.g., recruitment, communication, promotion, etc.
- learning about D&I policy and strategy

**Learning results Educational effects**

The participant:

- understands the idea of diversity and inclusivity in the workplace
- is aware of the areas and processes where diversity and inclusivity should be implemented
- understands the necessity of D&I strategy and policy in organisations
- knows some indicators related to D&I

## LEARNING AREAS:

- Why diversity and inclusivity?
    - The idea of human rights and national legal regulations related to diversity and inclusivity and the EU diversity charter as the foundations of these notions. How should we understand these concepts? Why are they so important for HEIs?
    - The dimensions of diversity and intersectional approach in research, teaching and administration.
    - Who should take care of D&I in HEIs?
- How to start?
    - Academic values and D&I. Diversity as a fundamental value.
    - Setting the fundamentals of D&I in different processes
    - Everyday communication on D&I
    - HR processes
    - Research and teaching
    - Setting priorities – data collection and analysis (what are the needs and expectations of the academic community, what is the knowledge of diversity and inclusivity among different groups of stakeholders, what kind of challenges are identified and in which areas)
- D&I policy and strategy
    - Diversity and inclusion (D&I) maturity model
    - The policy and strategy of D&I in HEIs
    - Continuous improvement of D&I
    - D&I checklist and monitoring
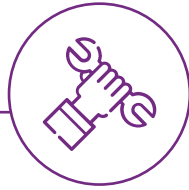    - Indicators related to D&I

## USEFUL REFERENCES:

Dobbin, F., Kalev A. (2016). Why Diversity Programs Fail. And What Works Better, *Harvard Business Review* July /August : 52-60.

Jansen, W.S., Otten S., van der Zee K.I., Jans L. (2014). Inclusion: Conceptualization and measurement, *European Journal of Social Psychology* 44(4): 370-385. https://doi.org/10.1002/ejsp.2011.

Köllen, T. (2021). Diversity Management: A Critical Review and Agenda for the Future. *Journal of Management Inquiry* 30(3): 259-272. https://doi.org/10.1177/1056492619868025.

Nweiser, M., Dajnoki K. (2022). The Importance of Diversity Management in Relation with Other Functions of Human Resource Management. A Systematic Review. *Cross-Cultural Management Journal* 24(1): 17-27. https://doi.org/10.13140/RG.2.2.11344.38408.

O'Donovan, D. (2018). Diversity and Inclusion in the Workplace. In: *Organizational Behaviour and Human Resource Management A Guide to a Specialized MBA Course*, edited by C. Machado, J.P. Davim. Berlin/Heidelberg: Springer (73-108).

Roberge, M-É. (2013). A Multi-Level Conceptualization of Empathy to Explain How Diversity Increases Group Performance. *International Journal of Business and Management 8*(3): 122-133. http://doi.org/10.5539/ijbm.v8n3p122.


Internet sources:

Diversity and inclusion database. https://hbr.org/topic/subject/diversity-and-inclusion. Accessed 15.06.2022.

European Commission database. https://ec.europa.eu/info/policies/justice-and-fundamental-rights/combatting-discrimination/tackling-discrimination/diversity-and-inclusion-initiatives_en. Accessed 18.11.2022.

Improving equality, diversity and inclusion in your workplace. https://www.acas.org.uk/improving-equality-diversity-and-inclusion/checking-equality-diversity-and-inclusion. Accessed: 16.08.2022.

The Deloitte Diversity and Inclusion Model. https://www.triangledei.org/blog/the-deloitte-diversity-and-inclusion-model. Accessed: 18.11.2022.

The Diversity and Inclusion Handbook. San Francisco: Lever. https://ideas.wharton.upenn.edu/wp-content/uploads/2018/07/Leading-Diversity-in-Organizations_Lever-2017.pdf. Accessed: 14.06.2022.

Universal Declaration of Human Rights, https://www.un.org/en/about-us/universal-declaration-of-human-rights. Accessed: 14.06.2022.

Where are you on the D&I maturity curve?. https://www.pwc.com/us/en/industries/industrial-products/library/diversity-inclusion-maturity-curve.html. Accessed: 18.11.2022.

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions, lectures and discussions.

**Recommended form of training**

The recommended form of training is a face-to-face meeting addressed mainly to the top and middle management and administrative staff. Training should be treated as a basic one. Participants will become acquainted with the most important terms and definitions of diversity and inclusivity and recognise that they support the diversity and inclusivity culture.

Proposed methods :
- Brainstorming session
- Group work and self-reflection exercises
- World Café about D&I in different processes
- Case studies
- Checklists

**Form of basic training**

The form of basic training will be limited to lectures with some practical exercises including group discussions and an input from participants.

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to find examples of D&I policies and strategies form national HEIs
- Need to figure out the national legal regulations about human rights and D&I
- Need to prepare a list with exemplary indicators of D&I used at different tertiary institutions in partner countries

RESET
**Redesigning Equality and Scientific Excellence Together**

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity
– foundations – Part 1

## USEFUL TERMS AND DEFINITIONS 1/2:

**Human rights** are rights that we have simply because we are human beings; they are not granted by any state. These universal rights are **inherent** to us all, regardless of nationality, sex/gender, national or ethnic origin, colour, religion, language, sexual orientation, age, disability, or any other status. They range from the most fundamental - the right to life - to those that make life worth living, such as the rights to food, education, work, health, and liberty (https://www.ohchr.org/en/what-are-human-rights).

**Inclusion** – "the practice or policy of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalised, such as those who have physical or mental disabilities and members of other minority groups" (How to influence inclusivity? https://www.artsprofessional.co.uk/magazine/article/how-influence-inclusivity); "the action or state of including or of being included within a group or structure" (Equity vs. Equality and Other Racial Justice Definitions. https://www.aecf.org/blog/racial-justice-definitions).

**Behavioural inclusion** is about the conduct of individuals as they undergo a journey of self-discovery and become more alert to the biases that hamper their decision-making (The Korn Ferry Diversity and Inclusion Maturity Model: A New Understanding. https://www.freshproduce.com/siteassets/files/talent/the_korn_ferry_diversity_and_inclusion_maturity_model_2020.pdf).

**Social inclusion** "is defined as the process of improving the terms of participation in society, particularly for people who are disadvantaged, through enhancing opportunities, access to resources, voice and respect for rights" (Identifying social inclusion and exclusion. https://www.un.org/esa/socdev/rwss/2016/chapter1.pdf).

**Structural inclusion** is about how equitable and transparent the systems and processes in place are in order to prevent unconscious bias from occurring in the first place—and that they are corrected when it does. (The Korn Ferry Diversity and Inclusion Maturity Model: A New Understanding. https://www.freshproduce.com/resources/talent/diversity-and-inclusion-maturity-model/).

**Diversity** – "the practice or quality of including or involving people from a range of different social and ethnic backgrounds and of different genders, sexual orientations, etc. Diversity is all about empowering people by respecting and appreciating what makes them different in regard to age, gender, ethnicity, religion, disability, sexual orientation, education, national origin and other defining factors about their identity (Diversity, Equity & Inclusion – Definition, Examples. https://unitedwaynca.org/blog/diversity-equity-inclusion/).

**The dimensions of D&I maturity by Korn Ferry** (The Korn Ferry Diversity and Inclusion Maturity Model: A New Understanding. https://www.freshproduce.com/siteassets/files/talent/the_korn_ferry_diversity_and_inclusion_maturity_model_2020.pdf):

**Compliance** – Measures risk management effectiveness. It essentially determines to what extent an organisation has the infrastructure, capabilities and behaviours necessary to identify, quantify, mitigate and prevent D&I related risks. An organisation that is fully mature in the behavioural inclusion aspect of Compliance displays full awareness by all stakeholders of the risks and impact associated with workplace harassment, bullying, and discrimination. Structural inclusion in Compliance is achieved when D&I is approached from a broader risk management perspective as opposed to just addressing bad behaviours when someone musters the courage to speak up. HR, leadership and the Board proactively monitor broader organisational risks (such as the need to have good reporting and whistle-blower systems in place) and where there are well understood consequences and processes for those who do not adhere to company policies and values regardless of their level and status.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity – foundations – Part 1

## USEFUL TERMS AND DEFINITIONS 2/2:

**Awareness** — Measures to what extent an organisation's leaders and employees are aware of and committed to the value of D&I. The spectrum of efforts in behavioural inclusion covers awareness building, advocacy, and knowledge of D&I, communicating its business value, and driving employee engagement. Leaders transition from having "D&I passion" to "D&I competency" and from "unconscious bias" to "conscious inclusion". The CEO and business leaders fiercely advocate for D&I, are authentically role-modelling inclusion and seen as "walking the talk". Structural inclusion in Awareness is demonstrated through robust and integrated D&I governance and accountability (e.g., Councils, ERGs, metrics) and by the external recognition of the organisation's D&I efforts through applying for awards and being certified by an outside organisation in the quality of these types of D&I efforts.

**Talent Integration** — Measures to what extent an organisation has integrated diversity and inclusion into their talent systems, and leaders and employees display inclusive behaviours. When behavioural inclusion is fully actualised in Talent Integration, inclusive behaviours become part of the entire talent management lifecycle and show up in key talent decisions. Leaders and employees display inclusion skills and leverage talent diversity for better decision making and team performance. When structural inclusion is fully actualised, the organisation's D&I strategy is integrated into its talent strategy, talent processes are reviewed for, and scrubbed from, unconscious biases, leaders and employees are held accountable for D&I Integration into talent management and robust talent analytics are applied to inform talent decisions.

**Operations Integration** — Measures the bottom-line impact of leveraging the organisation's diversity in an inclusive way that leads to greater efficiencies, increased safety, increased quality assurance, etc. The spectrum of efforts in behavioural inclusion covers functional leaders and middle managers role modelling inclusion and displaying inclusive leadership skills by deliberately putting together high performing diverse-by-design teams for operational tasks and projects. For structural inclusion, the spectrum of efforts includes D&I being fully leveraged within the operational ecosystem such as in Six Sigma and LEAN processes which require input from every team member, managing M&A workstreams, innovating new processes for greater safety, etc.

**Market Integration** — Measures the top line impact of D&I through expanding to markets of new consumers, enhanced customer service, and effective partnership with communities. From a behavioural inclusion perspective, organisations who have mature Market Integration of D&I are those where inclusion and cross-cultural competencies are applied in key decisions and market initiatives and where leaders and employees recognise their own need for cross-cultural competency and seek out further education. From a structural inclusion perspective, well understood processes such as innovation, product testing, marketing focus groups and campaigns are enhanced by greater D&I. D&I metrics are also embedded in all lines of management in all markets, and expected business outcomes, due to leveraging the organisation's D&I, are regularly evaluated to ensure sustainability. An organisation will also maintain active communications with diverse community and professional organisations, and their employee resource groups may help generate innovative solutions for diverse markets and customers. This requires the behavioural inclusion of leaders and others choosing to participate in these events and the structural inclusion of establishing well-structured strategic partnerships.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity – foundations – Part 1

## PRACTICAL TIPS AND GUIDELINES

- The idea of the training is to provide key information about the D&I concept from a managerial viewpoint.

- The vital point of the workshop is to introduce these concepts in order to make the participants aware of similarities and differences between them and to be able to start planning activities in the organisation.

- The workshop is more about setting the framework for enhancing a culture of diversity and an inclusivity development rather than individual training.

- The compilation of educational tools and work on real cases is an important element of this training. The issue of diversity and inclusivity may be seen as very sensitive and debatable.

- The role of the trainer is to shape the training conditions of involvement, confidence and openness, and to create the space for discussion respecting the rights of all participants.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic  2.4  Diversity and inclusivity culture in organisation Part 2

**Toolbox goal:**
- ☐ knowledge
- ☑ skills
- ☐ attitudes

**Participants:**
- Top and middle management
- Administrative staff
- Academic staff

**Recommended form of training:**

Synchronous face-to-face training

**Duration of recommended form of training:**

14h (2x7h with 1-hour lunch break)

**Form of basic training:**

synchronous face-to-face or online training

**Duration of basic training:**

7h with 1-hour break

**Main objective:**

Raising awareness and shared responsibility for implementing and rooting diversity culture in HEIs

**Learning results Educational effects**

The participant:

- knows the idea of diversity and inclusivity
- is aware of the psychological mechanisms leading to discrimination (such as stereotypes and prejudices)
- is aware of improper behaviours leading to discrimination and exclusion
- understands the need of putting D&I at the centre of the organisational culture in the internationalisation era
- becomes familiar with exemplary tools and methods of enhancing D&I in the organisation
- analyses different case studies and good practices
- is able to facilitate diversity and inclusivity in his/her environment

**Specific objectives:**

- learning about the concepts of diversity and inclusivity,
- learning about diversity culture in the workplace,
- discovering and experiencing tools and methods supporting diversity and inclusivity,
- learning about positive discrimination mechanisms,
- learning about good practices from HEIs and other sectors

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity culture
in organisation – Part 2

## LEARNING AREAS:

- Are we all the same?
  - Diversity bingo game as an icebreaker and introduction to the topic of diversity and inclusivity.
  - Diversity and inclusivity – main assumptions for HEIs.
  - The need for D&I in the era of internationalisation.
  - Inclusion of vulnerable groups such as women, neurodiverse people, LGBTQIA, migrants, etc.
  - The positive consequences of having diverse teams at university.
- Human rights respect in HEIs – how to create ideal conditions?
  - Avoiding discrimination - cognitive bias, stereotypes and prejudices.
  - Self-reflection and assessment of one's attitudes toward minorities and people other-than-myself (sameness vs. otherness).
  - Self-reflection of one's behaviour that can be regarded as improper and can be an indicator of discrimination to other people.
  - Diversity and inclusivity in research and teaching
  - Recommendations for D&I in the workplace – crucial points to promote and behaviours to avoid.
- Exemplary tools of individual and group sensitising:
  - Employee resource groups
  - Diversity projects
  - Diversity days/weeks
  - Living Libraries/Ask Me Anything initiatives
  - Some practical tips to boost diversity from a teammate perspective
  - Talking about diversity and inclusivity among teams
  - Gender sensitive language guidelines
  - Gender Impact Assesment tool
- Own responsibility – self-evaluation of one's actions enhancing diversity, self contracting.

université BORDEAUX    ARISTOTLE UNIVERSITY OF THESSALONIKI    U.PORTO    UNIVERSITY OF LODZ    UNIVERSITY OF OULU    RUHR UNIVERSITÄT BOCHUM RUB    SciencesPo

RESET
Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity culture in organisation – Part 2

# USEFUL REFERENCES 1/2:

Aronson, E., Wilson T.D. Akert R.M. Sommers S.R. (2015). *Social Psychology*. Hoboken NJ: Pearson.

Correll, S.J. (2017). SWS 2016 Feminist Lecture: Reducing Gender Biases in Modern Workplaces: A Small Wins Approach to Organizational Change. *Gender & Society* 31(6): 725-750. https://doi.org/10.1177/0891243217738518.

Cuddy, A.J.C., Fiske S.T., Glick P. (2008). Warmth and Competence as Universal Dimensions of Social Perception: The Stereotype Content Model and the BIAS Map. *Advances in Experimental Social Psychology* 40: 61-150. https://doi.org/10.1016/S0065-2601(07)00002-0.

Dobbin, F., Kalev A. (2016). Why Diversity Programs Fail. And What Works Better, *Harvard Business Review* July /August : 52-60

Fiske, S.T. (1998). Stereotyping, prejudice, and discrimination. In: *The handbook of social psychology*, edited by D.T. Gilbert, S.T. Fiske, G. Lindzey. New York: McGraw-Hill (357-411).

Hilton, J.L., von Hippel, W. (1996). Stereotypes. *Annual Review of Psychology* 47: 237-71. https://doi.org/10.1146/annurev.psych.47.1.237.

Jansen, W.S., Otten S., van der Zee K.I., Jans L. (2014). Inclusion: Conceptualization and measurement, *European Journal of Social Psychology* 44(4): 370-385. https://doi.org/10.1002/ejsp.2011.

Kite, M.E., Whitley Jr. B.E. (2016). *Psychology of Prejudice and Discrimination*. New York: Routledge.

Köllen, T. (2021). Diversity Management: A Critical Review and Agenda for the Future. *Journal of Management Inquiry* 30(3): 259-272. https://doi.org/10.1177/1056492619868025.

Klysing A., Lindqvist A., Björklund F. (2021) Stereotype Content at the Intersection of Gender and Sexual Orientation. *Frontiers in Psychology* 12: 713839. https://doi.org/10.3389/fpsyg.2021.713839.

Nweiser, M., Dajnoki K. (2022). The Importance of Diversity Management in Relation with Other Functions of Human Resource Management. A Systematic Review. *Cross-Cultural Management Journal* 24(1): 17-27. https://doi.org/10.13140/RG.2.2.11344.38408.

O'Donovan, D. (2018). Diversity and Inclusion in the Workplace. In: *Organizational Behaviour and Human Resource Management A Guide to a Specialized MBA Course*, edited by C. Machado, J.P. Davim. Berlin/Heidelberg: Springer (73-108).

Roberge, M-É. (2013). A Multi-Level Conceptualization of Empathy to Explain How Diversity Increases Group Performance. *International Journal of Business and Management 8*(3*)*: 122-133. http://doi.org/10.5539/ijbm.v8n3p122.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity culture in organisation – Part 2

# USEFUL REFERENCES 2/2:

Internet sources:

Cognitive Bias Codex. https://upload.wikimedia.org/wikipedia/commons/1/18/Cognitive_Bias_Codex_-_180%2B_biases%2C_designed_by_John_Manoogian_III_%28jm3%29.jpg. Accessed: 20.08.2022.

Diversity and inclusion database. https://hbr.org/topic/subject/diversity-and-inclusion. Accessed 15.06.2022.

European Commission database. https://ec.europa.eu/info/policies/justice-and-fundamental-rights/combatting-discrimination/tackling-discrimination/diversity-and-inclusion-initiatives_en. Accessed 18.11.2022.

GIA checklist and protocol in all project languages (2021). https://www.genderportal.eu/resources/gia-checklist-and-protocol-all-project-languages. Accessed: 20.12.2022.

Handbook on European Non-discrimination Law. (2018). European Union Agency for Fundamental Rights. https://fra.europa.eu/sites/default/files/fra_uploads/fra-2018-handbook-non-discrimination-law-2018_en.pdf. Accessed: 25.11.2022.

How to Foster Workplace Belonging Through Successful Employee Resource Groups. Forbes https://www.forbes.com/sites/rebekahbastian/2019/02/11/how-to-foster-workplace-belonging-through-successful-employee-resource-groups/?sh=462d8d53dc. Accessed: 25.11.2022.

Improving equality, diversity and inclusion in your workplace. *Advisory, Conciliation and Arbitration Service*. https://www.acas.org.uk/improving-equality-diversity-and-inclusion/checking-equality-diversity-and-inclusion. Accessed: 25.11.2022.

Inclusive, Transparent and Unbiased Recruitment Processes. LIBRA Recruitment Handbook (2017). https://www.eu-libra.eu/sites/default/files/article-files/libra_recruitment_guidelines_second_edition.pdf._Accessed : 14.06.2022.

Stereotypes (2015). https://scholar.harvard.edu/files/shleifer/files/stereotypes_june_6.pdf. Accessed: 5.05.2022.
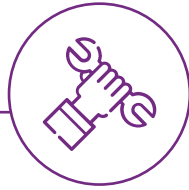
The Diversity and Inclusion Handbook. (2017). San Francisco: Lever. https://ideas.wharton.upenn.edu/wp-content/uploads/2018/07/Leading-Diversity-in-Organizations_Lever-2017.pdf. Accessed: 14.06.2022.

The Deloitte Diversity and Inclusion Model. https://www.triangledei.org/blog/the-deloitte-diversity-and-inclusion-model. Accessed: 18.11.2022.

Universal Declaration of Human Rights. https://www.un.org/en/about-us/universal-declaration-of-human-rights. Accessed: 14.06.2022.

Where are you on the D&I maturity curve?. https://www.pwc.com/us/en/industries/industrial-products/library/diversity-inclusion-maturity-curve.html. Accessed: 18.11.2022.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity culture
in organisation – Part 2

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

Due to the importance of the topic, the preferred type of training is face-to-face. Participants will be involved in activities by playing short scenes; they will be able to assess the behaviour of other people and propose ways of reacting to a given situation.

- Lectures and discussions can shape the direction of a further educational process. Some new concepts, such as stereotype or discrimination, will be introduced but they should not dominate the topic of the training. The main idea is to create a positive atmosphere of understanding, respect for others in order to build a climate for diversity and inclusivity from both personal and institutional perspectives.
- Bingo is a kind of game that can be very useful in the "Are we all the same" exercise
- Case study and role-playing may support the understanding of others' perspectives.
- Group work and group tasks will lead to the flow of knowledge and experience and ease the process of designing shared recommendations ready to be implemented in different kinds of educational institutions.
- Method of small wins
- Asking people to estimate the likelihood or probability that an individual member of a group has a certain characteristic
- Self-evaluation in the form of a checklist or another personal task will summarise the process and give the opportunity to identify areas for improvement.

**Form of basic training**

Due to the importance of the topic, the preferred type of training is face-to-face. Participants will be involved in activities by playing short scenes, they will be able to assess the behaviour of other people and propose ways of reacting to a given situation.

- Lectures and discussions
- Case study
- Group work and group tasks
- Self-evaluation

RESET
Redesigning
Equality and
Scientific
Excellence
Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- Need to figure out the most common stereotypes about gender, race and age in the country.
- Need to find national policies, frameworks or guidelines for vulnerable and potentially prone to exclusion groups.
- Need to collect examples of good practices about D&I projects and activities for HEIs and other sectors.

## USEFUL TERMS AND DEFINITIONS 1/2:

**Inclusion** – "the practice or policy of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalised, such as those who have physical or mental disabilities and members of other minority groups" (How to influence inclusivity? https://www.artsprofessional.co.uk/magazine/article/how-influence-inclusivity); "the action or state of including or of being included within a group or structure" (Equity vs. Equality and Other Racial Justice Definitions. https://www.aecf.org/blog/racial-justice-definitions).

**Diversity** – "the practice or quality of including or involving people from a range of different social and ethnic backgrounds and of different genders, sexual orientations, etc. Diversity is all about empowering people by respecting and appreciating what makes them different in regard to age, gender, ethnicity, religion, disability, sexual orientation, education, national origin and other defining factors about their identity (Diversity, Equity & Inclusion – Definition, Examples. https://unitedwaynca.org/blog/diversity-equity-inclusion/).

**Inappropriate behaviour** in the workplace means that the person behaves in an unprofessional manner and has a problem with respecting the rights of others. This kind of behaviour may include e.g., harassment, bullying, aggression and violence.

**Positive discrimination** "is the practice of favouring someone due to 'protected characteristics' - in an attempt to reduce inequality. The goal is usually to increase the number of minority background employees in a business. In the workplace, positive discrimination could occur if someone is hired or promoted because of their belonging to an underrepresented group" (What Is Positive Discrimination? And Should You Be Doing It?. https://www.beapplied.com/post/what-is-positive-discrimination). There are several "protected characteristics"/factors that can lead to someone being discriminated, among others, age, disability, gender identity, marriage and civil partnership, pregnancy and maternity, race, ethnicity, nationality, religion or belief (or lack thereof), sexual identity, economic status. Examples of positive discrimination: quota system, zipper method.

**Causes of Prejudice and discrimination:**

**Pressures to Conform:**

**Normative Conformity –** the tendency to go along with the group in order to fulfill the group's expectations and gain acceptance

**Social Identity Theory –** us versus Them. Each of us develops a personal identity that is based on our particular traits and unique life history. But we also develop a social identity based on the groups we belong to, including our national, religious, political, and occupational groups

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity culture in organisation – Part 2

## USEFUL TERMS AND DEFINITIONS 2/2:

**Homophily Theory** – refers to the tendency that people are more likely to interact with individuals similar to themselves

**Ethnocentrism –** the belief that your own culture, nation, or religion is superior to all others is called ethnocentrism. It is universal, probably because it aids survival by increasing people's attachment to their own group and their willingness to work on its behalf. It rests on a fundamental category: us

**Out-Group Homogeneity -** besides the in-group bias, another consequence of social categorisation is the perception of out-group homogeneity, the belief that "they" are all alike In-group members tend to perceive those in the out-group as more similar to each other (homogeneous) than they really are.

**Realistic Conflict Theory –** holds that limited resources lead to conflict between groups and result in prejudice and discrimination

**Living Library** is an equality-oriented tool that seeks to challenge prejudice and discrimination. It works just like a normal library: visitors can browse the catalogue for the available titles, choose the Book they want to read, and borrow it for a limited period of time. After reading, they return the Book to the library and, if they want, they can borrow another. The only difference is that in the Living Library, Books are people, and reading consists of a conversation. (Don't Judge a Book by Its Cover. https://rm.coe.int/16807023dd).

**Types of conflicts** in the workplace:
1. status conflict
2. task conflict
3. process conflict
4. relationship conflict

Source: 4 Types of Conflict and How to Manage Them – podcast (https://hbr.org/podcast/2015/11/4-types-of-conflict-and-how-to-manage-them.html?gclid=CjwKCAjwm-fkBRBBEiwA966fZKLTzb0KjvnL9IM4SIZLUwGVKAR_VV8zbIeKnRWNvpDuEOZ_JkSZexoCIK4QAvD_BwE).

**Stereotypes and prejudices** – "refer to social interactions that are marked by an emphasis on peoples' (assumed) belonging to social groups rather than their individual characteristics (Straub & Niebel, 2021). Moreover, stereotypes are not limited to the perception and assessment of others, but also refer to individuals, who assess themselves in light of their own group affiliations (Hannover & Wolter, 2018). That can be their gender, as well as other social and cultural categories such as age, ethnicity/origin, sexual orientation. or religious affiliation. Often, it is the combination or intersection of these categories. The contents of gender stereotypes are shaped by cultural norms and values (Cuddy et al., 2015). Stereotypes, in contrast to prejudices, are cognitive schemata about social groups as well as about individuals as part of those social groups (including ourselves). They are components of knowledge, structures as well as means of the processing of social in-formation (Straub & Niebel, 2021). They can also influence gender identity in that a person ascribes gendered attributes to oneself, as well as the extent to which a person does so (Hannover & Wolter, 2018)." ("Toolbox for gender-neutral, diversity-oriented institutional communication" WP5, RESET project).

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Diversity and inclusivity culture in organisation – Part 2

## PRACTICAL TIPS AND GUIDELINES

- Trainers are asked to study the scientific literature as well as the newspapers and collect case studies and examples before training. The workshop can be also divided into smaller parts and shared in the form of webinars and short films. However, the most effective way of improving competencies are face-to-face interactions.

- The intention of the workshop is to tackle the problem of discrimination and present it in a form of positive messages like diversity and inclusivity. This is why the concept of discrimination is very marginalised to reorient the attention of participants from negative associations to positive values.

- Other activities of the RESET project, such as the toolbox on gender-inclusive language (WP6) or the reports on work-life balance and parenting (WP5, WP6) can be useful during workshop as good practises of how to tackle diversity and inclusivity with a needs-based  approach.

RESET
**Redesigning Equality and Scientific Excellence Together**

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic

## 2.5 Enhancing diversity and inclusivity culture

**Toolbox goal:**
☐ knowledge
☑ skills
☐ attitudes

**Participants:**
- Top and middle management

**Recommended form of training:**
Synchronous face-to-face training

**Duration of recommended form of training:**
36h (6x6h
with 1-hour lunch break each day)

**Form of basic training:**
Synchronous online training

**Duration of basic training:**
36h (6x6h
with 1-hour lunch break each day)

**Main objective:**
Honing skills allowing for the enhancement of diversity and inclusivity culture

**Learning results
Educational effects**

The participant:

**Specific objectives:**

- learning about useful tools and methods that can help to set expectations and contract rules strengthening the diversity and inclusivity culture
- learning about enforcement procedure to strengthen the diversity and inclusivity culture
- training and honing known tools and methods with real, difficult situations of participants
- exchange of ideas concerning rules, principles and standards helping to strengthen the diversity and inclusivity culture

- knows how to set expectations and contract rules strengthening the diversity and inclusivity culture
- is able to effectively use the selected methods in order to stop inappropriate behaviour and strengthen the diversity and inclusivity culture (e.g., leader's expose algorithm, algorithm for contracting cooperation with a subordinate team, feedback algorithm, problem conversation algorithm, sanctioning algorithm)
- is aware of the causes of disobeying rules by team members and can manage them
- can effectively use the enforcement procedure and graduate interventions according to the behaviour of colleagues and its intensity
- can deal with different situations during difficult conversations with colleagues

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUB · SciencesPo

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Enhancing diversity and inclusivity culture

## LEARNING AREAS 1/3:

- The role and challenges of a Leader in relation to enhancing diversity and inclusivity culture
  - Dilemmas in the role of a leader: Management in the spirit of cooperation and setting an example, in accordance with the principle of "Soft to people, hard to the problem"
  - Psychological mechanisms of communication in relation between leader and employees as basics for enhancing diversity and inclusivity culture
  - Projection and ways to minimise negative projections
  - Projections in the leader's role. How to minimise the risk of a negative attitude from colleagues and subordinates. How to avoid negative projections towards colleagues and subordinates. How to build an atmosphere of openness and trust in relation to others
  - Norm of reciprocity and the principle of modelling, and how it interferes with building openness. The role of the leader as a model for subordinates to follow in difficult situations
- Setting expectations and contracting
  - Double expectations model - how to minimise the risk of unwanted behaviours and increase the frequency of desired ones
  - Exchange of ideas about rules and principles needed to enhance diversity and inclusivity culture and stop inappropriate behaviours among teams and organisations
  - Leader's expose algorithm - how to convey expectations as to goals, areas of preferences and behaviours unacceptable by the superior's authority
  - Introduction to goals and expectations contracting:
  - 3 contract levels according to Transaction Analysis: administrative, professional and psychological.
  - Algorithm for contracting cooperation with a subordinate team. A way of establishing mutual rules and principles, as an alternative to the leader's expose
  - Practice: Work with case studies of real business training with diagnostic and corrective staging - recordings. Practice of the expose and contracting algorithms on real situations reported by the participants

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Enhancing diversity and inclusivity culture

## LEARNING AREAS 2/3:

- Enforcement with a human face part 1
  - Feedback as a way to improve diversity and inclusivity culture and enforcement of desired cooperation standards
  - Why is it so difficult to give feedback when observing inappropriate behaviours?
  - Sender's resistance to giving feedback
  - Reactions to critical feedback - how to deal with anger and resistance of colleagues
  - Feedback pitfalls and mistakes - how to avoid communication barriers
  - The basics of good feedback:
  - Communication: You vs Me
  - The I – message model as a starting point for critical feedback
  - Building the foundation for receiving critical feedback
  - Practice of the feedback algorithm on real situations reported by the participants
  - Feedback from another perspective: signs of recognition (according to Transactional Analysis) and building capital in relation to difficult situations
  - A short introduction to Transactional Analysis: Parent-Adult-Child Model.
  - The concept of "hunger" in relation to Transactional Analysis
  - What are the signs of recognition and why are they important in terms of building capital in a relationship with the team?
  - Types and examples of recognition signs
  - Feedback as an example of a positive, verbal conditional sign of recognition
- Enforcement with a human face part 2
  - What is worth doing when feedback is not working and standards are not respected at the expected level?
  - Enforcement procedure to strengthen the diversity and inclusivity culture
  - The main causes of failure and breaching of rules by team members
  - The logic of enforcement interventions in the spirit of "looking for causes, not the guilty"
  - The responsibility of the leader in the event of a recurring problem in cooperation
  - Talking about the problem, i.e. diagnosing the causes of difficulties and contracting new solutions
  - Algorithm of a conversation about the problem in cooperation. Next steps of intervention in this situation class
  - The key moments and the most common pitfalls
  - Practice: Work with case studies of real business training with diagnostic and corrective staging – recordings. Problem conversation algorithm training

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts
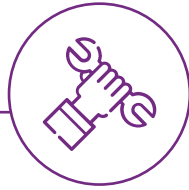
Enhancing diversity and inclusivity culture

## LEARNING AREAS 3/3:

- Enforcement with a human face part 3
  - What is worth doing when talking about a problem and contracting rules or standards does not work? How to react in a situation of "recidivism"?
  - Sanctioning by the authority of a leader. Whether and how to introduce sanctions in relation to a team member who repeatedly violates the established rules or standards of diversity and inclusivity?
  - Repertoire of formal and informal sanctions that can be applied
  - Setting boundaries with sanctions, i.e. a last-resort conversation
  - The most important principles of sanctioning "with a human face": with firmness, respect and empathy towards the other person
  - Practice: Work with case studies of real business training with diagnostic and corrective staging – recordings. Sanctioning conversation algorithm training

## USEFUL REFERENCES:

Hay, J. (2009). *Transactional Analysis For Trainers*. Hertford: Sherwood Publishing.

Scott, K. (2019). *Radical Candor: How to Get What You Want by Saying What You Mean*. New York: Pan Books.

Hersey, P., Blanchard, K., Johnson, D. (2012). *Management of organizational behavior. Leading human resource*. Hoboken NJ: Pearson

Lencioni, P. (2002). *The Five Dysfunctions of a Team: A Leadership Fable*. Hoboken Nj: Jossey-Bass.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Enhancing diversity
and inclusivity culture

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic form of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants – learning about the role of a leader and enforcement with a human face procedure
- Working on real difficult situations of the participants using so-called Tool Coaching
- Honing tools and ways of reacting in groups
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Group discussion – exchange of ideas and good practices
- Manager's supervision – Balint Group and Action Learning

**Form of basic training**

- Lecture and discussion with participants – learning about the role of a leader and enforcement with a human face procedure
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Honing tools and ways of reacting in groups
- Group discussion – exchange of ideas and good practices

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to figure out rules and standards that can improve diversity and inclusivity culture and stop inappropriate behaviours
- Need to build repertoire of formal and informal sanctions that can be applied at specific university according to existing procedures and regulations

## USEFUL TERMS AND DEFINITIONS 1/2:

**The "You" message** – is a form of communication that says nothing about the "Sender" and at the same time breaks into the psychological field of the "Receiver".

Contrary to "You Messages", **"Me Message"** focuses on the Sender. It tells people how their behaviour influences us and might trigger us. It is based on facts, which enables us to take responsibility for our own emotions.

**The chosen model of feedback:**
1. Facts – describe facts and behaviours that are the subject of feedback.
2. Emotions – directly name emotions that arise in you in connection with the discussed situation or behaviour.
3. Consequences – name the consequences of a behaviour (for you, a team, whole organisation).
4. Expectations – what are your expectations, requests or actions that would be desired in this situation.

**The most common mistakes and pitfalls of enforcement:**

1. Imprecise rules or standards or imposed on the employee without mutual agreement.
   Blurred goals, imprecise expectations, lack of information about the method of control and settlement are the main mistakes at the beginning of enforcement. An additional common trap is the imposition of tasks or standards without any mutual agreement.

2. Failure to respond consistently to breaking the rules.
   It is not the severity of the punishment and the strength of the consequences that determine the change, but the inevitability of the superior's reaction. If you "turn a blind eye" several times, you increase the risk of an unwanted behaviour appearing in the future or its escalation.

3. Invariability of behaviour in a situation of "recidivism".
   Often a trap is the lack of intensification of superiors' influence despite situations being repeated or inappropriate behaviour can be seen. If we constantly react in the same way and the employee does not change, we cannot expect a miracle to occur without changing our behaviour.

4. Demanding solutions without understanding the reasons.
   "Understand the causes first, then look for a solution" is the golden rule of learning from mistakes and supporting change. If we press people to find solutions, we leave them alone without analysing and understanding the causes of difficulties, thus we reduce the chance of any change.

5. Reluctance to introduce sanctions or too severe sanctions not adjusted to the behaviour.
   Some superiors are paralyzed when there is a need to introduce sanctions; they postpone them, giving another chance, hoping for a miracle. And then, when emotions reach their zenith, for the lack of other ideas, they refer to a very severe punishment, explaining to the employee that it is for the whole thing and he/she/they have accumulated it.

6. Insufficient knowledge and/or interpersonal skills.
   Enforcement requires an idea, a well-thought-out strategy and strong interpersonal skills that allow supervisors to conduct conversations, control emotions, reach the motivation and needs of employees, build understanding and common conclusions, negotiate and set limits. Unfortunately, even the best intentions are not enough if in conversation, we take shortcuts and communicate in an improper way. Without interpersonal skills, there is no enforcement.

**Problem conversation algorithm:**

1. Clearly identify the emerging problem. Name the purpose of the meeting directly. Minimise possible negative projections. Give the employee feedback on problematic behaviour.

2. Finding the causes of the problem and sources of difficulties in obeying rules.
   Encourage openness and willingness of joint search for the causes of difficulties. Ask the employee about possible reasons for inappropriate behaviours. Diagnose the most important ones. Summarise the findings and together choose the causes that you will counteract.

3. Generating possible solutions together. Name the sense of joint looking for solutions to the problem. Encourage the employee to provide solutions. Offer possible help.

4. Make arrangements for the future. Summarise the joint findings. What, who, when, and how it will be different now. Name how you will verify the implementation of change. Remind about sanctions. Give thanks and appreciate the joint work.

## USEFUL TERMS AND DEFINITIONS 2/2:

**Some useful tips concerning sanctioning:**

- Introduce sanctions in private, or with a witness indicated by you or an employee. Never reprimand an employee in a a public environment.
- Introduce the consequences for specific behaviours. Never judge a person, their attitude, commitment, beliefs, values.
- If you are considering introducing any consequences, announce it at an earlier stage of enforcement.
- Adjust sanctions. Start with the smallest possible sanction and, if needed, graduate them.
- When introducing a sanction, time it. Never give a sanction without assigning its end.
- In case of "recidivism", intensify the sanction and consider whether further cooperation is possible and profitable for both sides.
- Be patient and consistent. Change takes time.
- Introduce sanctions only in a direct conversation with the employee. Only in conversation can you ensure respect, mutual understanding and make the exchange meaningful.

## PRACTICAL TIPS AND GUIDELINES

- The most recommended way of training is based on so-called Tool Coaching.
- During algorithm training in groups, it is important to encourage every participant to work on her/his/their real situations or (at least) try to role-play and give feedback to others.
- The training method and work rhythm need to be adjusted to the group dynamics and the stage of the group process: training in pairs / groups, training by putting a person in the spotlight, work with a camera and analysis of diagnostic roleplays.

## Topic

### 2.6 Preventing discrimination and unconscious bias – orientation on knowledge and skills competencies improvement

**Toolbox goal:**

☑ knowledge
☑ skills
☐ attitudes

**Participants:**

- Top and middle management
- Administrative staff
- Academic staff
- Phd students

**Recommended form of training:**

Synchronous face-to-face training

**Duration of recommended form of training:**

7h
with 1-hour lunch break

**Form of basic training:**

Short webinars

**Duration of basic training:**

0,5h

**Main objective:**

Getting acquainted
with the challenges of discrimination
and unconscious bias

**Specific objectives:**

- introducing the issue of unconscious bias in everyday professional situations
- learning about causes of discrimination
- discovering areas of gender discrimination at HEIs
- learning about situations of discrimination
- learning about types of discrimination
- learning about improper behaviours

**Learning results
Educational effects**

The participant:

- knows what discrimination is
- understands the challenges and costs of discrimination and unconscious bias in the workplace
- is aware of the mechanisms of discrimination, such as stereotypes and prejudices
- knows the types of discrimination
- can indicate the types of improper behaviours

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Preventing discrimination and unconscious bias

**LEARNING AREAS:**

- The issue of discrimination and the consequences of being affected by discriminatory behaviours.
- Different types of discrimination (because of gender, sex, age, religion etc.).
  - Intersectional discrimination
  - Direct discrimination
  - Indirect discrimination
  - Harassment
  - Victimisation
- Stereotypes and prejudice.
- What are the main causes of stereotypes and prejudices, and what they can lead to?
- Stereotypes and biases and perceiving others and interpreting their behaviours
- Gender discrimination in the workplace.
- Sets of beliefs about men and women in my culture
- Examples of gender discrimination in different processes
- Costs of discrimination in the workplace (from the individual, team and university perspectives)
- How does it work? Unconscious biases. Types and consequences.
- Exemplary types:
  - Perception bias
  - Affinity bias
  - Halo effect
  - Confirmation bias
  - Attribution bias and other types of cognitive bias
- How can they affect interpersonal relations?
- Discrimination and organisational functioning:
  - promotions
  - leadership
  - tasks and responsibilities delegation
  - resources allocation
  - other
- How to deal with improper behaviours and discrimination at work - best-practices and rules of safe organisation.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Preventing discrimination and unconscious bias

## USEFUL REFERENCES:

Aronson, E., Wilson T.D. Akert R.M. Sommers S.R. (2015). *Social Psychology*. Hoboken NJ: Pearson.

Bobbitt-Zeher, D. (2011). Gender discrimination at work: Connecting gender stereotypes, institutional policies, and gender composition of workplace. *Gender & Society* 25(6): 764-786. https://doi.org/10.1177/0891243211424.

Chang, E.H., Milkman K.L. (2020). Improving decisions that affect gender equality in the workplace. *Organizational Dynamics* 49(1): 100709. https://doi.org/10.1016/j.orgdyn.2019.03.002.

Cuddy, A.J.C., Fiske S.T., Glick P. (2008). Warmth and Competence as Universal Dimensions of Social Perception: The Stereotype Content Model and the BIAS Map. *Advances in Experimental Social Psychology* 40: 61-150. https://doi.org/10.1016/S0065-2601(07)00002-0.

Fiske, S.T. (1998). Stereotyping, prejudice, and discrimination. In: *The handbook of social psychology*, edited by D.T. Gilbert, S.T. Fiske, G. Lindzey. New York: McGraw-Hill (357-411).

Heilman, M.E., Caleo, S. (2018). Gender discrimination in the workplace. In: *The Oxford handbook of workplace discrimination*, edited by A.J. Colella, E.B. King., Oxford: Oxford University Press (73-88).

Hilton, J.L., von Hippel, W. (1996). Stereotypes. *Annual Review of Psychology* 47: 237-71. https://doi.org/10.1146/annurev.psych.47.1.237.

Kite, M.E., Whitley Jr. B.E. (2016). *Psychology of Prejudice and Discrimination*. New York: Routledge.

Klysing A., Lindqvist A., Björklund F. (2021) Stereotype Content at the Intersection of Gender and Sexual Orientation. *Frontiers in Psychology* 12: 713839. https://doi.org/10.3389/fpsyg.2021.713839.

Schnurr, B., & Fuchs, C. (2022). Public reactions to instances of workplace gender discrimination. *Journal of Experimental Psychology: Applied*. https://doi.org/10.1037/xap0000433.

Stypinska, J., Turek, K. (2017). Hard and soft age discrimination: the dual nature of workplace discrimination. *European Journal of Ageing* 14(1): 49-61. https://doi.org/10.1007/s10433-016-0407-y.

Wynn, A.T., Correll, S. J. (2018). Combating gender bias in modern workplaces. In: *Handbook of the Sociology of Gender*, edited by B.J. Risman, C.M. Froyum, W.J. Scarborough. Cham: Springer (509-521).


Internet sources:

Stereotypes (2015). https://scholar.harvard.edu/files/shleifer/files/stereotypes_june_6.pdf. Accessed: 5.05.2022.

Unconscious bias training: an assessment of the evidence for effectiveness (2018). Equality and Human Rights Commission. https://www.equalityhumanrights.com/sites/default/files/research-report-113-unconcious-bais-training-an-assessment-of-the-evidence-for-effectiveness-pdf.pdf. Accessed: 5.05.2022.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Preventing discrimination and unconscious bias

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic form of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

Recommended training combines different educational tools and is based on active learning. The exemplary methods are:

- Storytelling
- Lectures and discussions
- Group work
- Individual tasks
- Case studies

**Form of basic training**

The basic training will have the form of short webinars and will be only theoretical.

## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- Need to consider the stereotypes and biases present in their culture

## PRACTICAL TIPS AND GUIDELINES

- The training addresses very sensitive issues so it is crucial to create an atmosphere of trust, confidentiality and safeness.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Preventing discrimination and unconscious bias

## USEFUL TERMS AND DEFINITIONS:

**Storytelling** – the vivid description of ideas, beliefs, personal experiences, and life- lessons through stories or narratives that evoke powerful emotions and insights (https://www.researchgate.net/publication/318013495_Storytelling).

**Inclusion** – "the practice or policy of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalised, such as those who have physical or mental disabilities and members of other minority groups" (How to influence inclusivity? https://www.artsprofessional.co.uk/magazine/article/how-influence-inclusivity); "the action or state of including or of being included within a group or structure" (Equity vs. Equality and Other Racial Justice Definitions. https://www.aecf.org/blog/racial-justice-definitions).

**Diversity** – "the practice or quality of including or involving people from a range of different social and ethnic backgrounds and of different genders, sexual orientations, etc. Diversity is all about empowering people by respecting and appreciating what makes them different in regard to age, gender, ethnicity, religion, disability, sexual orientation, education, national origin and other defining factors about their identity" (Diversity, Equity & Inclusion – Definition, Examples. https://unitedwaynca.org/blog/diversity-equity-inclusion/).

**Inappropriate behaviour in the workplace** means that the person behaves in an unprofessional manner and has a problem with respecting the rights of others. This kind of behaviour may include, e.g. harassment, bullying, aggression and violence.

**Cited by Elliot Aronson Timothy D. Wilson Robin M. Akert Samuel R. Sommers:**

Three components of prejudice?

**The Cognitive Component: Stereotypes**

**The Affective Component: Emotions**

**The Behavioural Component: Discrimination**

**Prejudice**:

A hostile or negative attitude toward people in a distinguishable group based solely on their membership in that group; it contains cognitive, emotional, and behavioural components.

Prejudice must include two essential elements: there must be an attitude of favour or disfavour and there must be an overgeneralised, erroneous belief. This definition captures how most people think of prejudice. Contemporary psychologists take a more fine-grained approach, separating beliefs, or stereotypes, from the evaluation component of those beliefs and from the behaviour toward members of the groups about which the beliefs are held (Allport, 1954).

**Stereotype**

A generalisation about a group of people in which certain traits are assigned to virtually all members of the group, regardless of actual variation among the members. Stereotypes are beliefs and opinions about the characteristics, attributes, and behaviours of members of various groups (Hilton & von Hippel 1996).

**Discrimination**

Unjustified negative or harmful action toward a member of a group solely because of his or her membership in that group

**The Effects of Prejudice on the Victim:**

- self-fulfilling prophecy
- stereotype threat

**Culture, gender bias and stereotypes:**

All cultures have established sets of beliefs about men and women and the traits they should possess and roles they should occupy (Becker & Sibley,2016).

Each culture's gender belief system encompasses stereotypes.

## Topic

### 2.7 Building positive relationships and enhancing positive attitudes toward diversity at work
### Part 1 – Conflict resolution

**Toolbox goal:**

☑ knowledge
☑ skills
☑ attitudes

**Participants:**

- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

**Recommended form of training:**

Synchronous face-to-face or online training

**Duration of recommended form of training:**

14h (2x7h with 1-hour lunch break each day)

**Form of basic training:**

Webinar or synchronous online training

**Duration of basic training:**

4h

**Main objective:**

Improving knowledge and awareness about the ways to build positive relationships and resolve conflicts

**Learning results Educational effects**

The participant:

**Specific objectives:**

- improving knowledge and awareness about the phenomenon of conflict
- honing skills helping to meet the interests of both sides of a conflict

- knows the most common drivers of conflicts in their organisational area
- is aware of their "most preferred" attitude to conflicts resolution
- is able to effectively use a couple of methods to solve problems and conduct difficult conversations/negotiate in the spirit of cooperation, with empathy and assertiveness
- can effectively identify the needs of his/her/their partner and reveal his/her/their own interests
- is able to listen actively and use I-messages (shift gears) in difficult situations

## LEARNING AREAS 1/2:

- Introduction to the concept of conflicts and their most frequent drivers:

  - The Circle of Conflict model by Christopher Moore. The five drivers of conflicts: values, relationships, externals, structure, data.

  - Exchange of experiences of participants about good practices and coping.

- An in-depth analysis of the approach to conflicts:

  - How were conflicts dealt with in my family of origin?

  - How are conflicts dealt with in my team?

  - To what extent are conflicts desirable? To what extent is the swift resolution of conflicts being sought?

  - Which resolving strategy is most desirable?

  - "Meta Conflict": what do I feel and what do I think when I experience conflict?

- Thomas-Kilmann model for resolving conflicts.

  - Two dimensions of conflict management: assertiveness and empathy.

  - Five conflict resolution strategies: Competing, Avoiding, Accommodating, Collaborating and Compromising.

  - Self-assessment of one's basic attitude to conflict resolution (with Thomas-Kilmann test).

- Psychological mechanisms of communication that strengthen cooperation

  - Projection and ways to minimise negative projections

  - Projections in the workplace. How to minimise the risk of a negative attitude from colleagues. How to avoid negative projections towards colleagues. How to build an atmosphere of openness and trust in relation to others

  - Norm of reciprocity and the principle of modelling, and how it interferes with building openness.

- The roadblocks to communication by Thomas Gordon.

- Styles of reacting in difficult situations - how to conduct difficult conversations in a spirit of cooperation, with empathy and firmness.

  - Model of Position / Context / Interests and real (unmet) needs of colleagues in difficult situations.

  - Ury and Fisher principles for effective negotiation: separating people from the problem, focusing on interests rather than positions, generating a variety of options before settling on an agreement, insisting that the agreement be based on objective criteria.

  - Conflict Resolution By Thomas Gordon. A six-step process: define the problem in terms of unmet needs, brainstorm to generate as many solutions as possible, evaluate solutions, decide what to do, contract and determine who does what by when, check and re-evaluate.

- Meeting the needs of both sides as a way to solve difficult situations and find the best solutions – how to effectively identify the needs of our partner.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Part 1 – Conflict resolution

## LEARNING AREAS 2/2:

- The "Behaviour Window" by Thomas Gordon and the concept of "problem ownership" as a useful framework helpful while conducting difficult conversations.

- How to "shift gears" from "I-Messages" to "Active Listening" in order to find the best solutions for the situation.

- Active listening. Micro-tool training: questions and paraphrases.

- Using I-Messages. Micro-tool training.

- Practice: Work on case studies reported by the participants. How to negotiate and search for alternative solutions in the spirit of cooperation.

## USEFUL REFERENCES:

Fisher, R., Ury W. (2001). *Getting to Yes: Negotiating Agreement Without Giving In*. New York: Penguin Books.

Gordon, T. (2001). *Leader Effectiveness Training: L.E.T*. New York: TarcherPerigee.

Gordon, T. (2019). *Parent Effectiveness Training: The Proven Program for Raising Responsible Children*. New York: Three Rivers Press.

Moore, C.W. (2014). *The Mediation Process: Practical Strategies for Resolving Conflict*. San Francisco: Jossey-Bass.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Part 1 – Conflict resolution

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants - introduction to the concept of conflict and the above-mentioned models
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations (about the "metaconflict", roadblocks to communication and most common attitudes to conflicts)
- Working in groups about the best practices referring to conflict resolution
- Working in groups about the actions (to be taken) needed to reach one's interests and needs
- Honing tools and ways of active listening
- Honing tools and ways of negotiating in the spirit of cooperation
- Scripts + "knowledge pills" after training (definitions and ways of understanding terms + the most important rules and best practices helpful in gaining better and more satisfactory relationships and resolving difficult situations)

**Form of basic training**

- Webinar presenting the phenomenon of conflict as well as the best practices referring to conflict resolution; during the webinar there will be special time for discussion and Q&A session for participants.
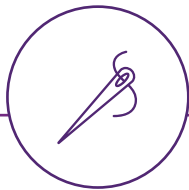
## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- Need to consider the most common drivers of conflicts in their organisations

## USEFUL TERMS AND DEFINITIONS 1/2:

**Chosen definitions and terms:**

**The Circle of Conflict Model by Christopher Moore:**

- The Values section of the Circle of Conflict model "includes all the values and beliefs held by the parties that are contributing to the conflict."
- The Relationship section of the model represents conflicts driven by "specific negative experiences in the past." The parties' negative experiences with one another can lead to "poor or failed communication" and "stereotypes."
- The Externals/Moods section of the model "covers external factors not directly a part of the situation, but that are still contributing to the conflict."
- The Data section of the model identifies incorrect, incomplete, and differential information as a cause of conflict. The section also encompasses differing interpretations of shared information, too much information
- The Structure section of the model refers to the party's interests (needs, wants, fears, and hopes in relation to the conflict)

**Thomas-Kilmann Model for resolving conflicts - two Dimensions of Conflict Management (Assertiveness and Empathy):**

- Assertiveness refers to the ability to speak up and stand by your opinions.
- Empathy refers to understanding another person's point of view and feelings.

**Five conflict resolution strategies** (cited by Gordon Training International):

1. **Competing:** high assertiveness and low empathy. We use competing as a conflict resolution strategy whenever we resort to being aggressive. Drawback: leads to negative emotions such as anger, frustration, aggression and hostility; doesn't help to build good relationships; might result in losing opportunities because the other party doesn't want to work with you anymore.
2. **Avoiding:** low assertiveness and low empathy. This means that you neither take care of your needs nor do you consider or emphasise the other party's needs or point of view. Avoiding is often seen as passive and weak. However, sometimes it seems to be the most profitable or safe way of behaving in conflict. Nevertheless, there are some "better" ways of dealing with conflict.
3. **Accommodating:** low assertiveness and high empathy. This is connected with making concessions.
4. **Collaboration:** high assertiveness and high empathy. The idea is to work together towards achieving a shared goal and fulfil everybody's needs. The main objective is to reach an agreement with each other.
5. **Compromising:** moderate level of both assertiveness and empathy. The idea is to take the middle road between opposing views. This means agreeing to specific terms and giving up on certain other items.

**The roadblocks to communication by Thomas Gordon** (cited by Gordon Training International):

1. Ordering, directing, commanding: "You have to...," "You must...," "You will..."
2. Warning, threatening, admonishing: "If you don't, then...," "You'd better or...," "Stop that, or I'll..."
3. Moralising, preaching, shoulds and oughts: "What you really should do is...," "You ought to...," "It's your responsibility...")
4. Advising, giving solutions, suggesting: "What I would do is...," "Why don't you...," "Let me suggest..."
5. Using logic, arguing: "Doesn't it make sense that if...," "Here's where you're wrong...," "The facts are..."
6. Criticising, judging, blaming: "You aren't thinking clearly...," "You have nobody to blame but yourself...," "I couldn't disagree with you more..."
7. Praising, agreeing, supporting: "I think you did exactly the right thing!" "I couldn't agree more...," "The same thing happened to me..."
8. Labelling, name-calling, ridiculing: "You men always think...," "Okay, Miss Know-It-All..."

## USEFUL TERMS AND DEFINITIONS 2/2:

9. Analysing, interpreting, diagnosing: "You're just trying to...," "Your problem is...," "You probably feel that way because..."

10. Reassuring, sympathising, consoling: "Don't worry...," "Look on the bright side..." "Everyone goes through this..."

11. Questioning, probing, interrogating: "Why did you do that?...," "And then what did you say?...,"

12. Avoiding, diverting, ignoring: "I'd rather not talk about it...," "That's your problem...,„

**The "Behaviour Window" by Thomas Gordon – whose problem is it?** (cited by Gordon Training International):

If the other person is signalling that they are upset or experiencing a problem or concern, that signalling behaviour goes in the top (first) part of the Window. Called **"Other Owns Problem Area."**

If both you and the other person are functioning effectively, i.e., neither of you is bothered or upset, that behaviour (what you both are doing that is effective, etc.) is in the second part of the Window. Called **"No Problem Area"** or **"Productive Work Area."**

When the other person's behaviour is interfering with you, i.e. you are upset, worried, etc., because of something they are doing or saying, that person's behaviour is in the third part of the Window. Called **"I Own a Problem Area."**

When both of you are experiencing upset feelings, i.e. are in conflict with each other, those behaviours are in the fourth (bottom) part of the Window. Called **"We Own a Problem Area."**

Key points about the Behaviour Window and Problem Ownership:

When behaviours of others appear in the top of your Window, i.e., the "cues and clues" that they have a problem, you can effectively support them in solving their own problems by using helping skills-Active Listening.

For those times when the behaviour of others is unacceptable to you, i.e., you own the problem, the Gordon Model recommends constructive way-Confrontive I-Messages.

Sometimes, however, it will become apparent that a conflict exists, i.e., We Own a Problem. These conflicts can often be resolved by using conflict resolution skills.

**Conducting negotiations algorithm:**

1. Start by revealing your "intention" and "human face". Build mutual trust, ensure transparency of communication. Establish and contract rules on which you will resolve problems with your partner.

2. Reach and determine the needs and interests (yours and your partner).

3. Define the problem in terms of unmet needs. Ask the question: "WHAT CAN WE DO TOGETHER TO TAKE CARE OF IT ALL?

4. Generate as many solutions as possible.

5. Evaluate solutions and look for solutions that will meet the needs of both sides.

6. Contract who does what by when.

7. Appreciate the positives throughout the negotiation process. Take care of mutual satisfaction.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Part 1 – Conflict resolution

## PRACTICAL TIPS AND GUIDELINES

- The most recommended form of training is workshop (on-site/stationary). It allows participants to learn about phenomena and get to know some specific information concerning their characteristics, moreover it allows them to gain knowledge from other participants (by working in group), it gives the opportunity to self-analyse and reflect (combined with an exchange of ideas with other Participants)

- Work based on the so-called Kolb's Cycle.

- Before starting the workshop, it is necessary to create an atmosphere of security, openness and discretion among participants (by: initial round, contract, work in smaller configurations)

RESET Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic

### 2.8 Building positive relationships and enhancing positive attitudes toward diversity at work
### Part 2 – Ego states and units of recognition

**Toolbox goal:**

☑ knowledge
☑ skills
☑ attitudes

**Participants:**

- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

**Recommended form of training:**

Synchronous face-to-face or online training

**Duration of recommended form of training:**

14h (2x7h with 1-hour lunch break each day)

**Form of basic training:**

Webinar or synchronous online training

**Duration of basic training:**

4h

**Main objective:**

Improving knowledge and awareness about the ways to build positive relationships

**Learning results
Educational effects**

The participant:

- is aware of his or her dominant ego state and the way the ego state influences interactions and relations
- has knowledge of the phenomena of stroke and types of units of recognition
- is aware of the consequences of using positive or negative strokes
- has knowledge of the main mechanisms and practices that can help to gain more satisfactory relationships
- is aware of his or her stroke economy and its influence on giving and receiving strokes when interacting with others
- is able to effectively use a couple of methods that are helpful in giving and receiving strokes

**Specific objectives:**

- improving knowledge and awareness about the phenomena of ego states and strokes (units of interpersonal recognition)
- recognizing hunger need and its importance while being in relation with others

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Part 2 – Ego states
and units of recognition

## LEARNING AREAS:

- An introduction to Transactional Analysis: the basics, Transactions, Psychological Needs (Hungers)

- Ego states and Transactions and their impact on our daily interactions - assessment of one's egogram

- Existential Positions and self-assessment of one's basic life position

- The phenomenon of stroke as a "unit of human recognition" and its similarity to such constructs as: attachment, intimacy, warmth, need to belong, contact, closeness

- Types of recognition signs: positive or negative, unconditional or conditional, verbal on nonverbal

- Mechanisms and best practices referring to strokes exchange that are helpful in building good relationships

- The stroke economy by Claude Steiner – 5 unhelpful rules about stroking

- Self-reflection and assessment of one's stroke economy and possible consequences for other people and relationships

- How to improve the stroke economy and exchange of units of recognition – useful tips and methods helpful to: give strokes, ask for strokes, accept strokes, reject strokes, stroke oneself

## USEFUL REFERENCES:

Berne, E. (2001). *Transactional Analysis in Psychotherapy: The Classic Handbook to Its Principles*. London: Souvenir Press.

Hay, J. (2009). *Transactional Analysis For Trainers*. Philadelphia: Sherwood Publishing.

Solomon, C. (2003). Transactional Analysis Theory: The Basics. *Transactional Analysis Journal* 33(1): 15-22. https://doi.org/10.1177/036215370303300103.

Steiner, C. (2003). Core Concepts of a Stroke-centered Transactional Analysis. *Transactional Analysis Journal* 33: 178-181. https://doi.org/10.1177/036215370303300209.

Steiner, C.M. (1971). The Stroke Economy. *Transactional Analysis Journal* 1(3): 9-15. https://doi.org/10.1177/036215377100100305.

Woods, K. (2007). The Stroking School of Transactional Analysis. *Transactional Analysis Journal* 37(1): 32-34. https://doi.org/10.1177/036215370703700105.

Part 2 – Ego states
and units of recognition

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

**RESET**
Redesigning
Equality and
Scientific
Excellence
Together

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic form of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants - introduction to Transactional Analysis, Ego States and the concept of stroke
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations (about the Transactions from each Ego State, phenomenon of stroke and types of units of recognition)
- Working in groups about the best practices referring to strokes exchange
- Working in groups about the actions (to be taken) needed to improve chosen relationships
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations (about the stroke economy)
- Honing tools and ways of reacting in groups
- Scripts + "knowledge pills" after training (definitions and ways of understanding terms + the most important rules and best practices helpful in gaining better and more satisfactory relationships)

**Form of basic training**

- Webinar presenting the phenomena of Ego States and strokes as well as the best practices referring to strokes exchange; during webinar there will be special time for discussion and Q&A session for participants

## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- Need to consider the specificity of strokes exchange referring to national and socio-cultural contexts

This project has received funding from the European Union's Horizon 2020 Framework Program for Research and Innovation under Grant Agreement no 101006560.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUB RUHR UNIVERSITÄT BOCHUM · SciencesPo

## USEFUL TERMS AND DEFINITIONS 1/2:

**Chosen definitions and terms:**

(source: Solomon, C. [2003]. Transactional Analysis Theory: The Basics. *Transactional Analysis Journal* 33(1): 15-22. https://doi.org/10.1177/036215370303300103).

**Ego States:**

Each of our personalities is made up of various parts: the Parent, the Adult, and the Child ego states.

The Parent ego state is a set of thoughts, feelings, and behaviours that are learned or "borrowed" from our parents or other caretakers. The Parent ego state can be divided into two functions. One part includes the nurturing side and can be soft, loving, and permission giving. This is called the Nurturing Parent ego state. It can also set limits in a healthy way.

The other side of the Parent ego state is called the Critical Parent. (It is also sometimes called the Prejudiced Parent.) This part of our personality contains the prejudged thoughts, feelings, and beliefs that we learned from our parents. Some of the messages that we hold in our Parent ego state can be helpful in living while other Parent messages are not.

The Adult ego state is our data-processing centre. It is the part of our personality that can process data accurately, that sees, hears, thinks, and can come up with solutions to problems based on the facts and not solely on our prejudged thoughts or childlike emotions.

The Child ego state is the part of our personality that is the seat of emotions, thoughts, and feelings and all of the feeling state "memories" that we have of ourselves from childhood.

The Child ego state can be divided into two parts: the Free Child ego state (also referred to as the Natural Child) and the Adapted Child ego state (which also contains the Rebellious Child ego state).

**Existential Positions:**

It is a basic life position that influences how we view our own and others' existence. There are four basic life positions.

1. I'm OK, You're OK
2. I'm OK, You're Not OK
3. I'm Not OK, You're OK
4. I'm Not OK, You're Not OK

Most babies are born in the position of feeling OK about themselves and OK about others. If things go well they will be able to maintain that position throughout their life.

If a child is treated badly or abused, this may result in his or her feeling helpless, powerless, and angry, and he or she may move into a position of believing "I'm OK, You're Not OK."

If a child is not well cared for and receives script messages that decrease his or her sense of self-worth, that child might move into the position of feeling that he or she is not OK while others are OK.

When things really go wrong during childhood, a person might end up in the existential position of "I'm Not OK, You're Not OK." This is the life position of despair. The person in this position has great difficulty seeing the good in anyone and has trouble having any hope for the future.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Part 2 – Ego states
and units of recognition

## USEFUL TERMS AND DEFINITIONS 2/2:

**Strokes:**

Stroke is a "unit of human recognition." A stroke can be a look, a nod, a smile, a spoken word, a touch. Any time one human being does something to recognise another human being, that is a stroke. Babies need strokes to survive.

"People need strokes to survive physically and psychologically. Stroke hunger is a form of informational hunger, which is a fundamental, constant, and pervasive drive in all living beings" (Steiner 2003, 178).

The exchange of strokes is one of the most important activities in which people engage in their daily lives. The recognition is a basic, biological need with profound motivational implications. Contact or strokes are essential to a person's life. Without them, Berne said, "the spinal cord will shrivel up."

**Examples of strokes:**

**Positive:** *I love you, You are my best friend. I like the way you did this report. Your work is really extraordinary.*

**Negative:** *I hate you, You are the worst coworker I have ever worked with. This presentation is awful.*

**Unconditional strokes:** are those that come to us just for being. They are a very rich kind of strokes.

E.g. *I like You, You are an excellent Leader.*

**Conditional strokes:** are given for what we do, for what we accomplish, or for a particular trait that we happen to possess. Thus, they are based on some condition.

E.g. *You did your work very well yesterday.*

**Mechanisms referring to strokes and best practices useful in building satisfactory relationships:**

1. Give people positive strokes. There cannot be "too many" positive strokes, as long as they are true.
2. Avoid giving negative strokes.
3. The "healthy ratio" is 3: 1 (positive to negative).
4. Better any sign of recognition than none. When people are not able to get positive strokes, they will make their best effort to get negative ones, since negative strokes are better than no strokes at all.
5. Unconditional strokes are stronger than conditional ones.
6. Unshown (or unspoken) positive critical signs of recognition (critical feedback) are negative signs of recognition.
7. Everyone has their own individual pattern of strokes exchange.
8. The space and organisation of work have an impact on the patterns of the strokes exchange.
9. Each change in the system means the necessity to build a new system for the exchange of strokes.
10. Building relationships needs time. Be patient and take care of the amount of recognition you give to other people.

**5 myths (unhelpful rules) about how we give and receive strokes, that we learn from our parents/elders:**

1. Don't give strokes you would like to give
2. Don't ask for strokes you would like to receive
3. Don't accept strokes you would like to accept
4. Don't reject strokes you don't want
5. Don't give yourself strokes

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Part 2 – Ego states and units of recognition

## PRACTICAL TIPS AND GUIDELINES

- The most recommended form of training is workshop (on-site/stationary). It allows participants to learn about phenomena and get to know some specific information concerning their characteristics, moreover it allows them to gain knowledge from other participants (by working in group), it gives the opportunity to self-analyse and reflect (combined with exchange of ideas with other Participants)

- Work based on the so-called Kolb's Cycle.

- Before starting the workshop, it is necessary to create an atmosphere of security, openness and discretion among participants (by: initial round, contract, work in smaller configurations)

## Topic

### 2.9 Building positive relationships and enhancing positive attitudes toward diversity at work
### Part 3 – TA games

**Toolbox goal:**

☑ knowledge
☑ skills
☑ attitudes

**Participants:**

- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

**Recommended form of training:**

Synchronous face-to-face or online training

**Duration of recommended form of training:**

14h (2x7h with 1-hour lunch break each day)

**Form of basic training:**

Webinar or synchronous online training

**Duration of basic training:**

4h

**Main objective:**

Improving knowledge and awareness about the ways to build positive relationships

**Learning results**
**Educational effects**

The participant:

- is aware of the universality of games
- has a knowledge of a game sequence and roles in a Drama Triangle
- is aware of his/her/their "favourite" role and most commonly-played games
- has knowledge of the phenomena of games
- is aware of the consequences and payoffs of playing games, can find alternative ways (opposite to games) of being in a relation
- has knowledge of the main mechanisms and practices that can help to gain intimacy and deal with games
- is able to effectively use a couple of methods helpful in dealing with games

**Specific objectives:**

- improving knowledge and awareness about the phenomena of TA games
- honing skills and tools useful for minimising conflicts and gain intimacy with others

université BORDEAUX   ARISTOTLE UNIVERSITY OF THESSALONIKI   U.PORTO   UNIVERSITY OF LODZ   UNIVERSITY OF OULU   RUB RUHR UNIVERSITÄT BOCHUM   SciencesPo

**RESET** — Redesigning Equality and Scientific Excellence Together

## LEARNING AREAS:

- An introduction to Transactional Analysis/reminding the basics of TA: Ego states, Transactions, Psychological Needs (Hungers), Existential Positions, Strokes

- Time structuring - six modes of time structuring: withdrawal, rituals, pastimes, activities, games, intimacy

- Definition of games in TA, game sequence (Formula G), typical features of games

- Different Degrees of Games

- Games and discounting others

- Games and conflicts

- Drama Triangle by Stephen Karpman and 3 script roles: Persecutor, Rescuer, Victim

- Why do people play games? Possible payoffs of games.

- A list of the most commonly-played games + self – assessment "which games do I play?"

- How to deal with games and step into intimacy in order to reduce the probability of conflict

- Contracting collaboration as a useful way of dealing with games

- Giving feedback and talking about needs as essential ways of minimising the probability of stepping into a game

## USEFUL REFERENCES:

Berne, E. (2001). *Transactional Analysis in Psychotherapy: The Classic Handbook to Its Principles*. London: Souvenir Press.

Berne, E. (1964). *Games People Play: The Psychology of Human Relationships*. New York: Grove Press.

Berne, E. (1972). *What Do You Say after You Say Hello? The Psychology of Human Destiny*. New York: Grove Press.

Hay, J. (2009). *Transactional Analysis For Trainers*. Philadelphia: Sherwood Publishing.

Solomon, C. (2003). Transactional Analysis Theory: The Basics. *Transactional Analysis Journal* 33(1): 15-22. https://doi.org/10.1177/036215370303300103.

Stewart, I., Joines V.S. (2008). *TA Today. A New Introduction to Transactional Analysis*. Nottingham/Chapel Hill: Lifespace Publishing.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUB RUHR UNIVERSITÄT BOCHUM · SciencesPo

RESET Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants – introduction to Transactional Analysis, Definition of Games and their typical features
- Working in groups about the game sequence and roles in Drama Triangle (based on a case study)
- Working in groups about the payoffs of games
- Working in groups about the actions (to be taken) needed to deal with games
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations (about the games that I used to play)
- Honing tools and ways of reacting in groups
- Scripts + "knowledge pills" after training (definitions and ways of understanding terms + the most important rules and best practices helpful in gaining better and more satisfactory relationships)

**Form of basic training**

- Webinar presenting the phenomenon of games as well as the best practices referring to dealing with games and gaining intimacy; during the webinar there will be special time for discussion and Q&A session for participants

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to think over the most commonly-used games in their organisations

# USEFUL TERMS AND DEFINITIONS:

**Chosen definitions and terms:**

"A game is a series of ulterior transactions with a gimmick, leading to a usually well-concealed but well-defined payoff." Berne (1964)

"A series of duplex transactions which leads to a switch and a well-defined, predictable payoff which justifies a not-OK, or discounted, position." Brown (1978)

Games are one of the ways of structuring time, and therefore a certain type of entering into relationships with other people to meet our needs (hungers).

Games are a reconstruction of childhood strategies, immature and inadequate to reality. At the same time, playing games is a very common, unconscious, automatic way of getting into relationships.

Games take place according to repetitive patterns (when ending a game we may have the feeling that "the same thing has happened again"), a certain pattern of relationships, transactions we have played with another person who is known to us.

**Typical Features of games by Stewart, I., Joines, V.S. (2008).**

1. Games are repetitive. Each person plays her favourite game through time and time again. The other players and the circumstances may change, but the pattern of the game remains the same.

2. Games are played without Adult awareness. Despite the fact that people repeat games over and over, they go through each replay of their game without being aware they are doing it. It's not until the closing stages of the game that the player may ask himself: 'How did that happen again?' Even at that point, people usually don't realise that they themselves have helped set up the game.

3. Games always end up with the players experiencing racket feelings.

4. Games entail an exchange of ulterior transactions between the players.

**Different Degrees of Games Game:**

1. A first-degree game has an outcome which the player is willing to share with her social circle.

2. Games played at a second-degree level bring heavier outcomes, of a kind which the player would rather not make public in her social circle.

3. A third-degree game, in Berne's words, '...ends in the surgery, the courtroom or the morgue.'

**Roles in a Drama Triangle:**

Persecutor: is someone who puts other people down and belittles them. The Persecutor views others as being one-down and not-OK.

Rescuer: sees others as being not-OK and one-down. But the Rescuer responds by offering help from a one-up position. She believes: it is needed to help all these others because they're not good enough to help themselves.

Victim: it is himself who is one-down and not-OK. Sometimes the Victim will seek a Persecutor to put him down and push him around. Or the Victim may be in search of a Rescuer, who will offer help and confirm the Victim's belief that they can't cope on their own.

**A list of the most commonly-played games**:

- Cops and Robbers
- Blemish
- If It Weren't For You
- Now I've Got You, Son of a Bitch (NIGYSOB)
- Yes, But…
- Rapo
- Wooden Leg
- I'm Only Trying To Help You.
- Why Don't You...?
- See How Hard I've Tried

Part 3 – TA games

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## PRACTICAL TIPS AND GUIDELINES

- The most recommended form of training is workshop (on-site/stationary). It allows participants to learn about phenomena and get to know some specific information concerning their characteristics, moreover it allows them to gain knowledge from other participants (by working in a group), it gives the opportunity to self-analyse and reflect (combined with exchange of ideas with other Participants)

- Work based on the so-called Kolb's Cycle.

- Before starting the workshop, it is necessary to create an atmosphere of security, openness and discretion among participants (by: initial round, contract, work in smaller configurations)

RESET | Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic

### 2.10 Work-life Balance – orientation on knowledge competencies improvement
### Part 1

---

**Toolbox goal:**

☑ knowledge
☐ skills
☐ attitudes

---

**Participants:**

- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

---

**Recommended form of training:**

Synchronous face-to-face or online training

---

**Duration of recommended form of training:**

8h (2x4h)

---

**Form of basic training:**

Online webinar

---

**Duration of basic training:**

2h

---

**Main objective:**

Improving knowledge and awareness about the phenomena of work-life balance

**Specific objectives:**

- improving knowledge and awareness about the phenomena of work-life balance
- focusing on understanding the mutual relations between work and nonwork domains (conflicts and facilitation)

---

**Learning results**
**Educational effects**

The participant:

- has knowledge about mutual relations between work and nonwork domains with the focus of bidirectional (nonwork-to-work and work-to-nonwork) 'carry over' of demands
- has knowledge of the main causes of conflicts between work and other non-work responsibilities and activities
- is aware of the costs and consequences of the imbalance between work and nonwork domains
- has knowledge of the main techniques that can help to gain balance in a long time perspective as well as mix work and nonwork domains in a "good" (non harmful) way

---

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 1

## LEARNING AREAS:

- Definitions and terms referring to Work/Life Balance, need to give a broader work/life connotation in opposition to the past focus on work and family relationships (e.g., quality of life, flexible work options, life balance, etc.)
  - equity across multiple roles
  - satisfaction between multiple roles
  - relationship between conflict and facilitation
  - perceived control between multiple roles
  - changes over time that require various focus of demands fulfilment
- Determinants of work-life balance: individual, family, work and organisation
- (Job) Demands-Resources model (JD-R model; Bakker and Demerouti, 2007) as a useful framework for assessing oneself work and nonwork domain.
- Demands fulfilment, time involvement and pressure as significant characteristics of multiple roles in an individual's life.
- Consequences of work-life imbalance, e.g., overall well-being and dissatisfaction from life, health problems, family problems, work and life burnout, bad performance, sickness absence, decrease of organisational commitment.
- Work/Life Balance and gender – why are there still other challenges for men and women?
- Is it possible to gain ideal balance between work and nonwork domains?
- What can be done to balance effectively between work and nonwork domains and maintain overall well-being?
  - Best practices and main hygiene rules
  - Contracting as a way to meet work and nonwork commitments and take care of oneself – useful rules referring to Work/Life Balance
- Does my behaviour enhance work-life imbalance?
  - the rule of reciprocity
  - social proof of rightness
  - learning by observation

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 1

## USEFUL REFERENCES:

Aryee, S. (1992). Antecedents and Outcomes of Work-family Conflict among Married Professional Women: Evidence from Singapore. *Human relations* 45(8): 813-837. https://doi.org/10.1177/001872679204500804.

Bakker, A.B., Demerouti E. (2007). The Job Demands-resources Model: State of the Art. *Journal of Managerial Psychology* 22: 309-328. https://doi.org/10.1108/02683940710733115.

Carlson, D.S., Kacmar K.M., Wayne J.H., Grzywacz J.G. (2006). Measuring the Positive Side of the Work-family Interface: Development and Validation of a Work-family Enrichment Scale. *Journal of Vocational Behavior* 68: 131-164. https://doi.org/10.1016/j.jvb.2005.02.002.

Greenhaus, J.H., Powell G.N. (2006). When Work and Family Are Allies: A theory of Work-family Enrichment. *Academy of Management Review* 31(1): 72-92. https://doi.org/10.5465/AMR.2006.19379625.

Greenhaus, J.H., Beutell N. (1985). Sources of Conflict between Work and Family Roles. *Academy of Management Review* 10: 76-88. https://doi.org/10.2307/258214.

Greenhaus, J.H., Collins K.M., Shaw J.D. (2003). The Relation between Work-family Balance and Quality of Life. *Journal of Vocational Behavior* 63: 510-531. https://doi.org/10.1016/S0001-8791(02)00042-8.

Grzywacz, J.G., Bass B.L. (2003). Work, Family and Mental Health: Testing Different Models of Work-family Fit. *Journal of Marriage and Family* 65: 248-261. https://doi.org/10.1111/j.1741-3737.2003.00248.x.

Luk, D.M., & Shaffer M.A. (2005). Work and Family Domain Stressors and Support: Within-and Cross-domain Influences on Work-family Conflict. *Journal of Occupational and Organizational Psychology* 78(4): 489-508. https://doi.org/10.1348/096317905X26741.

Maslach, C., Schaufeli W.B., Leiter M.P. (2001). Job Burnout. *Annual Review of Psychology* 52: 397-422. https://doi.org/10.1146/annurev.psych.52.1.397.

McMillan, H.S., Morris M.L., Atchley, E.K. (2011). Constructs of the Work/Life Interface: A Synthesis of the Literature and Introduction of the Concept of Work/Life Harmony. *Human Resource Development Review* 10: 6-25. https://doi.org/10.1177/1534484310384958.

Schaufeli, W.B., Bakker A.B., Van Rhenen W. (2009). How Changes in Job Demands and Resources Predict Burnout, Work Engagement, and Sickness Absenteeism. *Journal of Organizational Behavior* 30: 893-917. https://doi.org/10.1002/job.595.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 1

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic form of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants - introduction to concept of work-life balance and work-life mix
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations (about the phenomena and causes of imbalance: have I experienced such a state, how does my work demands and life demands look like, what are my resources, have I experienced any positive impacts of my work into nonwork domains and the opposite, does my behaviour or the behaviour of others enhance work-life imbalance)
- Working in groups about the consequences of work-life imbalance, possible use of case studies
- Working in groups about the actions and rules useful in taking care of proper work-life mix
- Scripts + "knowledge pills" after training (definitions and ways of understanding terms + the most important rules and best practices helpful in gaining proper well-being)

**Form of basic training**

- Webinar presenting work-life relations, the causes and consequences of work-life balance as well as imbalance; during the webinar there will be special time for discussion and Q&A session for participants
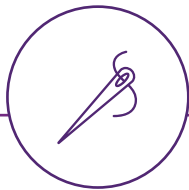
## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- Need to collect data concerning national and socio-cultural contexts of above mentioned phenomena, with the special focus of gender differences.

## USEFUL TERMS AND DEFINITIONS 1/2:

**Chosen definitions of work – life balance:**

"A state of equilibrium in which the demands of both a person's job and personal life are equal" Ezzedeen, S. R., & Swiercz, P. M. (2002).

An individual's ability to meet their work and family commitments, as well as other non-work responsibilities and activities. Work life balance, in addition to the relations between work and family functions, also involves other roles in other areas of life.

….recent shift in terminology used to refer to this phenomenon, with many organisations using the term 'work–life balance' so as to include employees who are not parents but who desire balance for non-work activities such as sports, study, and travel. Kalliath, T., Brough, P. (2008).

Work–family balance reflects an individual's orientation across different life roles, an inter-role phenomenon' Greenhaus, Collins, Shaw (2003)

**The JD-R model:**

The JD-R model, an alternative to other models of employee health and well-being, such as Karasek's (1979) job demand-control model and Siegrist (1996, 2002) effort-reward imbalance model.

The JD-R model was initially applied to burnout, its extended version can also be applied to work engagement.

Main assumptions: in any job, two kinds of characteristics can be distinguished that are related to burnout and work engagement: job demands and job resources.

Job demands refer to "physical, psychological, social, or organisational aspects of the job that require sustained physical and/or psychological (cognitive and emotional) effort or skills and are therefore associated with certain physiological and/or psychological costs" (Bakker & Demerouti, 2007, p. 312).

Job resources refer to physical, psychological, social, or organisational aspects of the job that may be functional in meeting job requirements and may thus reduce the associated physiological and/or psychological costs and/or stimulate personal growth and development.

Job resources can be located in the work context (at the level of the organisation, such as pay, career opportunities, job security), in interpersonal and social relations (e.g., supervisor support), or in the tasks themselves (e.g., performance feedback, skill variety, and autonomy)

**Useful questions to assess your workplace referring to work-life balance:**

Please consider how your colleagues care (or do not care) for the work – life balance.

- Is there any permission in your team for overtime work, late hours calls, extending meetings or other activities that, from your point of view, disrupt the relationship between work and private life?
- Do you have established norms / rules that allow you to take care of your balance and avoid overloading?
- Is it allowed to set boundaries and clearly inform others that certain activities interfere with your requirements and needs from other domains of life?
- Do you show concern for each other when someone from your team is overloaded and struggling to cope with work or nonwork requirements?

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 1

## USEFUL TERMS AND DEFINITIONS 2/2:

**Best practices referring to psychological and physical well-being:**

You can:

- Monitor your tension level and adequately reduce its intensity.
- Regenerate whenever you can.
- Take breaks (frequent, short).
- Take care of working conditions (especially when working remotely online).
- Plan your work so as to keep a buffer for unforeseen things.
- Keep moving (especially when working remotely online).
- "Do yourself well" every day (reward, time for yourself ONLY), even if it's for 10 minutes.
- Take a moment for small-talk.
- Take care of an appropriate intensity of duties, tasks and support from others.
- Build resources and new habits.

## PRACTICAL TIPS AND GUIDELINES

- The most recommended form of training is workshop (on-site/stationary). It allows participants to learn about phenomena and get to know some specific information concerning their characteristics, moreover it allows them to gain knowledge from other participants (by working in group), it gives the opportunity to self-analyse and reflect (combined with exchange of ideas with other Participants)

- Work based on the so-called Kolb's Cycle.

- Before starting the workshop, it is necessary to create an atmosphere of security, openness and discretion among participants (by: initial round, contract, work in smaller configurations).

- It is useful to have a look at GEP-implemeting partners in RESET to analyse how WLB is addressed by various institutions in their Gender Equality Plans.

## Topic

### 2.11 Work-life Balance – orientation on skills competencies improvement Part 2

**Toolbox goal:**

☐ knowledge
☑ skills
☐ attitudes

**Participants:**

- Top and middle management
- Researchers
- Teachers
- Administration staff
- PhD students, students

**Recommended form of training:**

Synchronous face-to-face or online training

**Duration of recommended form of training:**

8h (2x4h)

**Form of basic training:**

Synchronous online training

**Duration of basic training:**

4h

**Main objective:**

Honing skills that allow participants to gain proper work - life balance and reduce imbalance

**Learning results Educational effects**

The participant:

**Specific objectives:**

- learning about useful tools and methods referring to work-life balance: contracts, assertive request, assertive refusal
- training and honing known tools and methods with real situations of the participants
- exchange of ideas of most effective rules and ways of contracting useful in gaining proper balance between work and nonwork domains
- exchange of ideas of useful ways to deal with overload and reduce requirements from multiple roles

- knows useful rules and principles that allow to set boundaries between work and nonwork domains or gain high level of well-being
- knows how to contract cooperation and joint functioning in order to take care of work – life balance
- can ask for help/support/reduce requirements when experiencing difficult situations or overload
- can refuse/reject demands in an assertive way when experiencing difficult situations or overload

RESET
Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 2

## LEARNING AREAS:

- Reminding of the most important information about work – life balance and imbalance

- Definition of contract by Transactional Analysis.

- Three levels of contract by Berne: the administrative or procedural level, the professional level, the psychological level

- Three-cornered contract by English: the relationships between three subjects in organisation ("Big Powers")

- Algorithm for contracting cooperation with a colleague or a team. A way of establishing mutual rules and principles that enhance work-life balance and reduce imbalance

- Practice: Work with case studies of real business training with diagnostic and corrective staging – recordings. Practice of the contracting algorithm on real situations reported by the participants

- Algorithm for assertive request. A way of asking for support/reduce requirements when experiencing difficult situations or overload.

- Practice: Work with case studies of real business training with diagnostic and corrective staging – recordings. Practice of the assertive request algorithm on real situations reported by the participants

- Algorithm for assertive refusal. A way of rejecting demands when experiencing difficult situations or overload

- Practice: Work with case studies of real business training with diagnostic and corrective staging – recordings. Practice of the assertive refusal algorithm on real situations reported by the participants

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 2

## USEFUL REFERENCES:

Laugeri, M. (2020). Emerging Change: A New Transactional Analysis Frame for Effective Dialogue at Work. *Transactional Analysis Journal* 50(2): 143-159. https://doi.org/10.1080/03621537.2020.1726660.

Pipas, M.D., Jaradat M. (2010). Assertive Communication Skills. *Annales Universitatis Apulensis: Series Oeconomica* 12(2): 649. https://doi.org/10.29302/oeconomica.2010.12.2.17.

Rotondo, A. (2020) Rethinking Contracts: The Heart of Eric Berne's Transactional Analysis. *Transactional Analysis Journal* 50(3): 236-250. https://doi.org/10.1080/03621537.2020.1771032.

Samfira, E.M. (2020). Assertive Communication Skills in Universities. *Educația Plus* 26(1), 361-373. https://doi.org/10.24250/JPE/1/2020/EMS.

Stummer, G. (2002). An Update on the Use of Contracting. *Transactional Analysis Journal* 32(2): 121-123. https://doi.org/10.1177/036215370203200207.

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic form of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Lecture and discussion with participants – learning about chosen ways of contracting and reducing overload
- Working on real difficult situations of the participants using so-called Tool Coaching
- Honing tools and ways of reacting in groups
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Group discussion - exchange of ideas and good practices

**Form of basic training**

- Lecture and discussion with participants – learning about chosen ways of contracting and reducing overload
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Honing tools and ways of reacting in groups
- Group discussion - exchange of ideas and good practices

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to figure out the most common constraints and obstacles characteristic for specific country that hinder the right balance between work and nonwork areas

- Need to find national and organisational policies, frameworks or guidelines that enhance the right balance between work and nonwork areas, with the emphasise on the time for family

- Need to collect examples of good practices about work-life balance solutions being used in their organisations

## USEFUL TERMS AND DEFINITIONS 1/2:

**Definition of contract by Transactional Analysis:**

"..explicit bilateral commitment to a well-defined course of action" (Berne, 1966, p. 362)

**Contracting algorithm:**

1. Describe the purpose and the meaning of the contracting. Reveal why you want to make an arrangement with others and underline how it can help in cooperation.

2. Name the 3 contract levels and describe the content of each level.

3. Name your needs, requests and expectations as well as rules that can help to reduce imbalance. Justify why it is important to you (how and in what way it will help you). Remember about 3 levels of contract.

4. Ask about the ideas, important needs, expectations of the partner / colleagues.

5. Summarise and confirm the contract. Point out those places where you agree and those that you still need to talk about or ask for intervention from the leader. Sign useful rules.

6. Appreciate the commitment of the partner / colleagues.

**Refusal algorithm:**

1. **Take care of relationships - reveal your intention**

   To reduce the psychological cost of refusal, it is helpful to establish a relationship before you refuse. Reveal your intention and possible fears that accompany you in this situation.

2. **Say NO – be specific about what you will not do**

   It is important that you say NO clearly and firmly, while adding specifically what your refusal is about.

3. **Justify your refusal**

   Remember that people will understand your decision more easily if you give them a real justification based on your needs.

4. **Defense your decision ("Broken record" method)**

   - listen
   - paraphrase
   - reveal the intention
   - defend your decision with true reasons referring to your needs

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Work-life Balance – Part 2

## USEFUL TERMS AND DEFINITIONS 2/2:

5. **Ask about your partner's needs**

   The idea behind this technique is to build agreement and proper relationships while refusing other people.

   In order to build rapport, it is worth to find out why this request / expectation is so important to your partner. What are his / her / their needs. Maybe there is a chance that you can help him / her / their in another way or another time.

6. **Ask for cooperation**

   In order to build an understanding, it is worth showing your willingness to help. Just because you decline to comply with a request does not mean that you do not care about the relationship or help in another way.
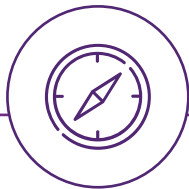
## PRACTICAL TIPS AND GUIDELINES

- The most recommended way of training is based on so-called Tool Coaching.

- During algorithm training in groups, it is important to encourage every participant to work on her/his/their real situations or (at least) try to role-play and give feedback to others.

- The training method and work rhythm need to be adjusted to the group dynamics and the stage of the group process: training in pairs / groups, training by putting a person in the spotlight, work with a camera and analysis of diagnostic roleplays.

## Topic

### 2.12 GEP implementation – orientation on knowledge competencies improvement
### Part 1

**Toolbox goal:**

☑ knowledge
☐ skills
☐ attitudes

**Participants:**

- Top and middle management
- Administrative staff
- Academic staff

**Recommended form of training:**

Synchronous face-to-face training

**Duration of recommended form of training:**

7h with 1-hour lunch break

**Form of basic training:**

Synchronous online training

**Duration of basic training:**

4h

**Main objective:**

The main goal of the training is to get acquainted with the idea and the importance of GEP document in the HEIs.

**Learning results
Educational effects**

The participant:

- knows about the importance of gender equality in the EU
- understands the idea of GEP in the process of HEIs management
- is able to indicate the priorities of GEP design
- knows the necessity of GEP implementation and its consequences for the different processes in academia
- is aware which stakeholders inside and outside of the academia to involve in the process of design and implementation of GEP
- is aware of possible challenges and resistance during the process of designing and implementation of GEP

**Specific objectives:**

- learning about gender equality at the EU level
- learning about the GEP as a strategic document for HEIs
- setting main goals of GEP in relation to the need of institutional change
- learning about the stages of GEP design
- learning about formal and informal consequences of GEP implementation
- learning about the role of different academic stakeholders/units in GEP designing and revising
- getting to know the institutional risks, challenges and potential resistance from various bodies/stakeholders throughout the process of designing and implementation of GEP

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## LEARNING AREAS:

- The idea of gender equality at the HEIs from the European perspective.
  - The EU regulations on gender equality.
  - Data on gender (inequalities) in different areas of social and economic life. Gender equality index.
  - The idea of GEP.
  - The role of GE in academia at the national level (national/regional policies, governmental/municipal bodies responsible for GE).
- GEP as a strategic tool (and the first step) for enhancing GE in HEIs.
  - The importance of GEP integration with strategy and mission statement of HEI
  - Top management's responsibilities for strategic orientation on GEP implementation
- How to design GEP taking into consideration national and institutional specificities (GEP composition)?
- GEP step by step
  - Introduction to GEP implementation – GEP composition.
  - The main goals of GEP and steps to follow in the process of data gathering and setting the objectives.
  - The issue of creating a GE-friendly environment by GEP in academia.
- Consequences of GEP approval.
- Challenges, risks and possible resistances to the GEP implementation.
- The role and responsibilities of different units and stakeholders.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

GEP implementation – Part 1

## USEFUL REFERENCES:

Acker, J. (1989). The Problem with Patriarchy. *Sociology* 23(2): 235-240. https://doi.org/10.1177/0038038589023002005.

Acker, J. (1990). Hierarchies, Jobs, Bodies: A Theory of Gendered Organizations. *Gender & Society*, 4(2): 139-158. https://doi.org/10.1177/089124390004002002.

Clavero, S., Galligan Y. (2021). Delivering Gender Justice in Academia Through Gender Equality Plans? Normative and Practical Challenges. *Gender, Work & Organization* 28(3): 1115-1132. https://doi.org/10.1111/gwao.12658.

Rosa, R. (2022). Gender Equality in Higher Education and Research. *Journal of Gender Studies* 31(1):1-7. https://doi.org/10.1080/09589236.2022.2007446.


Internet sources:

Gender Equality Strategy. https://ec.europa.eu/info/policies/justice-and-fundamental-rights/gender-equality/gender-equality-strategy_en. Accessed: 30.08.2022.

Gender Equality Plan. https://eige.europa.eu/gender-mainstreaming/toolkits/gear/what-gender-equality-plan-gep. Accessed: 30.08.2022.

The Gender Equality Plan Eligibility Criterion in HE: Who is Concerned? How to Comply with It? https://www.youtube.com/watch?v=0gZyhhnStX4. Accessed: 30.08.2022.

Gender Equality Academy Webinars' Series: Introduction to Gender Equality Plans. https://www.youtube.com/watch?v=x6zgcHyDe5o. Accessed : 30.08.2022.

Horizon Europe Guidance on Gender Equality Plans. https://www.kpk.gov.pl/wp-content/uploads/2021/09/KI0221806ENN.en_.pdf. Accessed: 30.08.2022.

Martinez, H. (2022). What is Gender Equality ? Learn the definition with examples. https://unitedwaynca.org/blog/what-is-gender-equality/. Accessed : 22.11.2022.

National regulations on gender equality and GEP implementation.

## METHODS AND TRAINING ACTIVITIES:

Both in the recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- Brainstorming about the concept, history and current understandings of gender equality
- Lecture and discussion about the gender (in)equality issues from economic, social, political, cultural and environmental perspectives at the EU, national, regional and institutional levels
- Discussion about the concept of gender equality as rooted in academia and HEIs
- Lecture about GEP designing, i.e., steps and processes to follow
- Data-based approach in GEP writing illustration from implementing partners
- The practical exercise on what kind of data is required to set GE goals
- SMART rule in GEP
- Mind map about responsibilities of different groups of stakeholders resulting from GEP

**Form of basic training**

The minimum number of hours to present the idea of GE and GEP is 4 hours (in the basic form of training). Main attention should be placed on national and organisational context to explain the role and function of GEP in improving the gender sensitive culture. The online training will be less interactive, but it is strongly recommended to introduce some small tasks such as e-brainstorm to engage people in active participation.

- Brainstorming
- Lecture and discussion
- Data-based approach in GEP writing illustration from RESET implementing partners
- SMART rule in GEP

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to find the information about the national and institutional policies for GE (existing documents, policies, frameworks), especially at the level of tertiary education.
- Examples of GEPs from different HEIs.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

GEP implementation – Part 1

## USEFUL TERMS AND DEFINITIONS 1/2:

**Gender equality** – equal rights, responsibilities and opportunities of women and men and girls and boys (EIGE. https://eige.europa.eu/thesaurus/terms/1168) and provision of fairness and justice in the distribution of benefits and responsibilities between women and men (EIGE. https://eige.europa.eu/thesaurus/terms/1175).

**Gender equality definition** is the state in which access to rights or opportunities is unaffected by gender. It is not only women who are affected by gender inequality—all genders are impacted, including men, trans and gender-diverse people. This in turn impacts children and families, and people of all ages and backgrounds. Equality in gender does not mean that women and men will have or need the exact same resources, but that women's, men's, trans people's and gender-diverse people's rights, responsibilities and opportunities will not depend on their assigned gender at birth (H. Martinez. [2022]. What is Gender Equality ? Learn the definition with examples. https://unitedwaynca.org/blog/what-is-gender-equality/).

**Gender Equality Plan** – is a systematic and strategic instrument that establishes priorities and concrete objectives (based on a thorough status quo assessment), and the specific measures that will be implemented to improve gender equality within organisations and in the field of R&I (EIGE. https://eige.europa.eu/gender-mainstreaming/toolkits/gear/what-gender-equality-plan-gep).

**Gender Equality Plans** "cover a wide range of thematic areas, depending on contextual/institutional factors and assessment of need, such as recruitment, selection and career progression, work-life balance, leadership and decision-making, organisational culture, gender in research and education practice, and gender-related harassment and assault" (R. Rosa. [2022]. Gender Equality in Higher Education and Research. *Journal of Gender Studies* 31(1):1-7. https://doi.org/10.1080/09589236.2022.20074460/

**Gender Equality Plan** is defined as a set of actions aiming at:

1. conducting impact assessment / audits of procedures and practices to identify gender bias.

2. implementing innovative strategies to correct any bias.

3. setting targets and monitoring progress via indicators.

**A Gender Equality Plan is more than a commitment to gender equality**. It includes an analysis and bases its actions upon the findings of an assessment of gender (in)equality and gender bias within an organisation. Similarly, a Gender Equality Plan does not only consist of a series of objectives and targets, but also comprises of a set of practical measures, whose implementation should be monitored and evaluated. This set of actions, which can have different targets and degrees of complexity, is meant to address the contextual features of the organisations and to articulate a strategic view aimed at achieving gender equality (EIGE. https://eige.europa.eu/sites/default/files/gear_roadmap_01_shortguide.pdf).

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

GEP implementation – Part 1

## USEFUL TERMS AND DEFINITIONS 2/2:

**The process of developing and implementing a GEP:**

**Step 1:** getting started. In this step, you will need to familiarise yourself with the GEP concept and how it fits with your organisation and the specific context of your organisation. You also need to identify and approach potential allies and supporters of a GEP in your organisation.

**Step 2:** analysing and assessing the status quo in your organisation. In this step, sex-disaggregated data is collected and organisational procedures, processes and practices are critically reviewed to detect any gender inequalities and their causes.

**Step 3:** setting up a GEP. In this step, you will need to identify objectives, set your targets and measures to remedy the identified problems, allocate resources and responsibilities, and agree on timelines.

**Step 4:** implementing a GEP. In this step, you will implement the planned activities and undertake outreach efforts to gradually expand the network of stakeholders supporting the GEP implementation.

**Step 5:** monitoring progress and evaluating a GEP. Through monitoring and evaluation activities you will assess the implementation process and the progress achieved against the aims and objectives identified in your GEP. Findings from the monitoring and evaluation exercise(s) allow you to adjust and improve your interventions.

**Step 6:** what comes after a GEP? Based on the results of steps 4 and 5, you need to develop a new GEP that builds on your experiences, learnings and achievements and that also ensures the sustainability of the efforts started in previous GEP implementation rounds. (https://eige.europa.eu/)

**SMART rules** – SMART is an acronym that stands for Specific, Measurable, Achievable, Realistic and Timely. It helps to formulate goals adequate to the specific kind of organisation in concrete time. It also allows for monitoring the progress in achieving the assumed objectives thanks to a detailed goal description.

**Theory of change** for women and girls' empowerment can be used to examine the challenges and possibilities for working in HEI towards the five core outcome areas of: (H. Mott (2022). *Gender Equality in Higher Education: Maximising Impacts*. British Council Report. https://www.researchgate.net/publication/359175649_Gender_equality_in_higher_education_maximising_impacts. Accessed: 22.11.2022).

1. increased awareness and agency

2. fairer access to resources and opportunities

3. dialogue, collaboration and collective action

4. supporting legal and policy environment

5. changes in attitudes, beliefs, practices and discriminatory social norms

1-5. Collecting and analysing gender-related data at every stage of the project cycle

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

GEP implementation – Part 1

## PRACTICAL TIPS AND GUIDELINES

- The topic of GE is very broad, therefore it is worth setting a clear framework for the selected topics and equipping participants with supplementary materials, which will cover omitted issues

- The specificity of the GEP for each institution requires that main focus is on each organisation's individual context and national circumstances

- The mind map will be helpful in the process of indicating the units accountable to further GEP implementation

- RESET deliverables will be helpful in successful preparing GEPs, e.g., WP6: D6.5 "Joint statement of top-management on their engagement for equality, diversity and excellence in research", WP5: D5.4 "Toolbox for gender-neutral, diversity oriented institutional communication" and particular GEPs from RESET consortium members.

RESET | Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic

### 2.13 GEP implementation – orientation on skills competencies improvement
### Part 2

**Toolbox goal:**
- ☐ knowledge
- ☑ skills
- ☐ attitudes

**Participants:**
- Top and middle management
- Administrative staff

**Recommended form of training:**

Synchronous face-to-face training

**Duration of recommended form of training:**

7h with 1-hour lunch break

**Form of basic training:**

Synchronous online training

**Duration of basic training:**

4h

**Main objective:**

The main goal of the training is to improve skills and awareness about the GEP implementation process from the managerial perspective

**Learning results
Educational effects**

The participant:

- improves the ability to implement GEP efficiently
- applies the set of measures and indicators necessary for the GEP implementation and monitoring
- explains the importance of PDCA cycle in the process of the GEP implementation
- analyses the key areas of success in the GEP implementation in the specific university
- is aware of the importance of GEP communication and dissemination among different HEIs stakeholders

**Specific objectives:**

- learning about crucial steps in the GEP implementation
- becoming aware about the measures and indicators useful in GEP designing
- obtaining skills to use GEP elements in everyday practice
- discovering the necessity of regular and cyclical monitoring and evaluation of GEP
- knowing PDCA cycle for the GEP implementation
- identifying the key success factors in the GEP implementation process on the example of a chosen institution

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM RUB · SciencesPo

## LEARNING AREAS:

- How to make GEP a strategic tool for enhancing gender equality?
  - opportunities and risks
  - success stories of GEP implementation
  - from the GEP 1.0 to GEP 2.0 implementation
  - critical factors for achieving success
- The guiding principles for GEP implementation (form of co-creation)
  - stages for GEP implementation
  - the role of different stakeholders
  - the area of communication and dissemination (the ways of sensitising the academic community on key areas of GEP)
- Ways to measure the progress of GEP implementation in order to better evaluate this strategic document: metrics, data availability and responsibilities of bodies engaged in GEP implementation
  - the challenges of data management
  - best practices of data composition
  - the issue of KPIs setting
  - revision of the indicators from GEP 1.0 and further steps in preparing GEP 2.0
- PDCA – easy approach with great results
- The quality of GEP

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

GEP implementation – Part 2

## USEFUL REFERENCES:

Acker, J. (1989). The Problem with Patriarchy. *Sociology* 23(2): 235-240. https://doi.org/10.1177/0038038589023002005.

Acker, J. (1990). Hierarchies, Jobs, Bodies: A Theory of Gendered Organizations. *Gender & Society*, 4(2): 139-158. https://doi.org/10.1177/089124390004002002.

Clavero, S., Galligan Y. (2021). Delivering Gender Justice in Academia Through Gender Equality Plans? Normative and Practical Challenges. *Gender, Work & Organization* 28(3): 1115-1132. https://doi.org/10.1111/gwao.12658.

Husu, L. (2019). Gender Equality in Nordic Academia : Advances and Challenges. In: *Rodna ravnopravnost u visokom obrazovanju: Koncepti, prakse i izazovi*, edited by D. Vujadinović, Z. Antonijević. Novi Sad: University of Novi Sad (63-73).

Rosa, R. (2022). Gender Equality in Higher Education and Research. *Journal of Gender Studies* 31(1):1-7. https://doi.org/10.1080/09589236.2022.2007446).

Zabaniotou, A., Boukamel O., Tsirogianni A. (2021). Network Assessment: Design of a Framework and Indicators for Monitoring and Self-assessment of a Customized Gender Equality Plan in the Mediterranean Engineering Education Context. *Evaluation and Program Planning* Vol. 87: 101932. https://doi.org/10.1016/j.evalprogplan.2021.101932.

O'Brien, K. R., Holmgren M., Fitzsimmons T., Crane M.E., Maxwell P., Head B. (2019). What Is Gender Equality in Science? *Trends in Ecology & Evolution* 34(5): 395-399. https://doi.org/10.1016/j.tree.2019.02.009.

Peterson, H., Jordansson B. (2022). Gender Mainstreaming in Swedish Academia: Translating Policy into Practice. *Journal of Gender Studies* 31(1): 87-100. https://doi.org/10.1080/09589236.2021.2004539.

Internet sources:

Gender Equality Strategy. https://ec.europa.eu/info/policies/justice-and-fundamental-rights/gender-equality/gender-equality-strategy_en. Accessed: 30.08.2022.

Gender Equality Plan. https://eige.europa.eu/gender-mainstreaming/toolkits/gear/what-gender-equality-plan-gep. Accessed: 30.08.2022.

The Gender Equality Plan Eligibility Criterion in HE: Who is Concerned? How to Comply with It? https://www.youtube.com/watch?v=0gZyhhnStX4. Accessed: 30.08.2022.

Gender Equality Academy Webinars' Series: Introduction to Gender Equality Plans. https://www.youtube.com/watch?v=x6zgcHyDe5o. Accessed : 30.08.2022.

Horizon Europe Guidance on Gender Equality Plans. https://www.kpk.gov.pl/wp-content/uploads/2021/09/KI0221806ENN.en_.pdf. Accessed: 30.08.2022.

Martinez, H. (2022). What is Gender Equality ? Learn the definition with examples. https://unitedwaynca.org/blog/what-is-gender-equality/. Accessed : 22.11.2022.

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

The recommended form of training is a face-to-face meeting with all interactive elements and exercises allowing for self-reflection and an exchange of points of view and experiences. The one-day training is optimal for achieving all indicated goals.

- Lecture and discussion, e.g., four stages of PDCA will be introduced using the examples from different universities. Participants will also be given time to apply these phases to their own needs; discussing further steps in preparing GEP 2.0.
- Brainstorming about ways of sensitising the academic community on key areas of GEP
- Group work on practical tasks (sharing opinions about the GEP 1.0 implementation and reviewing the indicators from GEP 1.0), using the below structure: How is it? How should it be? What are the causes of the status quo? What are the solutions that can help to gain an ideal/better state and address the causes?
- Self-reflection
- Market of good practices concerning GEP implementation

**Form of basic training**

The basic training will be less interactive with more engagement of the trainer. The minimum number of hours to achieve the goals is 4. The exemplary methods of online training are:

- Lecture and discussion
- Brainstorm
- Self-reflection
- Market of good practices

## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- The trainer is expected to obtain information about participants in advance, in order to have enough time to read each GEP.
- GEPs from concrete institutions should be available during training, and participants are expected to have a good command of the document.
- There is also a need to collect good practices from different national tertiary institutions to compare different approaches, strategies and policies of GEPs' implementation.

## USEFUL TERMS AND DEFINITIONS 1/2:

**The PDCA (Plan-do-check-act) cycle** is a four-step model for carrying out change. Just as a circle has no end, the PDCA cycle should be repeated again and again for continuous improvement. The PDCA cycle is considered a project planning tool.

**Elements of the cycle:**

**Plan:** Recognize an opportunity and plan a change.

**Do:** Test the change. Carry out a small-scale study.

**Check:** Review the test, analyse the results, and identify what you've learned.

**Act:** Take action based on what you learned in the study step. If the change did not work, go through the cycle again with a different plan. If you were successful, incorporate what you learned from the test into wider changes. Use what you learned to plan new improvements, beginning the cycle again.

**Gender equality in R & I** consists of five main areas/essential factors: (European Commission [2021]. How to Prepare a Successful Proposal in Horizon Europe.

1. Work-life balance and organisational culture

2. Gender balance in leadership and decision-making

3. Gender equality in recruitment and career progression

4. Integrating a gender dimension into research and teaching content

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

**Mandatory GEP process requirements**: (Horizon Europe. https://ge-academy.eu/ge-uploads/2021/11/GEP-HorizonEU_GE-Academy-Final-Event_18-11-21_AP-1.pdf)

1. Public document

2. Dedicated resources

3. Data collecting and monitoring

4. Training and capacity building

**Framework for an effective and sustainable Gender Equality Plan:**

**Structure.** Your change process should focus on organisational policies and practices that govern, for instance, hiring, promotion and research assessment and provide evidence on how they may or may not contribute to gender inequalities in your organisation. In addition, ground your gender equality work in formal organisational structures and governance mechanisms.

**Personnel.** Each organisation has a specific sociodemographic structure. Make sure that you are familiar with this structure of the staff working in your organisation (or the students receiving training or the applicants applying for grants or stipends) and that your GEP takes this structure into account.

**Power**. Each organisation has a formal, but also an informal, structure of power and influence. As already described in step 1, mapping stakeholders in your organisation is important to identify those who are potential allies or possible gatekeepers. Keep the power relations within your organisation in mind when you are designing and implementing a GEP, and when you are engaging stakeholders.

**Culture**. Organisations also have a specific culture, which is more than just the working culture and climate; it is also evident in the values and messages communicated internally and externally, for instance how women and men are represented on an organisation's website and in other communication materials or how gender equality is valued in these communications.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

GEP implementation – Part 2

## USEFUL TERMS AND DEFINITIONS 2/2:

**R & I context.** What are the societal and polical contexts and the regional, national and international policies governing gender equality in R & I? What are the main features of the regional and national R & I system in which your organisation is embedded? How can you make use of these framework conditions to strengthen your GEP and to gain support for your objectives? (EIGE. https://eige.europa.eu/gender-mainstreaming/toolkits/gear/what-gender-equality-plan-gep).

**Gender equality in STEM**: "Reducing the gender gap in Science, Technology, Engineering and Mathematics (STEM) education areas could help reduce skills gap, increase employment and productivity of women and reduce occupational segregation. Ultimately this would foster economic growth via both higher productivity and increased labour market activity. However, despite good employment opportunities and highly productive jobs in this area, there is currently a low proportion of women studying and graduating in STEM subjects (EIGE. How Gender Equality in STEM Education Leads to Economic Growth (https://eige.europa.eu/gender-mainstreaming/policy-areas/economic-and-financial-affairs/economic-benefits-gender-equality/stem).

**Horizon Europe GE criteria**: (Gender in Horizon Europe. https://genderaction.eu/wp-content/uploads/2021/05/GE-in-HE_20210525.pdf.
1. Gender Equality Plan (eligibility criterion)
2. Intergration of gender dimension (award criterion)
3. Gender balance (ranking criterion)
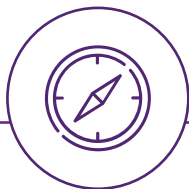
## PRACTICAL TIPS AND GUIDELINES

- The face-to-face training is  intended to be highly interactive with a huge involvement of participants. Trainers should be prepared to motivate, facilitate discussions and to support participants during the workshop.

- The topic of GEP Implementation 2 is of a very practical nature. It offers an opportunity for revision of the first version of GEP and gives clues and tips for planning the next edition of the document. It requires an atmosphere of openness, safeness and confidence.

- RESET deliverables will be helpful in successful preparing GEPs, e.g., WP6: D6.5 "Joint statement of top-management on their engagement for equality, diversity and excellence in research", WP5: D5.4 "Toolbox for gender-neutral, diversity oriented institutional communication" and particular GEPs from RESET consortium members.

RESET | Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

## Topic

### 2.14 Gender and diversity dimensions in research and teaching (including GIA and intersectionality) Part 1

**Toolbox goal:**
- ☑ knowledge
- ☐ skills
- ☐ attitudes

**Participants:**
- Top and middle management
- Academic staff
- Administrative staff (especially of research and science units)
- PhD students

**Recommended form of training:**
Synchronous online training

**Duration of recommended form of training:**
12h (3x4h)

**Form of basic training:**
Synchronous online training

**Duration of basic training:**
6h

**Main objective:**
Understanding the importance of GE and intersectionality in research and teaching

**Learning results Educational effects**

The participant:

- knows the importance of the gender dimension and GE in research and teaching
- understands intersectional approaches as applied to research
- is aware of the Gender Impact Assessment and its role in preparing research proposals
- knows the arguments in favour of applying the gender dimension in various research projects and initiatives, including STEM
- is able to successfully use the gender and diversity components in a course sylabus and programme

**Specific objectives:**

- learning about gender equality in research (e.g., in building teams, preparing project proposals, networking, cooperation with various stakeholders, etc.)
- understanding the idea of gender- and diversity-sensitive education
- learning about intersectionality methodologies and methods as applied in research
- learning about implementing GIA in research proposal
- understanding the need to apply the gender dimension in ALL research and teaching projects (including STEM)
- obtaining knowledge about gender mainstreaming in science and research
- familiarising with gender- and diversity-related obstacles, challenges, problems in science/research
- understanding the need to apply the gender dimension in course syllabi and curriculum of programmes at various levels (BA, MA, PhD), including STEM.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM RUB · SciencesPo

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 1

## LEARNING AREAS:

- Introducing the chosen areas of GE in science as well as gender and diversity dimensions in research and education

- HEIs policies as the focal point of to root and routinise the GE and intersectionality approach in the processes of management such as recruitment, promotion, etc.

- The importance of gender mainstreaming in all fields of science (including STEM) and of including the gender dimension in syllabi, curricula and study programmes at all levels of higher education

- Strategic dimensions of GE in research and education:
  - mapping the terrain
  - stakeholder groups involved in the process
  - discovering GE in education
  - possibilities and challenges for GE in education
  - priorities for GE in research

- Intersectionality
  - intersectionality as a concept, methodology and theory
  - beyond GE in research and education (taking into consideration multiple categories of exclusion and overlapping processes of discrimination)
  - benefits of applying the intersectional approach in research and teaching

- Gender Impact Assessment – tools

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 1



# USEFUL REFERENCES 1/2:

Aikman, S., Halai A., Rubagiza, J. (2011). Conceptualising Gender Equality in Research on Education Quality. *Comparative Education* 47(1): 45-60. http://www.jstor.org/stable/25800033.

Bencivenga, R., Siri A., Leone C., Taramasso A.C. (2021). Gender Equality Plans under Horizon Europe: from Difficulties of Interpretation to Prospects. *AG About Gender - International Journal of Gender Studies* vol. 10, no. 19: 378-397. https://doi.org/10.15167/2279-5057/AG2021.10.19.1316.

Bencivenga, R., Drew E. (2021). Promoting Gender Equality and Structural Change in Academia through Gender Equality Plans: Harmonising EU and National Initiatives. *GENDER - Zeitschrift für Geschlecht, Kultur und Gesellschaft*, no. 1: 27-42. https://doi.org/10.3224/gender.v13i1.03.

Christoffersen, A. (2017), Intersectional Approaches to Equality Research and Data. *Equality Challenge Unit*. https://www.advance-he.ac.uk/knowledge-hub/intersectional-approaches-equality-research-and-data. Accessed: 25.11.2022.

Heidari, S., Babor T.F., De Castro P. et al.(2016). Sex and Gender Equity in Research: Rationale for the SAGER Guidelines and Recommended Use. *Research Integrity and Peer Review* 1(2). https://doi.org/10.1186/s41073-016-0007-6.

McCall, L. (2005). The Complexity of Intersectionality. *Signs* vol. 30, no. 3: 1771-1800. https://doi.org/10.1086/426800.

Nichols, S., Stahl G. (2019). Intersectionality in Higher Education Research: a Systematic Literature Review. *Higher Education Research & Development* July: 2-14. https://doi.org.10.1080/07294360.2019.163834.

O'Brien, K.R. et al. (2019). What is Gender Equality in Science? *Trends in Ecology & Evolution* 34(5): 395-399. https://doi.org/10.1016/j.tree.2019.02.009.

O'Connor, P. (2018), Gender Imbalance in Senior Positions in Higher Education: What Is the Problem? What Can Be Done?. *Policy Reviews in Higher Education* 3(1): 28-50. https://doi.org/10.1080/23322969.2018.1552084.

O'Connor, P., Harford J., Fitzgerald T. (2020), Introduction: Mapping an Agenda for Gender Equality in the Academy. *Irish Educational Studies* vol. 39, no. 2: 131-137. https://doi.org/10.1080/03323315.2020.1754880.

Romero, M. (2017). *Introducing Intersectionality*. Cambridge: Polity Press.

Subrahmanian, R. (2005). Gender Equality in Education: Definitions and Measurements. *International Journal of Educational Development* 25: 395-407. https://doi.org/10.1016/j.ijedudev.2005.04.003.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 1

## USEFUL REFERENCES 2/2:

Internet sources:

EIGE. (2016). Roadmap to Gender Equality Plans in Research and Higher Education Institutions. Success factors and common obstacles. https://eige.europa.eu/sites/default/files/gear_roadmap_02_successfactors_obstacles_0.pdf. Accessed: 7.10.2022.

EIGE. (2016). Gender Impact Assessment: Gender Mainstreaming Toolkit. https://eige.europa.eu/publications/gender-impact-assessment-gender-mainstreaming-toolkit. Accessed: 7.10.2022.

EIGE. What Is Gender Mainstreaming?. https://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming. Accessed: 7.10.2022.

Forest, M. (2021). Introductory Training. Integrating the Sex and Gender Dimensions in Research. https://www.youtube.com/watch?v=TS-Do99-jfs. Accessed: 25.11.2022.

Gender Equality Academy. Gender in Research and Innovation. https://ge-academy.eu/gender-in-ri-tr/. Accessed: 7.10.2022.

GENDER-NET. IGAR TOOL - Recommendations for Integrating Gender Analysis into Research. http://igar-tool.gender-net.eu/en. Accessed: 7.10.2022.

GENDER-NET Plus. (2022). Policy Brief: Promoting Gender Equality in Research Funding. https://gender-net-plus.eu/wp-content/uploads/2022/02/Policy-Brief-Gender-Net-Plus-2022-02-01.pdf. Accessed: 7.10.22.

GENDER-NET Plus. (2021). Comparative Analytical Report on Existing National and Regional Initiatives on the Integration of the Gender Dimension in Research Content. https://gender-net-plus.eu/wp-content/uploads/2021/04/D6.2.-Comparative-analysis_report_MICINN_def.pdf. Accessed: 27.10.22.

GIA checklist and protocol in all project languages (2021). https://www.genderportal.eu/resources/gia-checklist-and-protocol-all-project-languages. Accessed: 20.12.2022

Mihajlović, Trbovc J. (ed.). (2016). Selection of Measures for Integrating Gender into Research and Curricula in Six European Countries. http://garciaproject.eu/wp-content/uploads/2016/12/GARCIA_D4.5-Selection-of-measures-for-integrating-gender-into-research-and-curricula.pdf. Accessed: 7.10.22.

Mihajlović Trbovc, J., Hofman A. (2015). Toolkit for Integrating Gender Sensitive Approach into Research and Teaching. https://eige.europa.eu/sites/default/files/garcia_toolkit_gender_research_teaching.pdf. Accessed: 7.10.2022.

SAGE. Systemic Action for Gender Equality. Guidelines for Sex/Gender into Scientific Research. https://www.khas.edu.tr/sites/khas.edu.tr/files/docs/2019-04/Gender_Sex_in_Research.pdf. Accessed: 7.10.2022.

UN Women. Intersectionality Resource Guide and Toolkit, An Intersectional Approach to Leave No One Behind. https://www.unwomen.org/sites/default/files/2022-01/Intersectionality-resource-guide-and-toolkit-en.pdf. Accessed: 7.10.2022.

Pollitzer, E., Palmén R. (2015). Gender in Research Content and Knowledge Production. http://www.genderportal.eu/sites/default/files/resource_pool/GenPORT_RS4_Knowledge_Production_28JAN2016_0.pdf. Accessed: 20.10.2022.

Yellow Window. (2009). Checklist for Gender in Research. https://www.yellowwindow.com/_files/ugd/17c073_22d7b327acc8434a91dbceba1898e7d2.pdf. Accessed: 7.10.22.

Yellow Window. (2009). Toolkit: Gender in EU-funded research. https://www.yellowwindow.com/_files/ugd/17c073_39e67c6a2c3e4e9183fd9d64892fcecd.pdf. Accessed: 7.10.22.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM RUB · SciencesPo

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 1

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

This form will allow the participants to work in groups and exchange their ideas as well reflections about the GE (as is state, their difficulties etc.).

- Lecture and discussion with participants concerning the importance of gender mainstreaming, the concept of intersectionality
- Individual work (self-reflection with a reflection sheet) + discussion in smaller configurations
- Group discussion - exchange of ideas and good practices
- Mind mapping - to draw the diagram of relations and goals for gender mainstreaming
- Case studies – to know the best practices from other EU projects and developed tools

**Form of basic training**

Due to its nature the training will have a form of a lecture with small pieces of interactive activities like online shared whiteboards, pools, case studies etc.

## TAILOR MADE TRAINING FOR EACH UNIVERSITY

- Need to prepare information regarding national policies about gender mainstreaming in research and education
- Need to analyse the existing documents at the organisational level
- Need to find good cases from the national context

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 1

## USEFUL TERMS AND DEFINITIONS 1/2:

**Intersectional approach** – "the interconnected nature of social categorisations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage. Intersectionality is the acknowledgement that everyone has their own unique experiences of discrimination and oppression and we must consider everything and anything that can marginalise people – gender, race, class, sexual orientation, physical ability, etc." (Intersectionality: What Is It and Why Is It Important?. https://www.womankind.org.uk/intersectionality-101-what-is-it-and-why-is-it-important/).

Originally coined by Kimberlé Crenshaw in 1989, **intersectionality** has gained popularity and is often discussed as a **theory, methodology, paradigm, lens or framework**. It recognises that people's lives are shaped by their identities, relationships and social factors. These combine to create intersecting forms of privilege and oppression depending on a person's context and existing power structures such as patriarchy, ableism, colonialism, imperialism, homophobia and racism (UN Women. Intersectionality Resource Guide and Toolkit. https://www.unwomen.org/sites/default/files/2022-01/Intersectionality-resource-guide-and-toolkit-en.pdf; Kimberlé Crenshaw. What Is Intersectionality. https://www.youtube.com/watch?v=ViDtnfQ9FHc).

**The concept of intersectionality** describes the ways in which systems of inequality based on gender, race, ethnicity, sexual orientation, gender identity, disability, class and other forms of discrimination "intersect" to create unique dynamics and effects. For example, when a Muslim woman wearing the Hijab is being discriminated against, it would be impossible to dissociate her female identity from her Muslim identity and to isolate the dimension(s) causing the discrimination. All forms of inequality are mutually reinforcing and must therefore be analysed and addressed simultaneously to prevent one form of inequality from reinforcing another. For example, tackling the gender pay gap alone – without including other dimensions such as race, socio-economic status and immigration status – will likely reinforce inequalities among women. (What Is Intersectionality?. https://www.intersectionaljustice.org/what-is-intersectionality).

**Gender sensitive research** demands that we consider gender at every stage of the process, where it is appropriate: (Guidelines for Sex/Gender into Scientific Research. https://www.khas.edu.tr/sites/khas.edu.tr/files/docs/2019-04/Gender_Sex_in_Research.pdf)

- In formulating the research questions
- In gathering the team, and organising the work
- In deciding upon the research methods used
- In data collection and analysis
- In the presentation/reporting of the findings

**Gender Impact Assessment** has been defined as an *ex ante* evaluation, analysis or assessment of a law, policy or programme that makes it possible to identify, in a preventative way, the likelihood of a given decision having negative consequences for the state of equality between women and men (https://eige.europa.eu/gender-mainstreaming/toolkits/gender-impact-assessment/what-gender-impact-assessment).

**Gender Impact Assessment** aims to determine the degree of sex and gender responsibility of a research proposal. GIA questions, analyses, sensitises and integrates sex and gender into research process where appropriate. In this way, GIA will not only contribute to the success of individual researchers' research projects, research teams' proposals, and organisations but also advance science and society at large. The sex and gender dimensions bring added value to research in terms of excellence, rigor, reproducibility, creativity and business opportunities. With such dimensions, the ultimate goal is to enhance the societal relevance of and push for responsible research and innovation (RRI) (RESET WP7 "GIA check list and protocol").

.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 1

## USEFUL TERMS AND DEFINITIONS 1/2:

**How to carry out Gender Impact Assessment:**

Step 1: Definition of the policy purpose

Step 2: Checking gender relevance

Step 3: Gender-sensitive analysis

Step 4: Weighing the gender impact

Step 5: Findings and proposals for improvement (https://eige.europa.eu/gender-mainstreaming/toolkits/gender-impact-assessment/what-gender-impact-assessment).

**Gender mainstreaming** – a strategy towards realising gender equality. It involves the integration of a gender perspective into the preparation, design, implementation, monitoring and evaluation of policies, regulatory measures and spending programmes, with a view to promoting equality between women and men, and combating discrimination. Gender mainstreaming is not a policy goal in itself, but a means to achieve gender equality. Equality between women and men is recognised by the EU as a fundamental right, a common value of the EU, and a necessary condition for the achievement of the EU objectives of growth, employment and social cohesion (What Is Gender Mainstreaming ?. https://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming).

.

## PRACTICAL TIPS AND GUIDELINES

- Trainers are supposed to prepare the online tools for the group work before the training. It is very important to assure proper access to used tools and to avoid the risk of personal data abuses and disclosure risk.

- The basic form of training should not be overloaded with the amount of information.

- National and university contexts, case studies and examples of good practices will be very beneficial.

- RESET solutions and reports should be used in planning the training ("Gender Impact Assessment (GIA) guidelines" and "GIA checklist and protocol in all project languages").

## Topic

### 2.15  Gender and diversity dimensions in research and teaching (including GIA and intersectionality) Part 2

**Toolbox goal:**
- ☐ knowledge
- ☑ skills
- ☑ attitudes

**Participants:**
- Top and middle management
- Academic staff
- Administrative staff (especially of research and science units)

**Recommended form of training:**
Synchronous face-to-face training

**Duration of recommended form of training:**
7h with 1-hour lunch break

**Form of basic training:**
Synchronous online training

**Duration of basic training:**
7h with 1-hour lunch break

**Main objective:**
To apply GE in research and education approach in the workplace

**Learning results Educational effects**

The participant:

- is able to plan the process of gender mainstreaming
- creates innovative solutions of GE in research and education
- analyses the best options and indicates those most suitable for the University
- is able to plan and apply GIA measures
- knows how to use and apply intersectional approach in research
- is able to link scientific excellence with gender/diversity
- designs course syllabus with the gender/diversity component
- is able to search for references/publications with the gender/diversity dimensions in his/her/their field of study

**Specific objectives:**

- learning about gender equality in research (e.g., in building teams, preparing project proposals, networking, cooperation with various stakeholders, etc.),
- learning about intersectionality methodologies and methods as applied in research,
- learning about implementing GIA in research proposals,
- understanding the need of applying the gender dimension in ALL research and teaching projects (including STEM),
- familiarising with gender- and diversity-related obstacles, challenges, problems in science/research,
- understanding the need of applying the gender dimension in course syllabi and curriculum of programmes at various levels (BA, MA, PhD), including STEM.
- discovering a problem-solving approach for gender mainstreaming issues
- learning about improving attitudes of continuous improvement
- applying the approach in work place

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM RUB · SciencesPo

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 2

## LEARNING AREAS:

- Introducing the idea of gender mainstreaming
- How to implement the gender mainstreaming approach in practice
- The idea of Design Thinking
- The stakeholders of the process
  - who is responsible for implementing the idea of GE?
  - what are their attitudes to the topic?
  - what should they know about gender mainstreaming?
- The process of gender mainstreaming at the HEIs – workshop

## USEFUL REFERENCES 1/3:

Aikman, S., Halai A., Rubagiza, J. (2011). Conceptualising Gender Equality in Research on Education Quality. *Comparative Education* 47(1): 45-60. http://www.jstor.org/stable/25800033.

Bencivenga, R., Siri A., Leone C., Taramasso A.C. (2021). Gender Equality Plans under Horizon Europe: from Difficulties of Interpretation to Prospects. *AG About Gender - International Journal of Gender Studies* vol. 10, no. 19: 378-397. https://doi/org/10.15167/2279-5057/AG2021.10.19.1316.

Bencivenga, R., Drew E. (2021). Promoting Gender Equality and Structural Change in Academia through Gender Equality Plans: Harmonising EU and National Initiatives. *GENDER - Zeitschrift für Geschlecht, Kultur und Gesellschaft*, no. 1: 27-42. https://doi.org/10.3224/gender.v13i1.03.

Christoffersen, A. (2017), Intersectional Approaches to Equality Research and Data. *Equality Challenge Unit*. https://www.advance-he.ac.uk/knowledge-hub/intersectional-approaches-equality-research-and-data. Accessed: 25.11.2022.

Dorst, K. (2011). The Core of "Design Thinking" and Its Application. *Design Studies* 32: 521-532. https://doi.org/10.1016/j.destud.2011.07.006.

Foster, M.K. (2021). Design Thinking: A Creative Approach to Problem Solving. *Management Teaching Review* 6(2): 123-140. https://doi.org/10.1177/2379298119871468.

Heidari, S., Babor T.F., De Castro P. et al.(2016). Sex and Gender Equity in Research: Rationale for the SAGER Guidelines and Recommended Use. *Research Integrity and Peer Review* 1(2). https://doi.org/10.1186/s41073-016-0007-6.

Lahiri, A., Cormican K., Sampaio S. (2021). Design thinking: From Products to Projects. *Procedia Computer Science* vol. 81: 141-148. https://doi.org/10.1016/j.procs.2021.01.114.

McCall, L. (2005). The Complexity of Intersectionality. *Signs* vol. 30, no. 3: 1771-1800. https://doi.org/10.1086/426800.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 2

## USEFUL REFERENCES 2/3:

Nichols, S., Stahl G. (2019). Intersectionality in Higher Education Research: a Systematic Literature Review. *Higher Education Research & Development* July: 2-14. https://doi.org.10.1080/07294360.2019.163834.

O'Brien, K.R. et al. (2019). What is Gender Equality in Science? *Trends in Ecology & Evolution* 34(5): 395-399. https://doi.org/10.1016/j.tree.2019.02.009.

O'Connor, P. (2018), Gender Imbalance in Senior Positions in Higher Education: What Is the Problem? What Can Be Done?. *Policy Reviews in Higher Education* 3(1): 28-50. https://doi.org/10.1080/23322969.2018.1552084.

O'Connor, P., Harford, J., Fitzgerald T. (2020), Introduction: Mapping an Agenda for Gender Equality in the Academy. *Irish Educational Studies* vol. 39, no. 2: 131-137. https://doi.org/10.1080/03323315.2020.1754880.

Romero, M. (2017). *Introducing Intersectionality*. Cambridge: Polity Press.

Subrahmanian, R. (2005). Gender Equality in Education: Definitions and Measurements. *International Journal of Educational Development* 25: 395-407. https://doi.org/10.1016/j.ijedudev.2005.04.003.


Internet sources:

An Introduction to Design Thinking. Process Guide. https://web.stanford.edu/~mshanks/MichaelShanks/files/509554.pdf. Accessed: 25.11.2022.

Design Thinking Process. https://www.youtube.com/watch?v=jT95e2ycu9I. Accessed: 27.10.2022.

Design Thinking in Education. https://tll.gse.harvard.edu/design-thinking. Accessed: 27.10.2022.

EIGE. (2016). Gender Impact Assessment: Gender Mainstreaming Toolkit. https://eige.europa.eu/publications/gender-impact-assessment-gender-mainstreaming-toolkit. Accessed: 7.10.2022.

Forest, M. (2021). Introductory Training. Integrating the Sex and Gender Dimensions in Research. https://www.youtube.com/watch?v=TS-Do99-jfs. Accessed: 25.11.2022.

Gender Equality Academy. Gender in Research and Innovation. https://ge-academy.eu/gender-in-ri-tr/. Accessed: 7.10.2022.

Gender Equality Academy. Checklist for Gender in Research. https://ge-academy.eu/ge-uploads/2022/11/Handout-2_EO-Gender-research-content-cycle.pdf. Accessed: 25.11.2022.

Gender Equality Academy. Promoting Gender Equality Through Institutional Change Handout about the EU legal and Policy Framework. https://ge-academy.eu/ge-uploads/2022/11/Handout-1_EU-legal-and-Policy-framework.pdf. Accessed: 25.11.2022.

GENDER-NET. IGAR TOOL - Recommendations for Integrating Gender Analysis into Research. http://igar-tool.gender-net.eu/en. Accessed: 7.10.2022.

GENDER-NET Plus. (2022). Policy Brief: Promoting Gender Equality in Research Funding. https://gender-net-plus.eu/wp-content/uploads/2022/02/Policy-Brief-Gender-Net-Plus-2022-02-01.pdf. Accessed: 7.10.22

#RESET Your Research Project with Gender (2022). https://www.youtube.com/watch?v=NUyVDkZ3F5E. Accessed: 20.12.2022.

RESET — Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 2

## USEFUL REFERENCES 3/3:

GENDER-NET Plus. (2021). Comparative Analytical Report on Existing National and Regional Initiatives on the Integration of the Gender Dimension in Research Content. https://gender-net-plus.eu/wp-content/uploads/2021/04/D6.2.-Comparative-analysis_report_MICINN_def.pdf. Accessed: 27.10.22.

Mihajlović, Trbovc J. (ed.). (2016). Selection of Measures for Integrating Gender into Research and Curricula in six European Countries. http://garciaproject.eu/wp-content/uploads/2016/12/GARCIA_D4.5-Selection-of-measures-for-integrating-gender-into-research-and-curricula.pdf. Accessed: 7.10.22.

Mihajlović Trbovc, J., Hofman A. (2015). Toolkit for Integrating Gender Sensitive Approach into Research and Teaching. https://eige.europa.eu/sites/default/files/garcia_toolkit_gender_research_teaching.pdf. Accessed: 7.10.2022.

Pollitzer, E., Palmén R. (2015). Gender in Research Content and Knowledge Production. http://www.genderportal.eu/sites/default/files/resource_pool/GenPORT_RS4_Knowledge_Production_28JAN2016_0.pdf. Accessed: 20.10.2022.

SAGE. Systemic Action for Gender Equality. Guidelines for Sex/Gender into Scientific Research. https://www.khas.edu.tr/sites/khas.edu.tr/files/docs/2019-04/Gender_Sex_in_Research.pdf. Accessed: 7.10.2022.

UN Women. Intersectionality Resource Guide and Toolkit, An Intersectional Approach to Leave No One Behind. https://www.unwomen.org/sites/default/files/2022-01/Intersectionality-resource-guide-and-toolkit-en.pdf. Accessed: 7.10.2022.

Yellow Window. (2009). Checklist for Gender in Research. https://www.yellowwindow.com/_files/ugd/17c073_22d7b327acc8434a91dbceba1898e7d2.pdf. Accessed: 7.10.22.

Yellow Window. (2009). Toolkit: Gender in EU-funded Research. https://www.yellowwindow.com/_files/ugd/17c073_39e67c6a2c3e4e9183fd9d64892fcecd.pdf. Accessed: 7.10.22.

université BORDEAUX · ARISTOTLE UNIVERSITY OF THESSALONIKI · U.PORTO · UNIVERSITY OF LODZ · UNIVERSITY OF OULU · RUHR UNIVERSITÄT BOCHUM · RUB · SciencesPo

RESET · Redesigning Equality and Scientific Excellence Together

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 2

## METHODS AND TRAINING ACTIVITIES:

Both in recommended and basic forms of training, several methods will be used. Depending on the form, below you can find some essential suggestions.

**Recommended form of training**

- The workshop will be run using the Design Thinking method. Participants will focus on the key areas of gender mainstreaming and will follow the DT steps.

  Stage 1: Empathise

  Stage 2: Define

  Stage 3: Ideate

  Stage 4: Prototype

  Stage 5: Test the solutions

- The main goal is to gain the deepest understanding of the users/beneficiaries and what their ideal solution will be.

- The main creators of the training are participants who decide about the main issues, personas that will be analysed and solutions that are going to be generated.

- In the first step participants will collect data about the specific group of beneficiaries such as administrative staff, academic staff etc. and formulate the set of assumptions to verify.

- The value of empathy is a focal point of this stage to understand the situation of users and to have input for further processes.

- In the next level participants will analyse gathered information, observations and synthesise them to define the core problems that was identified. This is the time to create personas which will be the representatives of the analysed community.

- Ideation allow to generate innovative and diversified ideas that could be developed. When ideas are proposed, participants are expected to develop the chosen solutions.

- Thanks to the work on real needs, the improved ideas are more coherent with participants' expectations. The last element of the process is testing, in which designed ideas are proposed to the whole group and evaluated to eliminate some weak points and suggest improvements.

**Form of basic training**

The online training will require more effort from the trainers who need to prepare templates for online tasks.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 2

## TAILOR MADE TRAINING
## FOR EACH UNIVERSITY

- Need to collect data about academic stakeholders and their attitudes to gender mainstreaming to be able to create the profiles of users.
- Need to analyse the existing documents at the organisational level.
- Need to refer to RESET documents, deliverables and achievements (on GIA and scientific excellence).

## USEFUL TERMS AND DEFINITIONS 1/3:

**Intersectional approach** – "the interconnected nature of social categorisations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage. Intersectionality is the acknowledgement that everyone has their own unique experiences of discrimination and oppression and we must consider everything and anything that can marginalise people – gender, race, class, sexual orientation, physical ability, etc." (Intersectionality: What Is It and Why Is It Important?. https://www.womankind.org.uk/intersectionality-101-what-is-it-and-why-is-it-important/).

Checking **intersectional sensitivity**:

- Reflect upon your privilege,
- Listen and learn the views of other people and vulnerable groups,
- Make space for vulnerable groups' voices, stories and actions,
- Watch your language.

(Intersectionality: What Is It and Why Is It Important?. https://www.womankind.org.uk/intersectionality-101-what-is-it-and-why-is-it-important/).

**The concept of intersectionality** describes the ways in which systems of inequality based on gender, race, ethnicity, sexual orientation, gender identity, disability, class and other forms of discrimination "intersect" to create unique dynamics and effects. For example, when a Muslim woman wearing the Hijab is being discriminated, it would be impossible to dissociate her female from her Muslim identity and to isolate the dimension(s) causing her discrimination. All forms of inequality are mutually reinforcing and must therefore be analysed and addressed simultaneously to prevent one form of inequality from reinforcing another. For example, tackling the gender pay gap alone – without including other dimensions such as race, socio-economic status and immigration status – will likely reinforce inequalities among women. (What Is Intersectionality?. https://www.intersectionaljustice.org/what-is-intersectionality).

**Intersectionality is**: (Larson et al. 2016)

- Mutually constituted and intersecting social categories.
- Inequalities as dynamic relationships.
- Understanding that power configurations are time- and location-dependent.
- Structural and political factors that shape inequalities.
- An exploration on how social inequalities are shaped by power relations.
- Focus on the implications for those most marginalised within a group.
- Practitioners' reflection on how their own background identities shape the research process and interpretation of the results.

## USEFUL TERMS AND DEFINITIONS 2/3:

**Gender sensitive research** demands that we consider gender at every stage of the process, where it is appropriate: (Guidelines for Sex/Gender into Scientific Research. https://www.khas.edu.tr/sites/khas.edu.tr/files/docs/2019-04/Gender_Sex_in_Research.pdf)

- In formulating the research questions
- In gathering the team, and organising the work
- In deciding upon the research methods used
- In data collection and analysis
- In the presentation/reporting of the findings

**Gender Impact Assessment** aims to determine the degree of sex and gender responsibility of a research proposal. GIA questions, analyses, sensitises and integrates sex and gender into research process where appropriate. In this way, GIA will not only contribute to the success of individual researchers' research projects, research teams' proposals, and organisations but also advance science and society at large. The sex and gender dimensions bring added value to research in terms of excellence, rigor, reproducibility, creativity and business opportunities. With such dimensions, the ultimate goal is to enhance the societal relevance of and push for responsible research and innovation (RRI) (RESET WP7 "GIA check list and protocol"). There are three dimensions of the RESET GIA checklist that can be used:

1. Excellence – planning phase of the research
2. Implementation – execution phase of the research
3. Impact – dissemination phase of the research

**How to carry out Gender Impact Assessment:**

Step 1: Definition of the policy purpose

Step 2: Checking gender relevance

Step 3: Gender-sensitive analysis

Step 4: Weighing the gender impact

Step 5: Findings and proposals for improvement (https://eige.europa.eu/gender-mainstreaming/toolkits/gender-impact-assessment/what-gender-impact-assessment).

**Gender mainstreaming** – a strategy towards realising gender equality. It involves the integration of a gender perspective into the preparation, design, implementation, monitoring and evaluation of policies, regulatory measures and spending programmes, with a view to promoting equality between women and men, and combating discrimination. Gender mainstreaming is not a policy goal in itself, but a means to achieve gender equality. Equality between women and men is recognised by the EU as a fundamental right, a common value of the EU, and a necessary condition for the achievement of the EU objectives of growth, employment and social cohesion (What Is Gender Mainstreaming ?. https://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming).

**Gender mainstreaming cycle**: What Is Gender Mainstreaming?. https://eige.europa.eu/gender-mainstreaming/what-is-gender-mainstreaming)

- Define tools (Gender statistics, gender analysis, GIA, gender stakeholder consultation)
- Plan tools (gender budgeting, gender procurement, gender indicators)
- Act tools (gender equality training, gender-sensitive instytutional transformation, gender awareness-raising)
- Check tools (gender monitoring, gender evaluation)

## USEFUL TERMS AND DEFINITIONS 3/3:

**The ways to incorporate the sex/gender dimension in research**:

- Gender equality in research teams,
- Gender-sensitive research – gender is considered at every stage of the research project,
- Gender-specific research – gender is the field of study itself.

**Gender-sensitive research** demands that we consider gender at every stage of the process, where it is appropriate:

- In formulating the question,
- In gathering the team, and organising the work,
- In deciding upon the research methods used,
- In data collection and analysis,
- In the presentation/reporting of the findings.

(Guidelines for Sex/Gender into Scientific Research.
https://www.khas.edu.tr/sites/khas.edu.tr/files/docs/2019-04/Gender_Sex_in_Research.pdf)

Research processes that need to **include gender/sex dimensions**:

- Research design (context factors, defining priorities, theoretical framework, research questions).
- Data collection (choosing the right methodology, incorporating gender into analysis, analysing interactions and intersections.
- Reporting and disseminating research results.

**Design thinking** is a human-cantered approach helpful in the problem solving. It eases to discover the needs and expectations of users and to plan the proper actions based on the generated ideas. It's a method oriented on an active participation and solution based framework.

**Design thinking** is a mindset and approach to learning, collaboration and problem solving. Traditional academic teaching is typically analytical and focused. Design Thinking encourages learners to take an inquiry stance, think divergently, and develop reflexivity. The approach affirms empathy, curiosity, constructiveness, and continuous iteration (Design Thinking in Education. https://tll.gse.harvard.edu/files/hgsetll/files/designthinkingeducation.pdf). DT is:

- an approach
- a process
- active
- versatile

**Scientific excellence from the gender perspective** provides a novel understanding of and approach to progressive change of the criteria of excellence in research. They include: "recognition, multidisciplinarity, open access, intersectionality, responsible research and innovation as well as societal impact". In "Joint statement of top-management on their engagement for equality, diversity and excellence in research", the RESET consortium declared that all academic stakeholders ought to "participate in the competition for excellence, regardless of their social characteristics", which is rooted in "the principles of gender equality and diversity, according to which all individuals should have the same opportunities, regardless of their sex, gender, sexual orientation, nationality and ethnicity, the fact of having disability, their religion, social background or even culture" (WP5, D6.5).

.

D4.2: Comprehensive gender equality/gender mainstreaming training toolbox useful for different trainee groups or national contexts

Gender and diversity dimensions in research and teaching – Part 2

## PRACTICAL TIPS AND GUIDELINES

- Trainers should prepare the online tools for the group work before the training.

- The university's contexts, case studies and examples of good practices will be very beneficial.

- For the intersectionality practical discussion, use the Intersectionality Wheel (Larson et al. 2016).

- RESET solutions and reports should be used in planning the training ("Gender Impact Assessment (GIA) guidelines" and "GIA checklist and protocol in all project languages" as well as "Joint statement of top-management on their engagement for equality, diversity and excellence in research").

# Conclusions

The toolbox has been developed as part of the RESET project under the task 4.2 "Developing a comprehensive programme and teaching templates/guidelines/workshop syllabi adaptable for different trainee groups and diverse social-cultural and national contexts". It is an element of broader activities related to the implementation of a training system addressed to the academic communities in GEP-implementing partner universities. The toolbox has been co-designed with all RESET partners and it allows for the conducting of educational activities addressed to various target groups - not only in the RESET consortium but also in other HEIs interested in using it for their training purposes. Therefore, it has been designed in a very universal and flexible way in order to accommodate the needs of diversified academic stakeholders. However, for HEIs outside of the RESET consortium, it is strongly recommended to first analyse the internal needs of their university's communities in order to discover those areas related to GE and diversity that require specific educational interventions. Careful investigation of specific training demands provides an opportunity to create a tailor-made learning scheme and foresee the possible educational outcomes that are crucial in achieving institutional change with regard to gender equality and diversity.

The toolbox has been prepared using the set of recommendations proposed in D4.1 "Report on specific training needs of each partner university and the presentation on the existing training programmes/courses/workshops" submitted in 2021. These suggestions included, among others: planning both online and face-to-face training activities, planning short (4 to 8 hours) training, preparing tailor-made training adjusted to the national and institutional contexts of particular universities, drawing from experiences of mentoring universities in the RESET consortium (OULU and RUB), using interactive methods of training, addressing intersectionality in relation to gender and using the co-design approach to planned training activities. To these recommendations that will be addressed in D4.3 we would add the focus on including student perspectives and the gender/diversity dimensions in teaching programmes and course syllabi.

The toolbox contains eight carefully planned modules that are helpful in the conceptualisation of the training process, which in all European and many non-European HEIs is an essential part of implementing Gender Equality Plans (GEPs) and improving the institutional culture of equality and diversity.

Conducting regular educational activities in the area of gender equality and diversity provides the academic community with many benefits, including:

- minimising the risk of improper behaviour
- building an integrated and friendly work environment
- raising awareness of equality and diversity issues
- supporting marginalised groups and those at risk of discrimination
- creating a gender-sensitive culture
- incorporating equality- and diversity-related issues in educational, research and administrative processes
- strengthening management mechanisms and procedures
- enhancing institutional and structural change.

The toolbox's designers propose a set of educational methods, learning areas, tools and topics that respond to training needs regarding the newest requirements for mainstreaming equality and diversity by the United Nations, European Union and other renowned international organisations.

The toolbox offers trainers interested in conducting educational activities in their institutions the possibility of using ready-made solutions and good practises as well as knowledge derived from RESET and other EU-funded projects, and of adapting them to their needs by supplementing the proposed modules with their own national/regional/institutional content and tailor-made exercises.

One of the essential elements of the toolbox is a set of references, which — in line with the train-the-trainers methodology – offer instructors responsible for training activities on gender equality and diversity an opportunity to familiarise themselves with topics, key areas and useful terms included in particular modules. Both theoretical and practical publications are added to the literature review. The reference section also contains results, reports and guidelines worked out by other EU-funded projects on similar topics. Therefore, the toolbox achieves synergy at the level of knowledge and quality of the prepared material. In addition, there is a section with suggestions and tips for a flexible and tailored adaptation of the toolbox by various HEIs, which encourages the addressing of different cultural conditions and the specific needs of specific institutions. The toolbox is organised in a way that allows the subject and the form of training to be freely chosen, taking into consideration the requirements and availability of particular target groups.

The toolbox provides a framework for training activities for RESET partner universities. The next task of WP4, "Creating teaching material and providing examples of different training methods suitable for gender mainstreaming and equality courses" (4.3), will introduce the detailed content for each module (scenarios, exercises, handouts and other materials to be used during training) and will practically show how to apply the gender/diversity components in teaching practises. D4.2 (toolbox) together with 4.3 (content) will pave the way for pilot train-the-trainers sessions which will be conducted in 2023 and 2024.