Gender Equality
GE ACADEMY

D3.3

Quality standards Booklet

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5.0	20/12/2021	Final version for coordinators' review	K&I

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INTRODUCTION

This set of quality standards was developed in the framework of the Gender Equality (GE) Academy project. The project was funded by the European Commission to design and implement a broad capacity building programme to support institutional transformation processes aimed at increasing gender equality and inclusiveness in research organisations[1].

Capacity-building for gender equality is a key component of any successful institutional change programme and has been recently included as one of the building blocks that Gender Equality Plans must include under the eligibility criterion for funding of the European Commission's Horizon Europe framework programme. The building block is defined that the GEP implementation must be supported by training and capacity-building[2].

Defining quality principles and criteria for training and capacity building activities within institutional change programmes is therefore urgent and increasingly relevant. This booklet is intended to contribute to this aim.

The standards included in this booklet were used within the GE Academy to guarantee consistently high levels of quality of its sessions and were revised and integrated after the implementation of the programme, based on the experience gained.

This final Booklet, addressing higher education institutions and research organisations, aims at providing practical support and examples for the implementation of training initiatives and programmes on gender equality and inclusiveness of different scope, dealing with a variety of relevant topics and using different training formats.

Before presenting the standards, some basic information about the standard-setting process, the structure of the booklet and its possible use and limitations (in the form of caveats), are briefly provided.

The standard-setting process

This booklet is a result of a long and elaborated standard-setting process, synthesised below, which included different activities aimed at identifying and defining three sets:

−   **Gender training principles**, as a guide and an inspiration to get to define standards
−   **Quality standards** for the design, preparation, implementation and evaluation of training sessions
−   Quality criteria defining an ideal **gender trainer profile**.

GENDER TRAINING PRINCIPLES

The principles used to identify and classify the standards have been drawn from feminist pedagogy frameworks, grounded in the broader field of critical theories of learning and teaching. Not all principles are exclusive to feminist perspectives, even if they are all strongly connected to feminist theory and practice. Taken together, they represent an effective set of tools to support broadly inclusive and democratic education, also suitable for intersectional/gender+ frameworks (see below). The principles have been selected and synthesised here following and adapting the

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[1] The work on the standards was part of Work-Package 3: "Quality standards".
[2] https://ec.europa.eu/info/research-and-innovation/strategy/strategy-2020-2024/democracy-and-rights/gender-equality-research-and-innovation_en#gender-equality-plans-as-an-eligibility-criterion-in-horizon-europe.

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PERFCKTSI model proposed by Yellow Window in the framework of the institutional change project SUPERA[3]. They are defined here as relevant to their application in training contexts.

Although the principles are interconnected, a choice was made to present them separately in order to highlight the different facets of their meanings and aims.

A few standards refer not only or mainly to the model, but also more general principles for effective training. However, they have been selected considering their relevance to and compatibility with the PERFCKTSI principles.

GENDER TRAINING STANDARDS

The identification of the standards is the result of a series of activities briefly summarised here.

Firstly (in 2019), a wide **review of existing sets of quality standards for gender training** was conducted. The review allowed to single out 28 relevant sources (included in the bibliography) produced by European and international institutions, projects and individual scholars and experts. On this basis, a **database of 179 standards** was developed.

Each standard was categorised based on a set of criteria, adapted to the characteristics of the training to be provided within the GE Academy, i.e.:

- **The relevant phase of the training process** (design; planning and preparation; implementation; evaluation)
- **The area of application** (methods; materials, conditions; contents)
- **The training format** (in-person trainings; summer schools; in-person interactive workshops; webinars; DOCCs/Distributed Open Collaborative Courses)
- **The level of the standard** (minimum or advanced).

After several rounds of revision and discussion with partners and external experts[4], the standards in the database were selected, grouped and reworded and their number was progressively reduced, getting to 78 first, and then to 40 overall[5]. These were included in the **first Booklet**, presented by training phase. This is the set that was tested within the GE Academy programme.

The process leading to this **second and final version of the Booklet** started in September 2021, when the roll-out phase of the GE Academy project was nearly concluded. Two internal workshops have been organised involving the consortium members who were most involved with the delivery of training sessions. The first workshop was geared to discuss the general structure of the Booklet and to review each standard based on the experience matured during the implementation of the training activities conducted under the GE Academy project. The orientations emerging from the first workshop led to the development of a new draft version of the Booklet. The second workshop

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[3] https://www.superaproject.eu

[4] Special thanks go to Lucy Ferguson (The Graduate Institute of International and Development Studies, Geneva), Maxime Forest (Yellow Window, Paris), Anke Lipinsky (GESIS, Cologne), Jörg Müller (Universitat Oberta de Catalunya, Barcelona), Lorena Pajares (Universidad Complutense de Madrid, Madrid), Brigitte Ratzer (Technische Universität Wien, Wien), Franz Wong (Stanford University), and Angela Wroblewski (Institute für Höhere Studien, Wien).

[5] The standard-setting process has been led by K&I team led by Marina Cacace, including Luciano d'Andrea and Federico Marta. Among the GE Academy partners, a decisive contribution has been provided by Lut Mergaert, Nathalie Wuiame, Jana Dvorackova, Maria Sangiuliano, Trine Rogg Korsvik, Linda Rustad and Bente Knoll. Interviews have been conducted on specific aspects with Inés Sanchez de Madariaga, Marina Angelaki and Franz Wong.

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was devoted to discussing and reviewing this draft and populating the set with examples from the GE Academy experience. After that, the internally revised version of the Booklet was sent to two international experts[6], members of the Advisory Board of the project for their review, to then proceed to its finalised version. **Standards are now 38** and they are still presented by training phase (14 pertaining to the Design phase, 7 to the Planning and preparation phase, 8 to the Implementation phase, and 9 to the Evaluation phase).

The final version of the booklet was drafted by Marina Cacace, Luciano d'Andrea and Federico Marta (K&I), in cooperation with GE Academy partners[7].

GENDER TRAINER PROFILE

A slightly different approach was used for identifying the criteria defining the desired **profile of the gender trainer**. In this case, too, the starting point was a review of existing gender trainer profiles. This led to identifying 7 profiles, from as many different sources.

Based on partner consultation, criteria deriving from 2 profiles were selected and integrated, and a first version, including 15 criteria, was thus developed. A second version was subsequently drafted after partner revision, including 19 criteria (three additional criteria were formulated based on suggestions from the partners).

After the roll-out of the GE Academy programme, the criteria were worked on again during the above-mentioned internal workshops. As a result, we now have **14 criteria**, sorted into 3 groups: basic expertise; methodological skills; personal and social competence.

The structure of the booklet

The booklet includes:

− The list and synthetic description of the gender training **principles** which have guided the selection and definition of the standards to be included in the Booklet
− The list of the gender training **standards**, classified by principle and enriched by practically-oriented annotations
− The list of the quality criteria identifying an ideal **trainer profile**
− The **sources** which have been used.

A few caveats

Some specifications need to be made about the nature and use of principles and standards for gender training, also to dispel potential misunderstandings.

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[6] Thanks again to Franz Wong and Kalypso Sepou for their review.

[7] Special thanks for their contribution are in particular due to Lut Mergaert, Nathalie Wuiame, Maxime Forest, Vasia Madesi (YW), Maria Sangiuliano, Natasha Sega (SV), Bente Knoll, Agnes Renkin (B-NK), Marcela Linkova, Jana Dvorackova, Katarina Slezakova (ISAS); Sara Clavero (TUD); Dorottya Redai (CEU); Vasiliki Moumtzi, Kyriaki Karydou (VILABS).

PERFCKTSI PRINCIPLES AND TRAINING TOPICS

The feminist principles informing training standards (such as e.g., intersectionality or standpoint awareness) do not represent a recommended topic of the trainings. They are instead theoretical tools that "gender-fluent" trainers (or rather, trainers fluent in gender+[8]) apply to practically support participants' awareness and learning, fostering a deeper connection with their personal and professional experience, practice and knowledge. Principles can however be directly reflected in training content when it comes to specialist training, as in the case of Train the Trainer sessions.

WHO ARE THESE STANDARDS ADDRESSING?

Standards in the set are generally phrased as outcome standards[9], identifying an expected situation to be reached (e.g., the application of participatory methods in training delivery, or the selection of an appropriate room or time to hold the training). Outcome standards do not address different actors within an organisation specifying their respective roles, as process standards do (as well as different tools like recommendations), and it is not their duty to indicate how to reach the expected outcome, or who should be in charge[10]. Indeed, outcome standards are to be applied in different institutional configurations and organisational settings, which are each time expected to establish their own internal rules and responsibility structures. This is particularly relevant for standards in an area like gender training, which is very diversified in many respects, making it inappropriate to describe standardised processes, for instance as concerns the respective roles of trainers, promoting and hosting organisations, or even funders (as in the case of EU-funded projects).

STANDARDS AND EVALUATION

While compliance with standards is an important part of training evaluation, the two aspects do not coincide. On the one hand, standards are not intended to suggest methods for the assessment of compliance with their requirements. Appropriate indicators and different evaluation strategies and tools (e.g., data collection, feedback forms, interviews with participants and trainers, focus groups, devoted training sessions) will have to be identified by the evaluation team to assess compliance with different types of standards. On the other hand, additional indicators – unrelated to standards – are necessary to assess the outcomes and impact of a given training initiative (such as, e.g., attendance, participant satisfaction, learning outcomes, institutional change efforts).

HAVE ALL STANDARDS BEEN APPLIED WITHIN GE ACADEMY?

All standards have been considered in the design and roll-out of GE Academy training sessions, and most have been applied. It is to stress, however, that some standards have been applied to each session, while a few can be considered complied with only taking the whole programme as the reference unit for evaluation. Indications about these aspects can be found in the annotations accompanying each standard. Standards have finally been included in the evaluation activity of the project and represent one of the building blocks of the evaluation reports that have been issued.

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[8] As it will be specified below, the booklet adopts an intersectional perspective according to the gender+ approach, i.e., a gender-focused approach recognising that other axes of inequality always intersect gender (in its broadest sense), which is however maintained as the primary entry-point (see also: https://drive.google.com/file/d/13EvvMKWX1FoGAoMJNAa1mFN9cEUdgba8/view)

[9] Outcome standards stipulate that the adopters have to deliver a specific, identifiable outcome, while process standards highlight internal management processes without predetermining any specific outcomes (Brunsson, Rasche & Seidl, 2012).

[10] Outcome standards are preferable "when coping with complex and dynamic environments, as they give sufficient scope to adopters to decide what measures are necessary to achieve them" (Black, Hopper & Band, 2007).

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GENDER TRAINING PRINCIPLES

Here below, a concise definition of the principles which have guided the identification and selection of the standards for the GE Academy training activity is given. These principles represent different angles and perspectives of the even more general principle of inclusiveness. Inclusive training is intended to contribute to promoting and practising social change by acknowledging and addressing exclusionary, power-based dynamics.

Participatory approaches and processes

The training process occurs in the spirit of participation, which entails that trainers actively share the power entailed by their position, so that knowledge, skills and attitudes are created for, by, and with the participants.

Empowerment

Training contents are linked to participants' professional experience, which is shared and validated to build a diverse base of knowledge. Participants are thus empowered to apply what they have learnt in their professional life.

Self-reflection and Reflexivity

Both trainers and participants constantly reflect on the training experience and learning process, acknowledging embedded power relations and reviewing their own practices and assumptions (self-reflection), while the very attitude to self-reflection is promoted and fostered (reflexivity).

Recognition of multiple interpretations of Feminism

In the training process, interpretations, knowledge and tools deriving from different strands of feminist thought are used to help participants identify the multiple aspects of gender inequality.

Contextualisation

The training process is context-specific and there is an effort to tailor it to the settings, situations, professional areas and needs of participants. This concerns all aspects of the training, including contents, methods, materials and organisation.

Recognition of multiple "Knowledges" and ways of knowing, and relevance of "ownership" of knowledge

Knowledge creation is regarded as a collective and inclusive process, and the diverse knowledges of participants are recognised, as well as how these are positioned differently. The training process accommodates the sharing of the diverse knowledge owned by participants and trainers, as well as different ways of knowing.

Shared aim of social Transformation

Gender training is not a stand-alone activity but is intended as part of a broader social transformation strategy addressing unequal gendered power relations.

Standpoint awareness and critical perspectives

The training process aims to make participants aware and respectful of the diversity of standpoints and identities which come into play in gender dynamics. At the same time, critical thinking is fostered, allowing to deconstruct these dynamics in order to better counter underlying social structures contributing to producing and reproducing gender inequality.

Intersectionality/Gender+

Gender training supports participants in recognising and acknowledging the interplay of gender inequality and other forms of inequality and discrimination (including racism, xenophobia, classism, ageism, homophobia, transphobia and ableism) and to avoid homogenisation and binary understanding of gender categories, to help build the capacity for addressing multiple forms of discrimination.

In particular, the booklet adopts **intersectionality in its "gender+" understanding**[11], i.e., a gender-focused approach recognising that other axes of inequality always intersect gender (in its broadest sense), which is however maintained as the primary entry-point.

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[11] See, for instance: Lombardo, E., Meier, P., & Verloo, M. (2017). Policymaking from a gender+ equality perspective. *Journal of Women, Politics & Policy*, *38*(1), 1-19.

LIST OF GENDER TRAINING STANDARDS

LIST OF STANDARDS FOR TRAINING ACTIONS WITHIN THE GE ACADEMY PROJECT

Abbreviations are used in the list of standards below (and some are also included in the description of standards in the next sections).

Abbreviations synthetically identifying the **training process phases** the standards refer to are the following:

DES   Training design
PL   Planning and preparation
IMP   Implementation
EV   Evaluation

Abbreviations identifying the **principles** in the PERFCKTSI model are:

P   Participatory approaches and processes
E   Empowerment
R   Self-reflection and Reflexivity
F   Recognition of multiple interpretations of Feminism
C   Contextualisation
K   Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge
T   Shared aim of social Transformation
S   Standpoint awareness and critical perspectives
I   Intersectionality/Gender+

GT   General Training standards (not specifically referring to a principle in the PERFCKTSI model)

	Standards	Principles
	TRAINING DESIGN	
DES1	A diagnosis of training needs is conducted to clearly define the training goals and inform training design	P, C
DES2	Training materials are relevant to the context of the participants	C
DES3	Participatory methods and techniques are built into the training design	P, E, K
DES4	E-learning and online platform development applies inclusive ICT design principles	I
DES5	Resistances are anticipated and addressed in the training design	C
DES6	Training design allows the integration of participants' experiences with gender	P, E
DES7	Training approaches are designed to encourage self-reflection and reflexivity	R
DES8	The training is designed building upon multiple knowledges, skills and ways of knowing	P, E, K
DES9	Learning is designed to support institutional and social transformation	T
DES10	Training design relies on a theory of change	T
DES11	Critical feminist perspectives are integrated into training design	F, K, T, S
DES12	An intersectional approach is considered in training design	R, I
DES13	The training design includes the analysis of real-life examples	E, GT
DES14	Training materials are gender-sensitive and adopt an inclusive, intersectional perspective	I
	PLANNING AND PREPARATION	
PL1	The size and composition of the group are known ahead of time	P, C
PL2	The main features of the training are clearly communicated, so as to build realistic expectations	C, GT
PL3	Training is planned considering logistical and accessibility issues	C
PL4	The training facilitation team is gender-balanced and diverse	S, I
PL5	Social interaction is favoured to allow direct exchange among participants	P, GT
PL6	The physical or virtual environment where training formats are implemented allows for the specific training methodologies adopted	P, GT
PL7	The training materials required to complete the training are accessible to all participants	P, GT
	IMPLEMENTATION	
IMP1	Participatory methods and techniques are applied in the training sessions	P, E, C, K
IMP2	Training contents are connected to participants' experience with gender	P, E, C
IMP3	Non-hierarchical modes of teaching and learning are used	P, E, C
IMP4	The training highlights the power dynamics of science	K, S
IMP5	Participants' self-reflection and reflexivity are actively encouraged during the training	R, S, I
IMP6	Resistances are recognised as a necessary part of the learning process and addressed accordingly	P
IMP7	Gender-sensitive language is used during the training	S, I, GT
IMP8	In the follow-up phase, participants are encouraged and helped to join a community of practice	P

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	Standards	**Principles**
	EVALUATION	
Ev1	Evaluation instruments are matched to the training formats	GT
Ev2	Evaluation questions are used that invoke the critical reflection of participants	R, GT
Ev3	Participants are actively involved throughout the evaluation process and informed of its results	P
Ev4	Monitoring and evaluation procedures are an integral part of the training activity	R, GT
Ev5	Trainers' peer-evaluation is used	R, GT
Ev6	Both quantitative and qualitative indicators are used in the evaluation	GT
Ev7	Evaluation results are analysed from an intersectional perspective	I
Ev8	The training content is accessible for participants after the end of the training	P, GT
Ev9	Follow-up evaluation is carried out	T, GT

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GENDER TRAINING STANDARDS
with descriptions and annotations

PHASE ONE – TRAINING DESIGN

DES1 - A diagnosis of training needs is conducted to clearly define the training goals and inform training design

Description:	
A training needs assessment is conducted to reach a clear understanding of the strategic goals to be pursued and to support the design of the training formats. The training needs analysis is conducted involving the potential audiences to identify the different perspectives to be included in the training design for all the aspects of the training, including content, methods and materials.	
PRINCIPLE(S)	o Participatory approaches and process o Contextualisation

ANNOTATION	The formulation of the standard includes training programmes of different scope and duration. For this reason, its wording has been kept broad enough to adapt to different training situations and contexts. In broad programmes, where many training formats and sessions are foreseen in different countries and types of institutions, target audiences are consulted through interviews, questionnaires or focus groups. For stand-alone training sessions or smaller programmes, and for trainings held in settings which are well-known to the trainers, training needs analysis and consultations can be downsized as appropriate.

DES2 - Training materials are relevant to the context of the participants

Description:	
Training materials are sensitive to the specific institutional, political, geographical or disciplinary context of the targeted participants, as appropriate to the topic of the training, including regulatory and policy frameworks, when relevant. To this aim, training materials are developed including customised case studies and exercises.	
PRINCIPLE(S)	o Contextualisation

ANNOTATION	This standard is easier to apply when the training sessions address participants from the same organisations or the same disciplinary fields, and/or from organisations located in the same geographical context. Its application becomes more problematic when participants come from very different contexts (typically, online training sessions). However, this standard remains important to encourage the trainers to take into consideration the possible contextual variables that could come into play.

DES3 - Participatory methods and techniques are built into the training design

Description:	
Training formats (content, methods and materials) are designed to actively involve participants through interactive exercises and participatory learning processes.	
PRINCIPLE(S)	o Participatory approaches and process o Empowerment o Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge

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ANNOTATION	This standard can be fully applied to longer training formats or formats involving a limited number of participants, allowing frequent and direct interactions. These also include online formats, as online learning environments can also be designed to facilitate participation and engagement. In the case of shorter formats or formats addressing a high number of participants (such as, for instance, webinars or online roundtables), its application is more challenging. However, even in these formats, participatory elements can be included as appropriate, such as instant polling, attentive use of the chatbox or even just the allocation of sufficient time slots for discussion.

DES4 - E-learning and online platform development applies inclusive ICT design principles

Description:
Gender-sensitive and inclusive ICT design principles are applied to e-learning and online platform development, profiling different types of potential users and taking into account multiple forms of inequality in building usage scenarios and promoting inclusive user experience and accessibility. Open web standards are used in developing the e-learning platform to facilitate interoperability and sharing of knowledge.

PRINCIPLE(S)	o Intersectionality/gender+

ANNOTATION	This standard, mostly addressing online or hybrid sessions, is directly applicable to online platforms (like MOOCs or DOCCs[12]), that need to be inclusive by design (guides to inclusive design for ICT are available on the internet[13]). In the case of other online formats, this standard will guide the choice of existing webinar or meeting services, selecting those that provide, for instance, more efficient tools supporting people with impairments (like captions and subtitles for video lectures or live sessions).

DES5 - Resistances are anticipated and addressed in the training design

Description:
Resistances are recognised as an inevitable consequence of challenging participants' beliefs and attitudes through the training and are considered in the design. Strategies to deal with resistances, as appropriate and relevant to the training topic, are developed taking into account specific national/regional challenges, as well as institutional and disciplinary contexts.

PRINCIPLE(S)	o Contextualisation

ANNOTATION	This standard addresses the inevitable presence of resistances, inviting to include methods and tools allowing resistances to emerge and be managed. Anticipating and addressing resistances already in the design phase is particularly needed when the training focuses on controversial topics or is implemented in challenging institutional or national contexts. One of the most practised strategies is providing facts, figures, and indicators to counter the tendency of some participants (both women and men) to deny the existence of gender inequality (especially when their own working environment is concerned) or to overlook its impact (for example, on women's access to leadership positions, scientific recognition, funds, and other resources).

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[12] Massive Open Online Courses and Distributed Open Online Courses. See: https://ge-academy.eu/distributed-open-collaborative-courses-doccs-call-for-participating-institutions-nodes/

[13] For a collection of guidance tools, see for instance: https://universaldesign.ie/technology-ict/universal-design-for-ict/

DES6 - Training design allows the integration of participants' experiences with gender

Description:	
Gender training design ensures that participants' personal and professional experiences with gender are integral to the learning process, to support the identification of unequal power relations leading to culturally accepted structural disadvantage.	
PRINCIPLE(S)	o Participatory approaches and process o Empowerment

ANNOTATION	Adequate participatory space and tools need to be provided to have participants share their experiences with gender. Possibly including work in pairs or small groups might facilitate participants in reporting the challenges they met in their own institution about the topic of the training. This is also a useful strategy in sessions devoted to gender/sex variables in research, where the experience of participant researchers on the matter within their own research work can be shared as part of the training process.

DES7 - Training approaches are designed to encourage self-reflection and reflexivity

Description:	
Training design includes methods encouraging participants to re-examine their own personal attitudes and behaviours, professional experience and working environment to achieve a deeper understanding of existing structures of subordination, going beyond consolidated beliefs and taken-for-granted representations.	
PRINCIPLE(S)	o Self-reflection and reflexivity

ANNOTATION	Some practical examples are provided below for the application of this standard. - In preparation for a session on sexual harassment, participants can be asked to investigate which policies are in place in their institutions and what are their relevant national legal frameworks. - In the design of online training on work-life balance, it can be foreseen that – at the end of the presentation – the trainer shares a poll where participants have to vote from 0 to 10 to describe the level of work-life balance supported at their institution. - Space can be dedicated, in the training design, to encourage participants to think about how to transfer the content of the training into their professional lives. - In training sessions on sex and gender variables in research, participants can be encouraged to work in duos or small groups and engage with one another to reflect critically on their own practice, considering how gender issues could be relevant to their research projects. It can finally be mentioned that the role-play technique is particularly effective in supporting self-reflection processes and can be usefully included in the training script.

DES8 - The training is designed building upon multiple knowledges, skills and ways of knowing

Description:	
Training designs acknowledges and integrates different forms of professional and experiential knowledge, allowing participants to engage in collective and inclusive knowledge sharing and co-creation processes.	
PRINCIPLE(S)	o Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge Participatory approaches and process o Empowerment

ANNOTATION	This standard is also suitable for webinars and online roundtables, where different voices can be given the floor and attention can be placed on intersectional/gender+ considerations in the composition of the groups of speakers and panellists. Train-the-Trainers sessions are also particularly well-suited to give participants space in the programme to share and make the most of their knowledge, skills, and experiences. Finally, formats such as the DOCC (Distributed Online Collaborative Courses) are fully responding to this standard, inasmuch they foresee that the contents can be produced by external "nodes" and shared on the platform.

DES9 - Learning is designed to support institutional and social transformation

Description:	
Gender training supports participants to build their competence to promote social and organisational change in scientific settings. This includes the experiential, motivational, and practical elements to be mobilised to incorporate gender considerations and perspectives into an organisation's activities (change management strategies, design of gender equality plans, etc.), with the aim of redressing unequal power relations.	

PRINCIPLE(S)	o Shared aim of social transformation

ANNOTATION	This standard makes explicit an assumption of all gender training initiatives, i.e., that training is challenging the social and organisational dynamics that produce and reproduce gender inequality, which is even more relevant in the case of gender training in the framework of programmes of institutional transformation. Participatory exercises identifying the most relevant actions to undertake at one's own institution in the domains addressed by the training are for instance responding to this aim.

DES10 - Training design relies on a theory of change

Description:	
Training design specifies and incorporates in the training the theory of change it is going to apply (i.e., the theory about how social change for gender equality happens). This includes different aspects, such as interpreting the social and institutional context, identifying the desired changes, providing a view of the change process, singling out actions and actors, and pinpointing risks and strategies to overcome them.	

PRINCIPLE(S)	o Shared aim of social transformation

ANNOTATION	The connection to theories of change can be supported in at least two ways. On the one hand, the training session is itself conceived as one component of a wider gender equality strategy, and it is presented in its role within the change process. On the other hand, training topics (for example, how to mobilise internal change agents) are addressed based on a specific theory of change (for instance, identifying the key factors allowing to successfully reach out and involve increasingly wider circles of internal stakeholders).

DES11 - Critical feminist perspectives are integrated into training design

Description:

Gender training supports the understanding of the structural character of gender inequality and the dynamics producing and reproducing it. Drawing on the vast stock of knowledge and experience developed within diverse feminist strands, different items can be covered, depending on training objectives. Among these: gender bias, trait ascription and stereotypes; the mechanisms of knowledge production; the interaction between individual, interpersonal, ideological, and institutional factors, as well as socioeconomic and power/privilege factors, in generating and perpetuating inequality; the multiple dimensions of one's personal and social identity and their role in shaping gender relations.

PRINCIPLE(S)	o Standpoint awareness and critical perspectives
	o Recognition of multiple interpretations of feminism
	o Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge
	o Shared aim of social transformation

| **ANNOTATION** | This standard can be applied within individual training sessions by including exercises on power and privilege (such as, e.g., the "privilege walk") or incorporating a module on unconscious bias or data on gender and precarious academic careers – as relevant – in a variety of topics, such as recruitment and promotion processes, the building of indicators, as well as gender in teaching and research contents. Concerning teaching and research content, this standard is key in developing activities and exercises aimed at developing participants' gendered analytical understanding of their areas of expertise, e.g. by raising awareness of double gender bias inherent in digital health services. |
| | The standard can also be applied at the level of an overall training programme (for instance by giving voice to different perspectives using speakers, experts and panellists from diverse backgrounds in webinars, roundtables and other relevant sessions. |

DES12 - An intersectional approach is considered in training design

Description:

An intersectional approach is considered, as appropriate, in the design of training contents, methods and materials, as well as in course presentation and the choice of examples and case studies. This entails avoiding gender binaries and the identification of "men" and "women" as homogenous categories, instead considering the many interlocked dynamics producing inequality – such as sexism, racism, xenophobia, homophobia, transphobia, ableism, or classism.

| **PRINCIPLE(S)** | o Intersectionality/gender+ |
| | o Self-reflection and reflexivity |

| **ANNOTATION** | There are several possible levels of application of this standard in training design. In training sessions, the presentation of facts and figures disaggregated by gender can be followed by the presentation of the same data according to other, intersected, inequality grounds, for instance, zooming on the motherhood or the ethnicity penalty, showing even higher levels of inequality and raising the awareness of participants. Intersectionality can also be addressed in the very content of the training, such as in sessions addressing sex and gender variables in research, where the topic can be of particular salience[14]. Another level concerns the language used by the trainer, that should be careful to avoid all simplistic, binary categorisations. Finally, intersectionality is connected to the inclusiveness and accessibility of the training itself, which should consider multiple potential inequality grounds. |

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[14] See, for instance: https://genderedinnovations.stanford.edu/what-is-gendered-innovations.html

DES13 - The training design includes the analysis of real-life examples

Description:	
Real-life examples and experiences, as well as hands-on sessions on real case studies, are planned in the design phase, as appropriate to the topic and set-up of the session, allowing participants to perceive the actual complexity of gender-related dynamics and actions and to test strategies and tools to manage them.	

PRINCIPLE(S)	o Empowerment
	o General training standard

ANNOTATION	Even though this standard is easier to apply in longer and more participatory formats, efforts should be made to include references to real-life experiences and cases in a variety of formats and for many different topics. It is especially important in sex/gender-in-research training, in order to allow participants to directly observe the use of sex and gender variables in the research process. The possibility of working on real materials, such as, e.g., applications for research grants or research articles could be foreseen to this aim. In online formats, the analysis of case studies and home-based assignments can be considered.

DES14 - Training materials are gender-sensitive and adopt an inclusive, intersectional perspective

Description:	
To appropriately represent and conceptually frame gender equality, training materials are gender-sensitive and adopt inclusive, intersectional approaches. This entails the use of images, examples and case studies displaying diversity from different perspectives (gender, ethnicity, religion, sexual orientation, etc.) to highlight the multiple factors of potential inequality affecting research institutions and research systems.	

PRINCIPLE(S)	o Intersectionality/gender+

ANNOTATION	This standard reflects the principle of intersectionality with a specific focus on training materials like presentations, case studies, data and statistics, scientific articles, etc., to be designed or selected alongside the scripts of training sessions. The accessibility of all training materials for people with different types of impairments must also be considered.

GE ACADEMY

PHASE TWO – PLANNING AND PREPARATION

PL1 - The size and composition of the group are known ahead of time

Description:

Information about the group of participants to the training sessions is collected beforehand and considered to fine-tune the general training formats. Relevant information about each potential participant is collected through the enrolment questionnaire, including the level of prior knowledge on the topic at hand.

PRINCIPLE(S)	o Contextualisation o Participatory approaches and process

ANNOTATION	Among the information to be collected, position within the organisation, starting level/experience, reasons and objectives to attend the training can be mentioned. As for group size, a minimum/maximum number of participants could be settled depending on the training. Information about group size is necessary to also ensure that the participatory approaches and tools identified in the design phase can be appropriately applied.

PL2 - The main features of the training are clearly communicated, to build realistic expectations

Description:

Training objectives, methods and expected outcomes are clearly and timely communicated to the hosting institution and potential participants, including what the training is not about, so that consistent expectations are established. This does not preclude more specific articulation and management of participant expectations during the training experience.

PRINCIPLE(S)	o Contextualisation o General training standard

ANNOTATION	Learning objectives can be clearly listed on the web page and general communication materials of the training, as well as in the welcoming email to participants upon registration. In addition, participants can be asked about their expectations in ex-ante questionnaires to fill out before the training session, allowing the trainers to fine-tune the session to some extent. Finally, expectations can be shortly laid out at the beginning of the training, and participants can be asked (in forms suitable to the setup of the session) to express theirs, which can still allow for some tailoring, for instance in the choice of examples.

PL3 - Training is planned considering logistical and accessibility issues

Description:

In planning training sessions, special attention is paid to match the logistical needs of the hosting institution. Similarly, the requirements of diverse participants are considered, including, e.g., work-life balance needs, eating habits, accessibility for people with impairments, inclusiveness of software and online tools.

PRINCIPLE(S)	o Contextualisation

ANNOTATION	Agreements can be made with hosting organisations in terms of the suitability of the training schedule for potential participants, as well as the accessibility of the training room and connected spaces, but also computers, software and online tools and handouts that are needed for the training. For online sessions, in particular, the adoption of solutions like including captions, transcripts or subtitles for video lectures and live sessions is recommended to support the participation of people with impairments. In general, it is important to include a question about possible impairments in the registration form, so as to adopt the most appropriate measures to improve accessibility for all.

PL4 - The training facilitation team is gender-balanced and diverse

Description:	
Gender balance and diversity on different grounds are sought in the composition of the training facilitation team, favouring the inclusion and visibility of different standpoints in the training process.	
PRINCIPLE(S)	o Intersectionality/gender+ o Standpoint awareness

ANNOTATION	The relevance and feasibility of the standard are to be assessed on a case-by-case basis by the training team, also considering it could have cost implications. In general terms, matching this standard could turn out to be difficult since the experts and trainers in the area of gender issues are still in great majority women. However, it remains useful in the planning and preparation phase to encourage efforts to increase as much as possible the diversity and gender balance of the training facilitation team.

PL5 - Social interaction is favoured to allow direct exchange among participants

Description:	
Opportunities for free and unstructured direct exchange among participants are included in the training schedule so as to also encourage the active engagement of all.	
PRINCIPLE(S)	o Participatory approaches and process o General training standard

ANNOTATION	This standard is easier to apply in in-person formats, and in sessions of longer duration, where participants have enough time to get closer to each other. The most direct tool is that of including ample breaks in the training schedule. Other, more structured tools can be used, also in the case of online formats. For instance, mixing the composition of break-out rooms is important to have participants get in touch with people that are not in their same area or institution, as well as asking participants if they agree that their contact details are shared in the group, to allow contacts after the session. In online sessions, break-out rooms can be set and left open for participants to join during breaks – if they want – to have a direct exchange or just a chat with other participants. This standard, beyond being in general related to the quality of training formats, is also important in the application of participatory approaches and processes.

PL6 - The physical or virtual environment where training formats are implemented allows for the specific training methodologies adopted

Description:
In the case of in-person training sessions, room set-up supports participatory techniques, favours debate and allows for the selected training methodologies to be applied. Roundtable can for instance be used, when relevant, instead of classroom-style arrangements. In the case of online training, the necessary software to apply the relevant participatory techniques is used.

PRINCIPLE(S)	o Participatory approaches and process o General training standard

ANNOTATION	In in-person training, room size is adapted to the group, so that participants cannot go in the back, with the risk of being marginalised in the discussion, and a flexible seating approach can be applied. In online training, tools like virtual whiteboards, collaborative editing, and instant polling can be useful.

PL7 - The training materials required to complete the training are accessible to all participants

Description:
All participants are enabled to access the tools that are needed to fully take advantage of the complete set of training resources, and use them independently.

PRINCIPLE(S)	o Participatory approaches and process o General training standard

ANNOTATION	This standard is connected to the inclusiveness level of the training process and is a requirement to allow the application of participatory approaches. Training materials should be selected among those following open access schemes and freely available.

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PHASE THREE – IMPLEMENTATION

IMP1 - Participatory methods and techniques are applied in the training sessions

Description:	
The participatory methods and techniques identified in the design phase are implemented and fine-tuned to the individual training sessions, so as to respond to group features and processes.	
PRINCIPLE(S)	o Participatory approaches and process o Empowerment o Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge o Contextualisation

ANNOTATION	The implementation of this standard is strongly dependent on the training format (see the annotation of standard DES3, above) and topic, as well as the specific experience and skills of the trainer. It is also important that in the description of the event it is clearly communicated that participatory methods/techniques will be used.

IMP2 - Training contents are connected to participants' experience with gender

Description:	
During the training sessions, contents are presented and further elaborated by connecting them to the personal and professional experience and situations of the group of participants, so as to highlight relevant inequality structures and dynamics related to gender.	
PRINCIPLE(S)	o Participatory approaches and process o Empowerment o Contextualisation

ANNOTATION	Previous knowledge of the professional situation of participants and institutional features of the involved organisation/s is key for allowing examples to be given, comparisons to be made, etc. that are relevant to participants' experience, making it easier to connect to their personal and professional experience.

IMP3 - Non-hierarchical modes of teaching and learning are used

Description:	
Gender training sessions promote the circulation of knowledge rather than just a top-down process of knowledge transfer, in a non-hierarchical model that empowers participants to apply their new and pre-existing knowledge and skills.	
PRINCIPLE(S)	o Participatory approaches and process o Empowerment o Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge o Contextualisation

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ANNOTATION	Based on the specific objectives and topics of the training, the right balance of top-down knowledge transfer and horizontal circulation of knowledge needs to be determined. Rotating roles can be foreseen, for example, when, after working in sub-groups, participants are reporting to the plenary. Also, volunteers can be identified among participants to facilitate sub-groups, thus favouring non-hierarchical relations within the session. This also calls trainers to use an approach that allows for considerations and knowledge stemming from the audience, to challenge their own perspectives, and/or acknowledge the collective origin of the knowledge they are sharing.

IMP4 - The training highlights the power dynamics of science

Description:	
Training methods support participants in building awareness of power dynamics and power imbalances involved in the construction of science as a male-dominated social institution (including the production of scientific knowledge).	

PRINCIPLE(S)	o Recognition of multiple "knowledges" and ways of knowing, and relevance of "ownership" of knowledge o Standpoint awareness and critical approaches

ANNOTATION	Deconstruction practices can be applied during the session, for instance by providing contextualised examples or guiding the discussion among participants so as to highlight institutional practices and their implicit power dynamics, thus allowing participants to recognise them in, e.g., the policy discourse about science, the identification of scientific excellence, but also in the conceptualisation of the scientific process or the use of gendered scientific metaphors.

IMP5 - Participants' self-reflection and reflexivity are actively encouraged during the training

Description:	
Approaches supporting self-reflection and reflexivity are practised in training sessions in order to encourage participants to identify their own blindness, resistances and biases concerning gender, and make them visible and open to discussion.	

PRINCIPLE(S)	o Self-reflection and reflexivity o Standpoint awareness and critical perspectives o Intersectionality/gender+

ANNOTATION	As an example, trainers openly discussing their own biases and positionalities favour this process, reducing oppositional and judgemental attitudes. Also, resistance towards the training can be asked to participants in initial ice-breaking exercises.

IMP6 - Resistances are recognised as a necessary part of the learning process and addressed accordingly

Description: Strategies to address resistances – both those anticipated in training design and unexpected ones – are deployed in the training. These should not be aimed to defend the trainer's authority or position, but to use resistances as critical tools and leverages to deepen the participants' and trainers' understanding of the complexity of the issues involved in gender equality while supporting group learning processes and participation.	
PRINCIPLE(S)	o Participatory approaches and processes

ANNOTATION	The application of this standard is strongly linked to the trainer's skills (see the Gender+ trainer profile, below) to remain calm and use resistances as a tool for self-reflection and deconstruction of implicit biases and assumptions, as well as self-reflection of the trainers. Inviting other participants to share their views and experiences is often useful to manage the situation while making the most of it to support participants' awareness and the learning process in general.

IMP7 - Gender-sensitive language is used during the training

Description: Gender-sensitive language is used throughout the training process (from advertisement to evaluation).	
PRINCIPLE(S)	o Standpoint awareness and critical perspectives o Intersectionality/gender+ o General training standard

ANNOTATION	A way to support the awareness of the importance of paying attention to language is asking participants to introduce themselves, in the initial part of the training, with their names and pronouns. Trainers can also be presented along with their pronouns on the web page and communication tools of the training session. Also, particular attention needs to be paid to the formulation of questions about participants in registration forms and questionnaires for participants.

IMP8 - In the follow-up phase, participants are encouraged and helped to join a community of practice

Description: After the end of the training experience, participants are supported to become part of an existing community of practice, including practitioners and gender experts, or to create a new one, so as to continue to have access to opportunities and resources and to further develop their skills and knowledge on gender equality.	
PRINCIPLE(S)	o Participatory approaches and processes

ANNOTATION	After a training session or a series of sessions, participants can be encouraged and supported to join existing groups on social media or to build their own, to stay in contact and continue the mutual learning experience. This is often the case with formats such as the DOCC, which avail themselves of online platforms already favouring the creation of virtual networks that can be continued after the end of the training period. This standard is to be considered also as a means to counter possible factors (related to participants' personal conditions or their geographical context) hindering or impeding them to keep on engaging in gender equality issues.

PHASE FOUR – EVALUATION

EV1 - Evaluation instruments are matched to the training formats

Description:
Evaluation tools and procedures are designed taking into account the features and objectives of the different training formats and their specific topics.

PRINCIPLE(S)	o General training standard

ANNOTATION	Evaluation tools like ex-ante or exit questionnaires, observation grids and trainers' surveys need to be designed and subsequently tailored to the specific features of the session, which can largely vary according to the different training formats and their specific set-up, topic and objectives.

EV2 - Evaluation questions are used that invoke the critical reflection of participants

Description:
Evaluation processes contribute to the development of critical thinking and open-mindedness with respect to gender equality. To this aim, evaluation questions are crafted to urge participants to critically reflect on the training experience and the topics dealt with in the training process.

PRINCIPLE(S)	o Self-reflection and reflexivity
	o General training standard

ANNOTATION	The application of this standard may require the introduction of appropriate spaces and tools in the agenda of the training (which is easier in longer training formats). For example, rather than just using questionnaires to get feedback from participants, it could be more effective, when possible, to plan a feedback session at the end of the training (see also EV3, below).

EV3 - Participants are actively involved throughout the evaluation process and informed of its results

Description:
Consistently with participatory evaluation approaches, the evaluation methodology is responsive and includes participants' perspectives, identifying the appropriate tools and procedures for collecting their points of view and feedback throughout the training process, including sharing and discussion of evaluation results.

PRINCIPLE(S)	o Participatory approaches and process

ANNOTATION	How this standard can be applied varies according to the type and duration of the training format. While in training programmes spanning across several days or sessions, different occasions can be identified to collect and discuss feedback from participants (that can be used to adapt the subsequent sessions), in shorter, one-off training formats this can be generally only accomplished at the end of the session through feedback forms. Another way of including participants' perspectives into the training is through ex-ante questionnaires collecting - inter alia - participant expectations. These can influence the tailoring of content and approach and can be presented at the beginning of the session to show how and to what extent they were taken into account, for the participants to assess.

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Ev4 - Monitoring and evaluation procedures are an integral part of the training activity

Description:	
Monitoring and evaluation activities are fully integrated into the training process, providing constant feedback for the further development of training formats and trainers' competencies.	
PRINCIPLE(S)	o Self-reflection and reflectivity o General training standard

ANNOTATION	This standard highlights the need to plan the inclusion of appropriate monitoring and evaluation means as part of the training design process. This also entails the use of different types of monitoring and evaluation tools (debriefing meetings with trainers, feedback sessions with the participants, monitoring sessions involving the team, etc.). This standard, which has cost implications, is particularly suited for broad training programmes, where quality can be increased based on constant monitoring and evaluation activities, while it needs adaptation/downsizing in case of shorter, one-off training sessions.

Ev5 - Trainers' peer-evaluation is used

Description:	
Peer-evaluation approaches are used when introducing new training formats or scripts, or when a trainer is new to a format or subject. In this case, trainers work in pairs, intending to provide detailed feedback to one another, also supporting mutual learning and self-reflection.	
PRINCIPLE(S)	o Self-reflection and reflexivity o General training standard

ANNOTATION	The trainers' peer-evaluation is not provided by an independent party, and it mostly aims to support trainers. This approach is particularly useful when the training format is not consolidated yet, and uncertainties about how to implement it are high (e.g., sex/gender-in-research training).

Ev6 - Both quantitative and qualitative indicators are used in the evaluation

Description:	
To account for the complexity of the factors affecting gender training, the evaluation approach includes the use of both quantitative and qualitative indicators to assess outputs, outcomes and impact.	
PRINCIPLE(S)	o General training standard

ANNOTATION	Both qualitative and quantitative questions are included in evaluation questionnaires. In longer training formats, such as summer schools, qualitative feedback-collection sessions are included in the script, with additional open questions – prepared in advance – to be discussed in plenary.

Ev7 - Evaluation results are analysed from an intersectional perspective

Description:	
The inclusion of intersectional approaches in the training design phase calls for the analysis of evaluation data from the same perspective, with the aim to observe the influence on evaluation results of the multiple factors of potential inequality among participants.	
PRINCIPLE(S)	o Intersectionality/gender+

ANNOTATION	Socio-demographic questions aimed at collecting information feeding intersectional analysis of participation in and results of the training sessions can be included in ex-ante and exit questionnaires, to improve training design to support inclusiveness. The inclusion of such questions in evaluation tools needs however to be handled with care, as these are considered extremely sensitive aspects. The voluntary character of questions needs to be highlighted, anonymity and confidentiality strictly respected, safety regulations and data minimisation principles applied.

Ev8 - The training content is accessible for participants after the end of the training

Description:	
A set of procedures is in place allowing participants to access the training content once the implementation of the training initiative has ended.	

PRINCIPLE(S)	o Participatory approaches and process
	o General training standard

ANNOTATION	Training contents can be made available online. Video sharing and social media platforms can be used for this aim.

Ev9 - Follow-up evaluation is carried out

Description:

To more reliably assess the effectiveness of the training, as well as its outcomes and impact, follow-up evaluation with participants is carried out, 3 to 12 months after the training has taken place.

PRINCIPLE(S)	o Shared aim of social transformation
	o General training standard

ANNOTATION	The application of this standard – aimed at assessing the longer-term effects of the training, beyond the appreciation of participants – is particularly recommended in training programmes structurally connected with institutional change/Gender Equality Plans in research organisations. To be applied, however, it requires an adequate organisational/institutional context for the training programme, providing for some continuity over an extended timeframe. An effort needs to be made to identify effective incentives for former participants to answer the survey, because the risk is otherwise that response rates remain very low.

LIST OF QUALITY CRITERIA FOR TRAINERS

Introduction

This section of the booklet is devoted to standards concerning the profile of the trainers. These standards are different from those in previous sections for both their subject and use.

As for the **subject**, they are not focused on the training sessions, but on skills, capacities, and attitudes of trainers in general.

Consequently, their **suggested use** is not to evaluate training initiatives, but, e.g., for the certification of trainers, for helping trainers in conducting a self-assessment exercise, or for designing and developing train-the-trainers and coaching programmes.

In this section, the **gender+** understanding of intersectionality is adopted as the overarching framework that holds together the ideal competencies of gender trainers (for the concept of gender+ see above, in the list of gender training principles).

GENDER+ TRAINER PROFILE

BASIC EXPERTISE

TR1 Trainers are knowledgeable of gender theories and able to apply critical feminist analysis, in general, and as relevant to R&I

TR2 Trainers have appropriate knowledge of international, European and, when relevant, national legal and policy frameworks for gender+ equality

TR3 Trainers are knowledgeable of organisational change processes and the tools used to mainstream gender+ equality in policies and programmes of institutions

METHODOLOGICAL SKILLS

TR4 Trainers can design and facilitate gender-sensitive work in the group

TR5 Trainers can lead reflection processes in terms of gender roles and facilitate learning by self-discovery

TR6 Trainers are able to apply feminist pedagogical principles in their training practice

TR7 Trainers are able to operationalise gender+ knowledge to fit the practice of the training audience and support the participants' next steps as change agents into their organisation

TR8 Trainers use gender-sensitive language

TR9 Trainers are able to challenge participants' prejudice regarding gender+ issues in a constructive, empowering manner and to integrate resistances in the learning process

PERSONAL AND SOCIAL COMPETENCE

TR10 Trainers are self-reflective and able to promote self-reflection

TR11 Trainers are able to respond flexibly to unanticipated circumstances

TR12 Trainers are able to accept and manage criticism and to promote an inclusive, constructive climate where the opinions of all are valued

TR13 Trainers are committed to transformative change for gender equality

TR14 Trainers have intercultural skills and are able to communicate the relevance of gender+ issues to people from different backgrounds and different sectors

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