supera

Supporting the Promotion of Equality
in Research and Academia

[Agreement nº 787829]

Participatory approaches towards GEP design and implementation SUPERA guide

YELLOW WINDOW

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List of Abbreviations

CA   Consortium Agreement

DoA   Description of Activities

GA   Grant Agreement

EC   European Commission

EU   European Union

GE   Gender Equality

GE Hubs   Gender Equality Hubs

GEP   Gender Equality Plan

GM   Gender Mainstreaming

MICIN   Ministerio de Ciencia e Innovación (ES)

RAS   Regione Autonoma della Sardegna (IT)

RFO   Research Funding Organisation

RPO   Research Performing Organisation

WP   Work Package

UC-CES   Centro de Estudos Sociais (Universidade de Coimbra) (PT)

UCM   Universidad Complutense de Madrid (ES)

UNICA   Università degli Studi di Cagliari (IT)

YW   Yellow Window

Background

This guide on how to facilitate participation from stakeholders in the design and implementation of Gender equality Plans (GEPs), has been developed based on the experience of the SUPERA project. SUPERA is one of the many projects that received support from the EC's H2020 programme to foster institutional change and more gender equality.

The main aim of the SUPERA project was to develop and implement Gender Equality Plans in six European institutions (four in RPOs - Complutense University of Madrid; University of Cagliari; University of Coimbra; and Central European University - and two in RFOs -Spanish Ministry of Science, Innovation and Universities; and the Autonomous Region of Sardinia). The Consortium included two supporting partners: Yellow Window for training and technical assistance, and Sciences Po as the evaluator partner. The project's aim was to articulate a structural understanding of gender inequalities, looking at gender stereotypes and biases in research as a cross-cutting issue.

SUPERA followed was original because it followed a number of principles in its design and implementation that are presented in the figure below.

CUMULATIVE
- Building on previous projects, tools & know-how
- Benefiting from Supera's consortium excellence

INCLUSIVE
- Targeting the whole academic community
- Student involvement
- Participatory & collaborative methodologies

HOLISTIC

INNOVATIVE
- Action-oriented research & pilot testing
- Transformation design
- Holistic & user-centred approach

SUSTAINABLE
- Maximising visibility, accountability & outreach
- Management implication & long-term institutionalisation

Figure 1. The SUPERA principles

The innovative part of the clover above includes the use of **two innovative techniques** during the project: **Gender Equality Hubs** (GE hubs or Hubs further in the document) and **Fab Labs.** Both serve different purposes and are inspired from design thinking. These two techniques or concepts are instrumental in covering the inclusive dimension of the clover, as they are participatory techniques meant to facilitate the involvement of all stakeholders.

GE hubs and Fab Labs are an innovation. This means that SUPERA teams have been co-designing the concept and learning by doing. This document therefore is to be considered as a reference at the end of this challenging and interesting process of applying these techniques on complex institutional change processes like improving gender equality in research performing and research funding organisations.

1. Introduction

This document builds on the one hand on deliverable D4.2 "Step-by-step guide to set up and facilitate Gender Equality Hubs and Fab Labs" that was made available to the SUPERA core teams in each GEP implementing institution at the start of the project, and on the other hand on the actual experience of using these techniques. It aims at providing guidance to all those who will implement Gender Equality Plans on how to proceed with this type of techniques. This publication is meant as a reference document and guide for all who intend to use participatory techniques. The target of this publication are the members of the core team in charge of the GEP inside an institution, as well as those acting as change facilitators. Following the introduction (section 1), this guide is structured in three main sections: one dedicated to the design process of a Gender Equality Plan (section 2), a second one dedicated to 'Gender Equality Hub' (section 3) and a third to 'co-creation workshops' (section 4). In the SUPERA project, the concept of Fab Lab was used, but as these Fab Labs are co-creation workshops where stakeholders create solutions together, we will be using 'co-creation workshops' in this publication, only referring to Fab Lab when specific to the SUPERA context.

2. The design process of a Gender Equality Plan

The use of GE Hubs and of participatory techniques is linked; both are used in the context of the process of setting up a Gender Equality Plan (GEP). The chart below shows the different steps in the process of setting up a GEP.

The core team is responsible for setting up and managing the GEP process, and the GE Hub has a role to play in all steps of this process. This is reviewed in the section on the GE Hub below.
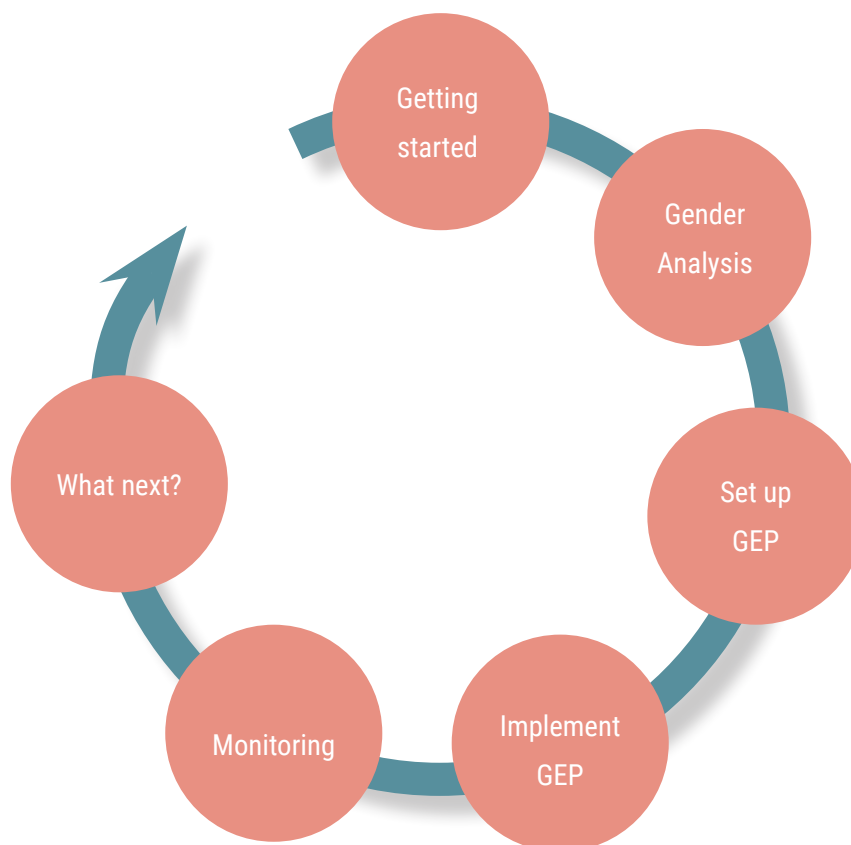
Figure 2. The 6 steps in a GEP process

This GEP process is a traditional step-by-step process. The best reference to understand the process, its context, typical obstacles, key requirements, and to access good practices and experiences is through the GEAR tool, available on the web site of the European Institute for Gender Equality (EIGE): https://eige.europa.eu/gender-mainstreaming/toolkits/gear.

Step-by-Step Guide

Step 1: Getting started

Step 2: Analysing and assessing the state-of-play in the institution

Step 3: setting up a Gender Equality Plan

Step 4: implementing a Gender Equality Plan

Step 5: monitoring progress and evaluating a Gender Equality Plan

Step 6: what comes after the Gender Equality Plan?

**Figure 3.** The GEP Step-by-Step Guide on EIGE's website

As mentioned above, the GE Hub and Fab Lab concepts used in SUPERA come from design thinking. Design is also a process, which should be considered as complementing the GEP process.

Design as a process or "design thinking" is a nonlinear process to harness creativity and develop solutions to problems. This has been applied since nearly one century on product development, for twenty years also on the development of services and more recently on the development of policies. The Design Council in the UK has introduced the concept of the double diamond to describe how the design process works. They present the design process as four consecutive phases whereby divergence and convergence are alternated. During the first phase "discovery" the focus is on divergence with exploration of a maximum of routes and ideas. During the second phase "define", the focus is on convergence. These two phases constitute the first "diamond", which is followed again by a diverging stage ("design") followed by a convergent stage ("develop") corresponding to the second diamond.

The diamond as metaphor expresses also the three dimensional or holistic approach of design. Another characteristic of design as a process is user involvement. Users and stakeholders are involved at all stages, including in the creative phase.
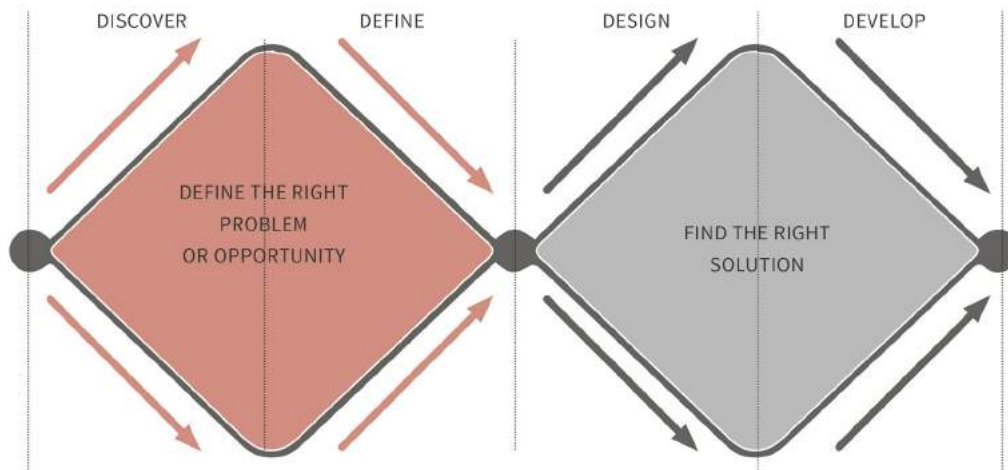
Figure 4. The design double diamond

Strictly speaking, this double diamond applies to the three first steps of the GEP process (see above for the 6 steps), as design stops when there is an approved and validated prototype ready to be launched. Nevertheless, in SUPERA, tools and techniques from design were also used during the implementation of the GEP. It is not because a GEP is designed, approved and implemented, that there are no new problems arising. The GEP does not have the intention to have solved all the problems as of its launch. Rather, the purpose of the GEP is to tackle various problems through its implementation. Furthermore, a key learning from others' experiences with GEPs tells that GEPs per definition should be approached with the necessary flexibility, whereby adaption and re-design along the way are regarded as inherent to the process. Also, GEP teams should be prepared to alter their approaches in order to make full use of any 'window of opportunity' that may arise in their institution. Specific (known or newly discovered) problems will need to be tackled during the GEP implementation: the problems need to be framed, analysed, insights need to be collected before developing and proposing solutions. For all these micro-processes, design thinking and therefore participatory methods can play a key role in developing solutions.

An institutional transformation process is complex and implies buy-in, support, a change of mentalities. Participatory techniques are a solution, but participation is not enough. Embedding participation in a holistic design process helps to create the conditions necessary to achieve the intended change.

Two important key elements of a design process are the use of visualisations and quick prototyping. The former is important as it helps to communicate and exchange during the whole process: whether it is to get an understanding of the problem, of the insights, of ideas or of potential solutions. The latter is a drive to action. Too often, teams in charge of GEP implementation will find (good) reasons to keep on analysing and studying. In design, one tries to move fast to results, and fail if needed. As soon as possible, a prototype is made to check if a planned solution works. If not, lessons can be drawn from the experience and improvements, or changes applied. These are the so-called "fail fast" and "fail forward" principles.

3. Gender Equality Hub

3.1. Background, meaning and scope of the concept

In this section we give a short explanation about the notion of 'hub' and in which contexts this is used; what it means in the context of GEP development.

The ex-ante definition used in SUPERA:

Gender Equality Hubs will involve all relevant stakeholders on a voluntary basis in each institution designing and implementing a GEP. They will be devoted to knowledge transfer, capacity-building, awareness-raising, the identification of problems or resistances to change, and the day-to-day implementation of GEPs.

The **core team** is the team inside the institution in charge of the GEP. This is in principle a group of people that has a formal responsibility and is accountable for the implementation of the GEP. This core team can take various forms in the different institutions, but its members are per definition also members of the GE Hub.

The **GE Hub,** can be a formal or an informal structure. In all cases it is a key element in support of the core team in charge of designing and implementing the GEP. The Hub is the **network of allies** of this core team.

Some institutions work with "antennas" or "focal points" in the different departments and faculties. If this is the case, these persons are also members of the hub, and can be considered as a 'second layer' of the hub, around the core team.

Apart from the core team members, a variety of people can be considered members of the Hub:

- Antennas or focal points in faculties and departments
- People who can act as trainers for the delivery of the training plan in the context of GEP implementation
- Trainers who can include GEP-related content into their trainings
- Administrative staff who will cooperate with the collection and provision of data
- Persons interested in the GEP and motivated to help in the implementation of specific activities (note that these can include students)
- Participants in co-creation workshops

The Gender Equality Hubs were used and interpreted based on each organisation's unique characteristics and context. The following three examples of CEU, UNICA and CES show the diversity of interpretations and the room for adaptations.

GE Hub as an informal, horizontal structure at CEU

The Gender Equality Hub of CEU is an informal, horizontal structure coordinated by the Gender Equality Officer; participants get involved on a voluntary basis. CEU keeps an open and participatory approach to the Gender Equality Hub: membership to the Hub is open on a rolling basis. It was instituted during the data collection phase in the gender equality audit. It includes members of the leadership as well as student volunteers and (administrative and academic) unit level allies, making sure that there are always representatives of key units for the advancement of gender equality present, such as HRO and Institutional Research Office (IRO). The initial recruitment process consisted of approaching Heads of administrative Units separately and asking them to designate somebody from their team to act as a Hub representative, preferably someone with either expertise or interest in the matter. Members of the academic body were directly approached and invited to participate mainly given their expertise on the topic and/or previous commitment to the cause. In the case of students, invitations to the Hub are received by those students who are part of the Equal Opportunity Committee and open calls are circulated at the beginning of the academic year and regularly thereafter. Students and employees are also invited when they proactively approach the Hub with gender equality related concerns or project ideas. The Hub members can leave and enter voluntarily at any point in time. When somebody leaves, they are asked to recommend a colleague from the same unit to replace them, and the Gender Equality Officer also proactively invites new members to join to keep the Hub alive. The invitation is informal and the communication with the Hub is kept active through a mailing list. Members of the Gender Equality Hub receive no training before joining but they are briefed on SUPERA and the functioning of the Hub in a meeting and supported by the Gender Equality internal SharePoint website. The Hub has no allocated budget.

GE Hub as a formal structure at UNICA

The Gender Equality Hub at UNICA involves different actors, and it was settled following a direct process where potential candidates were approached and asked to join the Hub on a voluntary basis combining in the same structure institutional leadership as well as student volunteers and departmental level allies. The Gender Equality Hub is expressly mentioned in the GEP document as an actor involved in the monitoring and implementation phase of the actions, therefore its existence as an operational body of the University has been formally recognised at the same time as the document was approved, even if no specific rules were envisaged for the process of replacing members or modifying its overall team. Its composition of the 14 members originally selected for their representativeness of all disciplinary areas and top positions in the technical-administrative structures of the University has been expanded through the appointment of two student representatives in the academic senate, in order to involve all the populations present in UNICA (teaching and research staff, technical-administrative staff, students) in the phases of implementation and monitoring of the GEP.

GE Hub as a formal and informal structure at CES (University of Coimbra)

The Gender Equality Hub at CES relies on formal and informal engagement from top leadership (including at the rectoral team), and allies at different departments/divisions, recruited as shortcomings were identified in the gender baseline assessment – mainly in the Human Resources and the Planning and Evaluation divisions, in the governing bodies (the General Council) and the Student Union. Further, and in order to facilitate the involvement of all faculties and research units, the Gender Equality Hub also includes a platform of 12 Gender Equality Focal Points, nominated by the director of each faculty/unit. Members, in general, were explicitly invited to take part in the Hub, which, due to its prominently informal character, is maintained via cooperation channels and through involvement in different events and initiatives pushing for gender equality in the institution. In that sense, participation in the Hub is quite varied, reflecting different levels of availability and engagement. This strategy, which is aligned with the SUPERA principles, allows for awareness-raising, informed commitment and dispersed actions for gender equality across the institution, while also ensuring decentralised enforcement responsibilities.

See here the short video in which Paula de Dios presents the experience developed by the Complutense University with the gender equality nodes network. The video briefly explains the UCM's approach to building its Hub by setting up a network of Gender Equality Nodes, spanning the different departments of the university.

3.2. The role of the GE Hub in the GEP process

The examples above show that a GE Hub can be a formal or a more informal structure. They also illustrate that the Hub can start as an informal network of allies, and evolve to become a more formal organ following the approval of the GEP. These examples also illustrate the important role the Hub can play throughout the GEP process as an extension and a support structure to the core team. Below is a description of this role, following the steps of the GEP process.

Getting started

Setting up the GE Hub when starting the GEP process is a way to involve, as from the start, the various stakeholders. In doing so, it allows to identify the allies and potential allies.

The recommendation is to organise a co-creation workshop (see further) during this first step, with as mission to set up the Hub. This is a good test of the application of co-creation techniques, and a way to involve stakeholders in defining the Hub from the start: its role, the modus operandi, the potential members to approach, etc.

Gender analysis

While collecting facts and figures to do the analysis, the Hub can play a role in facilitating access to data or collecting it.

But the Hub's role is probably even more important for translating these data into insights that can be used for designing the GEP. Again, co-creation workshops can be used to translate results into insights, leveraging on experiences, expertise and knowledge of Hub members.

Setting up the GEP

Setting up the GEP is a design process: designing an action plan covering the various thematic areas that should be part of a GEP.

The Hub can play a role, both in this design process and in validation of priorities and actions. Having the right members in the Hub will help to win the support needed to get through the formal approval process of the GEP by the institution.

Implementing the GEP

During implementation, both opportunities and problems will appear. The GEP is a plan, with priorities and actions to be undertaken. But a change process can be full of surprises. The Hub is the ally of the core team for various key dimensions in this period:

• Identifying opportunities: when going for change, opportunities that arise should be taken up, even

if they were not part of the initial plan. In GEP implementation, the focus should be on positive impacts, apart from solving problems or getting rid of barriers. The Hub, if well managed, can help to identify such opportunities and bring them to the attention of the core team.

- Identifying problems: when starting planned actions, problems and barriers might appear. These need to be tackled. The Hub can play a role in identifying problems, qualifying them, and in preparing the co-creation workshops to work out a solution.
- Linking to stakeholders: Hub members ideally come from all stakeholder categories. This is useful for the identification of both opportunities and problems, but also to open the doors when necessary in the context of implementation.
- Assist in setting up co-creation workshops: workshop participants can be recruited from among the Hub members, but the latter can also be a source for identifying other profiles that can usefully contribute to a workshop (finding solutions).
- Validate solutions: the Hub can be used to quickly check or validate potential solutions, before doing so more formally inside the organisation or towards the hierarchy. This helps to improve the solution, but often also to define the approach for introducing an innovation or change, anticipating reactions and resistances, defining the conditions under which success can be achieved.

Monitoring

The Hub will be a relevant and logical resource for any monitoring efforts that will be undertaken in the context of the GEP. Its members contribute to and participate in GEP-related activities and can provide useful insights in what works and what does not work.

Sustainability

Once the first GEP is launched, it is crucial to keep the dynamics of the GE Hub going. This will be key to the sustainability of the GE work in each institution. The Hub members will have built up experience and expertise throughout the GEP process and can provide important insights that will help optimising the strategy for a next GEP planning and implementation cycle.

The GE Hub at RAS, the Regional Authority of Sardinia included external stakeholders and was used to design the GEP:

From the very beginning, it was clear that the GEP design should be open to the contribution and critical analysis of a community of relevant external stakeholders. The adoption of a collaborative design approach ensured that the GEP integrates a shared vision and a multi-disciplinary perspective when considering imbalances among researchers and researchers' needs. As a result of this participatory approach, the institution got a stronger and more effective gender equality plan.

The stakeholders' engagement by RAS is described as an inspiring practice in SUPERA's Deliverable 6.3 "Guidelines and good practices for RFOs".

3.3. Setting up and facilitating a Gender Equality Hub

3.3.1. The process of starting up the GE Hub

It is recommended that the core team applies the design approach when setting up the GE Hub, starting with a "framing" phase as a short analytical or preparation phase, followed by a design phase and ending with a first prototype.

Phase 1 – Framing

The process can be started with a "framing workshop". Participants are the core team members and a limited number of allies. A good number of participants is around 8 to 12. Two main activities take place during this workshop:

- A stakeholder mapping: based on this mapping, potential members for the Hub are identified.
- A review of activities that are on-going as part of the diagnosis of the situation as input for the design of the GEP: this is done to identify potential gaps in the data collection needed for the diagnosis (e.g. are all possible resources identified?), as well as the need for allies and/or expertise for the data collection and analysis.

Phase 2 – design the Hub

During a co-creation workshop with the core team and up to 12 candidate Hub members, the following elements are defined:

- Mission of the Hub in the institution
- The Hub's composition and how the Hub is linked to the various stakeholders

- Rules of the game
- Processes to be used (co-creation workshops being one of them)

Phase 3 - Prototype – start of the Hub's functioning

It is proposed to devote a first Hub gathering to a co-design workshop in which the GEP is co-designed. It is probably too ambitious to design the GEP from scratch, as this would also mean sharing a lot of data and insights. With the structure of the GEP being defined, (a template is provided in another SUPERA publication). The workshop could concentrate on defining priorities and selecting directions for the actions to be undertaken.

If there are a lot of participants (many Hub members), small groups can work in parallel on different parts of the GEP (e.g. on human resources, on gender in research, …, on cross-cutting issues).

The core team can work with the results to further develop and finetune the initial GEP, before going through a test and validation phase.

This workshop would be a real prototype for the Hub and is, at the same time, an essential step in the process of designing the GEP.

3.3.2. Managing the GE Hub for maximum impact

The principle that the Hub is not a formal organ, and thus that membership is also informal, is both an opportunity and a risk. The opportunity is the flexibility and the openness of the concept. The risk is the lack of stability.

It will therefore be the core team's responsibility to develop techniques to maintain the Hub "alive and kicking". Techniques to be used can be aligned on how informal networks are functioning, with actions at different levels:

- Physical gatherings: paying attention to the frequency (not too many), the freedom to attend, the time management, and to ensure there is value for the participants and not only for the core team.
- Communication and exchange: using various media to both reach and avoid being too intrusive. Informing on success and impacts achieved to reinforce the sense of ownership and participation.
- Relationship building: this is a network of allies for the GEP; knowing each other is important and even more so for the core team members to know in how far the members are allies and can be of assistance.
- Participation in co-creation workshops: can be motivating and create a feeling of being part of the "GEP family" within the institution. This is powerful, but should be well managed, not over-asking enthusiasts, as well as communicating results and impacts.
- Openness of the core team to initiatives and ideas coming from the Hub members. It must be a two-directional process. Action ideas coming from Hub members have to be welcome and receive equal treatment as those identified within the core team.

4. Co-creation process

4.1. Background, meaning and scope of the concept

SUPERA's Grant Agreement document presents Fab Labs as follows:

Fab Labs will be ad-hoc, short-lived thematic structures established by each implementing partner, as many times and on as many subjects as needed. Their key tasks will be to:

• Bring together internal gender experts and stakeholders with external experts and/or advisors for the mobilisation of relevant knowledge, experience and interdisciplinary expertise.

• Engage key local stakeholders in GEP implementation, promoting ownership and co-creation's processes.

• Co-design innovative and practical solutions on a specific problem/issue identified by SUPERA.

• Prototype identified solutions so that they can be pilot-tested.

• Carry out pilot-tests and draw lessons on their potential to be scaled-up and transferred to other organisations/contexts.

Fab Labs within SUPERA were short co-creation processes with a diverse, ad hoc group of internal and possibly also external participants. Based on the experience and to make the concept more generic and less specific to the SUPERA project, we are using "co-creation process" instead of Fab Lab in this guide. Co-creation processes start with a clear mission (insights, a problem to solve) and end with an output, typically a prototype solution to the problem. This is a short, intense, co-creation process. Participants are a combination of users and experts. This process is facilitated.

A co-creation process would normally consist of one or more co-creation workshops.

4.2. Setting up and facilitating a co-creation process

4.2.1. When to use co-creation

A co-creation process is normally started with the purpose to solve a problem. The problem has been identified and analysed, there are insights, a design brief is available, a creative process can be started. This can be both in the period when the GEP is being designed, and during implementation of the GEP. Co-creation processes can be used for small problems and for big problems. For bigger challenges, the process to find a solution can be a combination of one or more workshop(s) combined with other techniques. For smaller problems, one single co-creation workshop can cover the full process from idea generation to concept development.

An **example** is a recruitment journey, from preparing the vacancy advertisement to the actual start of the recruited person. A co-creation process can work on the total journey from start to end or can concentrate on one single "touchpoint" (e.g. the interview) together with all the internal and external processes linked to the specific touchpoint. During co-creation workshops, it is important to always look both at the rational part of the experience and at the emotional part: in a recruitment process, the rational part is e.g. how decisions on where to advertise the position are taken; the emotional part will consider the feelings of e.g. both candidate and interviewer before, during and after an interview.

Dimensions for a typology are: (1) whether the co-creation process is used to understand better an issue, or to solve a problem (the latter corresponding most to the co-creation process concept); (2) the duration; (3) the ambition or difficulty of the problem; (4) the number of participants; (5) the profile of participants; (6) the ambition (from low to high); (7) the thematic area or cross-cutting issue.

Co-creation process results should be concrete solutions, ready to be tested. If this cannot be achieved in one co-creation workshop, the process should consist of more activities, to make sure a concrete result is achieved. The fact of having a result is more important than whether this result is really the solution. Having a result, and being able to test it, is important. The test will show the potential, or show why it fails, allowing to go back to the drawing board and find a better solution. This can again be in a new co-creation process, or one additional co-creation workshop, or by a small team. This is up to

the core team to decide.

Before launching a co-creation process, the core team should check whether the conditions are met to make it a success: is the mission for the co-creation process sufficiently clearly formulated? Is it concrete enough to lead to a tangible result and solution? Will it be feasible to recruit the necessary profiles of participants? Will it be possible to test the result?

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The examples below describe co-creation processes that were used by SUPERA partners to co-create GEP Actions with stakeholders.

The **UCM** team designed a participatory process to co-create GEP actions with the participation of the whole UCM community. The workshops consisted of the presentation of a summary of the gender diagnosis/baseline, and the facilitation of a dynamic and co-creative methodology for proposing and designing GEP actions. In a first phase, workshops were conducted with the GE Nodes Network as participants. In a second phase of the process, the GE Nodes Network organised another ten workshops in faculties with the participation of students, administrative staff, and academic and research staff. Based on the results of this process, the SUPERA team consolidated a draft GEP. In a third step, two focus groups and a meeting of the GE Follow-up Commission were held with key actors for the validation and prioritisation of the proposals to be included in the draft GEP.

At CEU, co-creation workshops were organised with members of the academimc, adminsitrative and student body for the design of all the policies approved under the framework of SUPERA. These were not only a source of creative ideas, but also a way to promote a sense of ownership on the side of the participants of the GEP actions.

CES (University of Coimbra), organised a co-creation workshop on prevention of harassment and incident resolution. Participants were a mix of disciplines and profiles, including juridical expertise and decision-maker, but also students, survivors and bystanders. The chart below illustrates the pathway followed during the workshop. The blue blocks are the participatory techniques
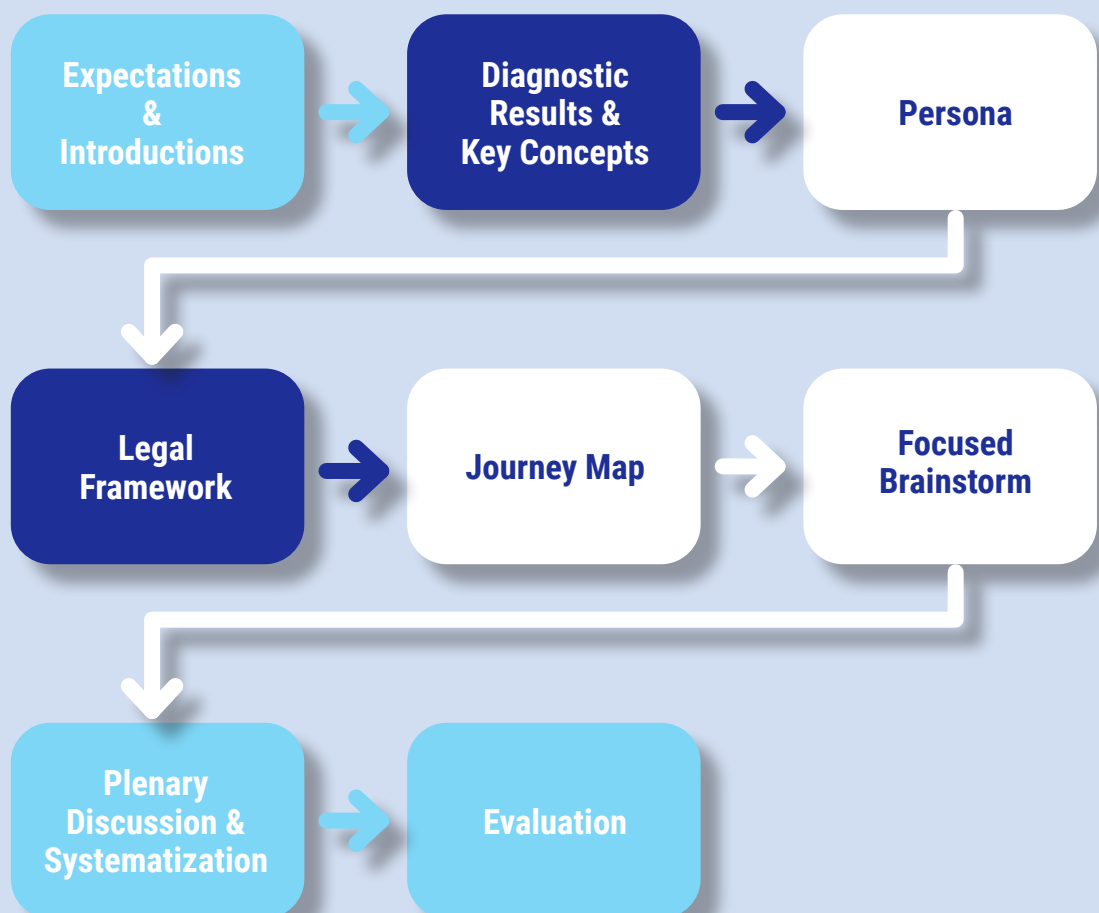
Persona, a technique described below, were prepared by the facilitation team before the workshop. The journey map technique, also described below, was used to identify the "touchpoints" between different actors and each actor's role at each touchpoint.

4.2.2. Preparing a co-creation process

When the conditions are met, the core team can prepare the co-creation process, using Hub members to assist if relevant. Validating the preparation and getting assistance for the recruitment of participants in the co-creation process are in any case good reasons to involve the GE Hub.

For the preparation of a co-creation process, the items listed below are to be defined. These items are valid for a complex process, involving the organisation of multiple workshops, as it is valid for a single co-creation workshop.

Objectives:

The problem as well as the design challenge for the participants should be defined.

For the example mentioned above, the challenge is rather simple: "identify possible improvements for the external recruitment process for research/teaching positions".

The problem and mission for the co-creation process must be very clearly defined, and should not be too ambitious. In the case of an ambitious and complex problem to solve, it is better to split the larger problem into sub-problems and organise various co-design workshops that will together solve the larger problem.

Participants to recruit:

The number of participants is less important than their profile: look for diversity and for creativity. There is no interest in having passive participants. People should have ideas and be ready to express themselves, to play the creative game.

The diversity to be looked for depends on the subject. In the example, staff from HR is to be included, people who usually participate in the assessment, people who were recently hired and therefore experienced the process as a user.

It is not the purpose to be 'representative' as quality is more important than quantity. Nevertheless, it is important to have a good balance in profiles across sex, age and potentially also types of job inside the institution.

It is good to include one or a few participants from outside the institution. Their expertise can be as a user of the type of process/problem analysed, or as an expert of the subject, including on gender equality. It will be the facilitator's role to ensure that experts can act as 'regular' participants and that their expertise is not blocking others to express themselves. It makes good sense, especially in the context of a GEP, to always include one or more gender experts in a co-creation workshop.

As to the number of participants: there is no need for large groups. Six to eight seems to be a minimum to ensure some diversity in the group. Up to 18 can work but gets difficult to manage with only one facilitator. Large groups, like 18 or 24, are okay but only if it is possible to split in sub-groups for the

more creative sessions. This requires facilities that allow to break up into smaller groups (e.g. in a large room where sub-groups can work in the corners). A second condition for larger groups is that there are enough facilitators, or that the exercises can be auto-facilitated (see below).

Duration:

Creative sessions can and should be short, but a co-creation process covers different steps as mentioned above and combines idea generation with other techniques. The solution is therefore to split the process in different workshops, each with a duration of a few hours and up to a minimum, even for rather simple problems, is probably 4 hours or half a day. The group has to go through different steps to be successful: warming up, producing ideas, screening them, getting insights and coming up with solutions. This is possible in a half-day workshop if well managed. If not, one should go for a longer workshop, or split into more workshop. A good approach is to have a first half-day workshop that is concentrating on generating ideas, and a second half-day workshop that works with these ideas to develop concrete solutions. Best is to work with the same group in such a case, to make it a common journey. A reason not to keep workshops and co-creation processes short, is to maintain energy levels high. Eight hours is a maximum, unless the programme allows for a variety of techniques, with more passive and more active sessions for the participants.

Guideline:

The tool for the facilitator of a co-creation workshop is a guideline describing the different steps and activities during the workshop.

A workshop is built up in phases that should each be explained briefly but clearly. The guideline is both an element of briefing for the facilitator and a 'script' during the workshop.

The introduction part is important as this sets the scene: why are we here, who are we (getting to know each other), what are the rules of the game, etc. It is always important to let participants speak and do something as soon as possible. This is to avoid they get in a "passive" mode. Having spoken and/or done something, creates a more "active" mode. It can sometimes be important to make sure all participants have a same level of knowledge. If so, it is better to avoid a lengthy introduction on the subject at the start as this creates a passive mode. Better is to send a brief before, or to build in information sharing after having "warmed up" the group.

The workshop itself should alternate different exercises and techniques, to keep both rhythm and energy. If the work is done in small groups, think in advance how best to split up the group so as to have balanced participation, while avoiding close colleagues being in the same group.

Alternate brainstorming exercises with more conceptual or analytical work (like drafting a journey map – see below).

The guideline should not only include clear instructions on the exercises, but also the type of material

needed: a poster, personas, …, even sticky notes.

It is also important to plan how you will close the workshop. How will you recapitulate? What do you promise participants in terms of feedback? Do not forget to thank all participants for their contributions and time.

Tools and techniques:

Deciding on the right techniques is a key element of success of a co-creation approach. It is also the essence of the content of the guideline for the facilitator.

It is advisable to use as much as possible **posters** for exercises. Posters allow to capture the main results and can be used afterwards as a concrete output of the workshop. They can be hung on the wall, allowing a group to have easy access and share more easily the work. They are a good way to share results of work of small groups in plenary. Again, these posters have to be thought of in advance and be adapted to the exercise at hand. Posters can provide a template for the type of result you expect to get out of the group.

Examples of techniques and the tools associated with them are provided in the next section.

Using posters for physical posters makes the transition to online workshops easier. The same posters can be used on the wall in a meeting room, and on a virtual white board used in online workshops (like Miro or Mural).

Stimulus material:

Creativity can be stimulated with **visual material, examples of (good) practices, trend cards, even Lego® bricks.** This material can help to express feelings, e.g. when making a mood board using pictures selected from magazines, or to get away from the more rational approach, or to help to imagine a story a person could experience.

Personas allow to take some distance from the own experiences and perspectives, to imagine the feelings and experiences of the persona (see below).

Posters have the advantage to be physical outputs produced during the workshop. They are a good tool to capture in a structured way the ideas and thoughts expressed by participants. Their structuring allows for fast analysis and sharing of results, both between sub-groups during the workshop and after the co-creation process is finished. Well designed, a poster can help to stimulate the groups working in the Fab lab.

CES/UC organised an online Fab lab to find innovative solutions for promoting the reconciliation of work/study and life in UC, responding to the lack of work-life (&study-life) balance diagnosed in the SUPERA baseline assessment and to the new challenges arising from the COVID-19 pandemic identified in the COVID-19 survey. The Fab Lab "Conciliation between work/study and personal and family life", was an opportunity for discussion, sharing of experiences and collective exploration of intervention possibilities in order to improve the reconciliation between professional or student life and personal life.

- 23 people participated in the co-creation session, representing the different groups of the UC community (students, operational/administrative/technical staff, professors, researchers, and managers).

Co-creation techniques used: Personas a and lotus blossom

1. In the first step of co-creation, Persona technique was used. In this exercise, participants were divided into 5 working groups and were invited to create 5 personas representing different staff/academic profiles (identified by the SUPERA team beforehand). The collective design of personas enabled the construction of several hypothetical scenarios, meeting the differentiated characteristics and needs of the various profiles of the academic community. The results of this technique allowed analysis of problems and potential solutions from different perspectives and served as a basis for the second participatory exercise.

2. Once the problems of work/life balance and their implications were identified for each Persona, the Lotus Blossom technique was used to generate solutions around the main problems. In the same groups, participants were asked to work on the problems previously identified in order to obtain and operationalize possible solutions.

4.2.3. Tools and techniques to use in a co-creation process

This last section includes standardised descriptions of ten different techniques that have been successfully used by SUPERA partners in co-creation processes. They serve different purposes and have different levels of complexity.

- The Meta-plan approach was used by RAS to develop the GEP with their GE Hub (which included external stakeholders – see above).
- UCM selected a technique inspired on the World Cafés to run the series of more than ten workshops throughout the university to transform results of the initial diagnosis into potential actions for the GEP.

- The set of Personas has been developed by all the core teams together. The exercise aimed at learning how to develop personas. Each team that later used the persona technique developed their own personas (in their own language), linked to the situation of their institution and the theme of the workshop in which they were used. The set of generic personas developed initially is included in appendix 2
- The journey map technique has been applied by different partners to improve recruitment processes.

CES/UC applied the World Cafe technique during a virtual workshop with the Gender Equality Focal Points in the organic units of the University of Coimbra. Aiming at planning the GE measures to implement in the university, participants were divided into small groups and invited to explore questions and issues associated to the operationalization, implementation and sustainability of a number of selected actions. As the session was held in an online format and had a participatory nature, two platforms were used in parallel: one for video/audio - Zoom-, and a collaborative whiteboard platform - MIRO -enabling remote participants to communicate and collaborate across formats and tools. Although the online format turned the session more demanding for facilitators and more challenging for participants who were introduced to new ways of communicating, organising thoughts and documenting ideas, the results more than compensated the efforts in adjusting to a new way of working together. By moving participants around the MIRO room, the conversations at each table were cross-fertilised with ideas from other tables, resulting in the contextualized collective understanding of the implementation process of each gender equality measure under discussion (procedures to adopt, needed resources, actors/entities to involve, ways to assuring continuity, foreseen obstacles and ways of overcoming them, etc.), which was built upon different experiences and institutional backgrounds. Besides being good at generating ideas, sharing knowledge, and exploring action in actual institutional situations, the World Cafe delivered an inclusive and relaxed atmosphere, deeper relationships and mutual collaboration and ownership of the process of institutional change towards gender equality.

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: Journey map

Minimum number of participants:	3
Maximum number of participants:	8

Point of view of the user

Timeline — Before — During — After
(Touchpoints)

Point of view of the institution or service provider
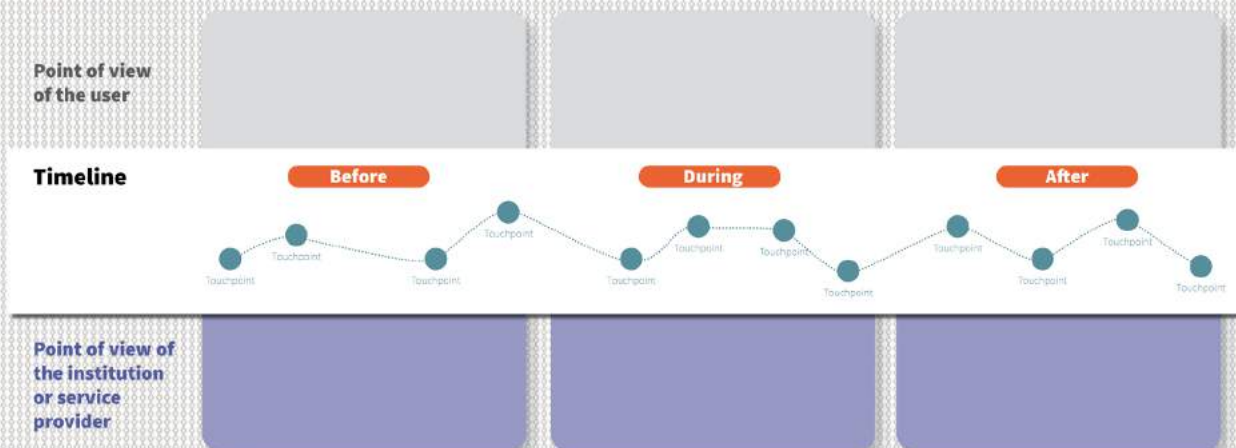
What is a journey map?

A journey map looks at the chronological sequence of an experience from (before) its start till (after) its end. This journey is "mapped" in the sense that it is presented visually on a timeline.

A simple journey map will include the timeline, positioning the "touchpoints" during the journey between the user and the provider; in the example these are the candidate for a recruitment and the institution.

An important element in a journey map is the consideration of the full journey: for a recruitment process, the start might be considered as the moment a candidate reads a job advertisement, but one can ask the following additional questions: who decided on which elements to be covered in the job ad, on how it is formulated and on where the vacancy was published? How did the candidate find the job ad? These questions make it clear that the actual 'journey' starts earlier than at the moment of the first touchpoint.

All steps, and more importantly all the touchpoints, have to be identified. It is at the touchpoints that interaction occurs and that both rational and emotional elements can play a critical role and impact the total experience.

How to make a good journey map?

Journey maps need to be complete and clear. Making the journey map in a participative way will help to achieve this. It also contributes to building a common understanding of what a user goes through.

Journey maps are built up in layers:

1. The basic layer contains a timeline with a positioning of the touchpoints on the timeline.
2. The second level is to explain what happens above and below this line, both in-between the touchpoints and at the touchpoints. What is put above the line is the point of view of the user. What is put below the line is the point of view of the institution or service provider. At the user level, it is important to differentiate the rational and the emotional aspects: near the line, one mentions the activities and objective information. Further up, one can mention the feelings. At the institutional level, the purpose is to identify who (which function) is active and in direct contact with the user at the touchpoint, what this person does, and also what this person is experiencing in terms of feelings.
3. The third level is to identify problems and opportunities on the journey map.

What are journey maps used for?

Journey maps are used throughout the full design process.

They are useful at the start of a process to make sure all steps and dimensions have been considered: has all necessary information on what is actually happening at each touchpoint been identified?

They help to develop insights on problems that occur during the journey.

They can be used as a tool in the design process itself, to find solutions for identified problems, for deciding on removing or adding touchpoints to improve or change the experience.

Journey maps can start as very simple timelines and become very complex during the process as layers of information are added to them. Ultimately, a journey map becomes a blueprint of the service, with details not only of what happens, but also of the underlying processes. They can also include the actions of those persons inside the organisation involved in the "back office", i.e. those that do not have direct contact with the user, but still play a role in the delivery of the service to the user.

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: Persona

Minimum number of participants:	N/A
Maximum number of participants:	N/A

What is a persona ?

Personas are archetypical persons involved in a journey where gender equality can be an issue. These personas are given a name, face, some personal traits, goals and tasks. Personas help to define the target group and to analyse problems and their solution from different user perspectives.

The set of generic personas developed initially is included in appendix 2

How to make a good persona?

Personas can be developed during a workshop and used only for that workshop. This will often be very simple personas, with a picture, a name, and a basic description. Making the persona and using it in the process of the workshop is enough as means to bring the user inside the design process.

But personas can also be developed in detail before the workshop. Many organisations develop a set of personas which will be used as a tool in most of their design processes and workshops. In such a case, they all have a similar structure which can cover different dimensions, from socio-economic, over personality, to attitudes. In SUPERA, it is the ambition to develop a shared set of personas, to have a common tool used by all consortium members. Having such a set does not mean these personas should be used in all Fab Labs. Rather, they are a tool to be used whenever it makes sense. Additional personas might be needed to better fit the situation of an institution, or ad hoc personas can be developed for specific Fab Labs.

Personas should be inspiring and therefore presented in an attractive way. Combining pictures, text and charts is a good practice for presenting personas that will be used as a tool in design processes.

Another characteristic of a good persona is that it is both "real", in the sense that this persona could exist in reality, but also has some "extreme characteristics" that are relevant for the design process. For example, a person's attitude towards innovation when developing a computer application; or a form of impairment (sight, mobility) when developing a travel-related service. In the case of gender equality, defining dimensions that are relevant will be important for the successful use of personas. This will be done in co-creation with SUPERA participants.

Why use personas?

There are different reasons to use personas in a design process. First, it allows participants in a co-design workshop to take some distance from their own experience, by taking the point of view of the persona. Second, it is a way to stimulate the creativity, by imagining how this persona will experience a certain situation or process. Imagining a story helps to open the mind and think out of the box. Third, it is a technique to bring the "user" inside the process in a co-design workshop, as it is often not possible to recruit real users for a workshop. The figure below positions the place and role of personas in the double diamond or design cycle.
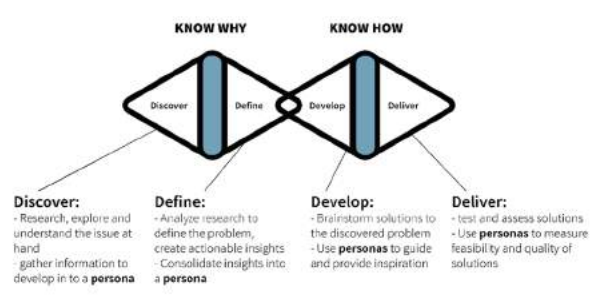
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4.2.3. Tools and techniques to use in a co-creation process

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Name of the technique: **Lotus blossom**

Minimum number of participants:	4
Maximum number of participants:	8

What is a lotus blossom?

Lotus blossom is a brainstorming or idea generation technique. There are various techniques to generate and stimulate ideas. Lotus Blossoms are part of the "multiplier" techniques, using the analogy of flowers which are blossoming.

The advantage of the Lotus blossom is its simplicity, versatility (useful for a brainstorm on any subject) and visual impact through the use of a poster.

How to make a good lotus blossom?

One starts by putting the question or problem at the centre of the poster.

Participants are asked to generate ideas to solve the problem, put them on sticky notes, and the sticky notes are positioned around the central problem, in the first row around it.

When 8 ideas have been found, these ideas are copied in the next layer, put in the centre of the sections. Participants will then search for additional ideas starting from each of the 8 initial ideas, using these as inspiration for additional, related ideas.

The ambition is to fill the poster. The figure below shows an example of how the technique is applied.

The rules for 'good' brainstorming apply to the lotus blossom as well: all ideas are good during the exercise, work with small groups (maximum 6 - people are more creative, and have less inhibitions to express themselves), and keep it short. A lotus blossom can take time to fill, but take into account that people will lose energy quite fast. Brainstorming longer than 30 minutes on one single problem is a maximum.

What are lotus blossoms used for?

As mentioned above, Lotus Blossoms are used to generate ideas or to define a problem in more detail.

They can also be used to find ideas around an ambition, an objective or a problem.

When different small groups have each worked on the same subject, it is good to share results in plenary. Groups react to each other, which can generate new ideas or insights.

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: SWOT analysis

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Minimum number of participants:	3
Maximum number of participants:	8

What is a SWOT analysis?

A SWOT analysis or Strengths-Weaknesses-Opportunities-Threats analysis is a method to analyse the strengths and weaknesses, opportunities and threats. This is an interesting exercise to make at the start of the GEP process, from the point of view of gender equality within your institution, or even departments / faculties. The SWOT analysis serves as a source of inspiration to fine-tune vision and goals, but also to be realistic in the approach to improve the situation (defining the priorities of the GEP).

How to use a SWOT?

Using a poster is recommended. This allows to make the SWOT a collective exercise with participants of a workshop. Sticky notes are best used, as they can be put in a ranking order or cluster, or even moved around. Indeed, an issue can often be considered both as a strength and as a weakness, depending on point of view.

Sticky notes also allow participants to start an individual reflection, then share their first ideas, while the facilitator collects the sticky notes and other participants react (expressing their dis-/agreement, whether they had the same or a similar idea).

Strengths and weaknesses are internal factors that create value or (on the contrary) destroy value. These factors may be resources, knowledge and skills, attitudes, location, internal culture, ways of doing things, etc.

Also consider the opportunities and threats. Those are external factors over which the organization has no control, but which nevertheless affect the organisation. Examples include legislation, trends, the political climate, economic factors, etc.

What to do with a SWOT?

First of all, performing a SWOT as a group helps to set the scene, to create a common understanding among participants. It is a rather long exercise to do (one hour typically), but an effective warming-up of the group before moving to more creative work.

A first level of working with the SWOT is to analyse it as it stands:

- Investigate how identified strengths came about, how to retain them, and how to raise all the departments in the organization to the same strong level.
- Examine the weaknesses and find out how to improve them.
- Although the opportunities and threats might be beyond control, one can still respond to them and use them as a leverage.

The SWOT, when finalised, can also be used as a brainstorming tool to generate ideas for solutions. The technique is to look at the weaknesses and to brainstorm on how they could be transformed into a strength. The same can be done with the threats: how can a threat be transformed into an opportunity?

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: **Cause Diagram**

|	
Minimum number of participants:	3
Maximum number of participants:	8

What is a cause diagram?
A cause diagram is a useful tool for reflecting on the underlying causes of a problem.

How to use a cause diagram?
This tool can be used during a workshop if the cause(s) of a particular problem are not yet clear or if it makes sense if participants discover the cause(s) themselves.

Write down in the inner circle what the problem is. In the example below, the problem relates to careers: why is it hard for a female post-doc to get a tenure track position? Now identify the underlying causes layer by layer. Note down the direct causes in the second circle, the underlying causes in the third circle, and the contributing factors in the fourth circle.

Contributing factors

Indirect causes

Indirect causes

Direct causes

Problem: Getting on a Tenure track
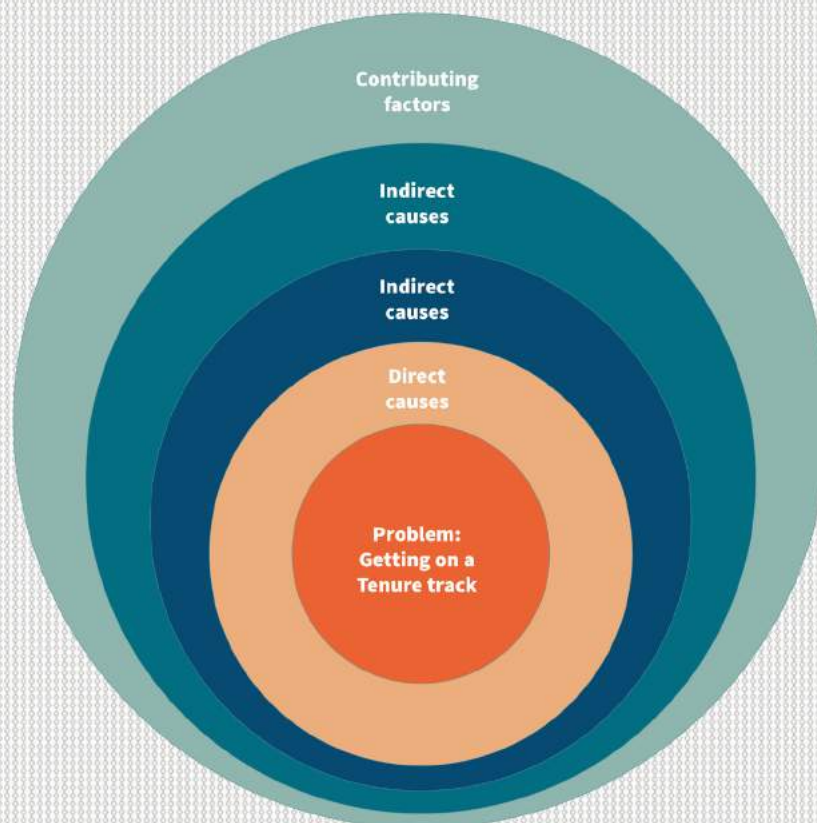
What to do with a cause diagram?
Look at each underlying cause and examine whether it can be changed. An underlying cause can be the (assumed) family care burden (inner circle) with as underlying causes: women are at childbearing age at this point in their career, lack of care facilities, institutional expectations regarding international mobility, men seen as breadwinners, … (second circle).
Start from outside to inside when looking for solutions.

4.2.3. Tools and techniques to use in a co-creation process

**Name of the technique:** **Stakeholder mapping**

Minimum number of participants:	3
Maximum number of participants:	8

What is a stakeholder mapping?

A stakeholder mapping is a tool that allows to visualize not only who are the various stakeholders involved in the gender equality related issues, but also how these relate to each other and to the institution or department / faculty.

How to use a stakeholder mapping?

Use this tool in the first step of the GEP process to make an inventory of and classify the various stakeholders.
Write in the inner circle who are directly involved with the future GEP. In the second circle, the stakeholders are listed who are less directly involved with the service. This may include different teams within the organization, but possibly also external people or organizations. The third circle will identify the stakeholders that are only indirectly involved.
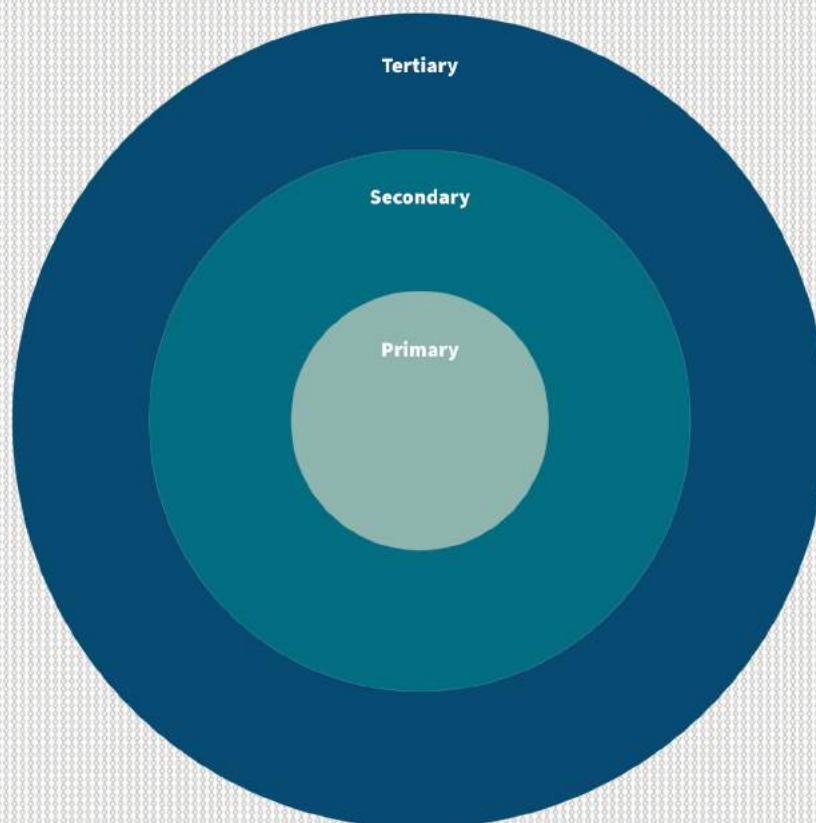
What to do with a stakeholder mapping?

This stakeholder mapping is important as a tool to prepare the setting-up of the GE Hub, and later to identify allies for implementation. Make sure there is a full inventory of all stakeholders involved. Their mapping will help in identifying links between stakeholders. It is therefore best to work with sticky notes so that stakeholders can be moved and clustered.

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: **METAPLAN (for small teams)**

Minimum number of participants: **8**

Maximum number of participants: **40**

Objective of the technique:

Collect opinions from a group of people interested in a specific topic in order to build a common understanding and a good cooperation on some strategic objectives and action plans. The aim is to reach a solution (which implies making a decision)

Specific context requirements:

- A high engagement level by all participants in that specific topic
- A common solution is desirable
- Trust in the benefits of the creative process

Instructions step by step:

1. Introduction: set the scene, give the rationale and rules, clarify the objective
2. Collect individual input on sticky notes and pre-prepared boards/posters
3. Divide into sub-groups by topic of interest
4. The sub-groups discuss topics and highlight the main discussion headlines
5. Share the results in plenary with short presentations by each sub-group
6. Vote to determine priorities using coloured sticky dots (within sub-groups)
7. Sub-groups focus on the prioritised issues in order to create a draft of an action plan
8. Plenary presentation and discussion
9. Conclusion, common action plan

Required materials:

- Cards or sticky notes of various colours
- Display boards
- Markers of different colours
- Pins
- Colored sticky dots for voting
- Sheets or slides containing the rules for voting and communicating in groups
- Rooms with projectors and large, empty walls to be used for showing the results

Advantages:

- Involvement of all the people playing a part in the implementation issues
- Avoidance of messy, long and inconclusive processes and discussions often linked to participative decision-making

Disadvantages:

- Success depends on the moderator's skills
- Some people may be afraid to speak in public
- Voting sessions are public
- Some people may be influenced by what others have already voted
- You have to pay for the license and copyright as well as pass the training

When to use:

- Before reaching a final decision about the action plan needed to deal with a specific problem that is common to all the stakeholders

When not to use:

- When people are not interested in that specific topic
- When the mediators are not expert enough
- When the initial conflict is too hard to gain the will to participate in a process of decision-making

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: **OST — Open Space Technology**

Minimum number of participants:	5
Maximum number of participants:	2000

Objective of the technique:

Create different working groups that are inspired and productive on various issues

Specific context requirements:

- Enough physical space for theatrical production
- No physical space between "actors" and "audience"
- Big room
- Spaces to locate the different groups
- In the room there should be a space to put the different panels created by each group
- In a part of the room, there should be a PC for instant report
- In another part, a table for the coffee break
- Safe environment for sharing personal ideas and experiences

Instructions step by step:

1. The general subject and the four rules are introduced (1. Anybody who comes is the right person; 2. Anything that happens is the only thing that could have happened; 3. When it starts it is the best time; 4. When it finishes it is over)
2. Anyone can propose a theme of the general subject and share it in a short time with the public. Different subjects are proposed
3. Each person chooses a sub-group
4. When one is tired of the discussion or feels he/she does not have any more to contribute, he/she can leave the group and can join another one

Required materials:

- Computers for report
- Food and beverage (permanent coffee break)
- Pens
- Panels
- Cards

Advantages:

- Good when there are conflicts
- It can be used with large groups (5 to 2000)
- People get very creative because they work in the subjects they want to work
- They are free to say what they want with no schemes
- A variety of points of view emerge

Disadvantages:

- If people are rude
- If they are boring
- If they do not contribute to the subject
- The theme remains "empty"
- If they lose focus

When to use:

- A concrete problem
- High complexity of the problem
- Different points of view
- Conflicts
- Necessity to find a solution

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: **Problem Tree**

Minimum number of participants: **3**

Maximum number of participants: **6**

Objective of the technique:

Identify problems and reformulate objectives

Specific context requirements:

- Knowledge about the topic and the institution
- Time (more than one session)
- Diversity or homogeneity depending on the topic

Instructions step by step:

Problem analysis:
1. Identify problems: causes + consequences
2. Establish relationship between causes and problems (consequences)
3. Organize in a tree
4. Transform problems into objectives
5. Set priorities of actions

Required materials:

- Cards (two different colours)
- Tape
- Markers (two different colours)

Advantages:

- The problem can be broken down into manageable pieces
- Better understanding of the problems

Disadvantages:

- Difficulties to see all effects and understand the causes of a problem in a first approach
- Debate can block the reach of solutions

When to use:

- Designing processes of the GEP
- Monitoring the GEP

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4.2.3. Tools and techniques to use in a co-creation process

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Name of the technique: **Theatre of the Oppressed**

| Minimum number of participants: | 2 |
| Maximum number of participants: | 30 |

Objective of the technique:

Make participants aware of the oppressive forces that act upon them, by deconstructing power structures

Specific context requirements:

- Enough physical space for theatrical production
- No physical space between "actors" and "audience"
- Existence of a neutral facilitator
- Safe environment for sharing personal ideas and experiences

Instructions step by step:

A member of the audience shares a personal or closely related experience that has a negative impact in his/her life, or:
- The facilitator divides the groups into sub-groups and they list the daily conflicts they consider the most disruptive. They share the list in plenary
- Each sub-group selects a conflict and they prepare a narrative that reflects their selected conflict. The scene is presented in front of the audience, who can stop it whenever they want to include modifications
- The audience's suggestions should include potential solutions to the conflict, which are to be dramatised by actors

Required materials:

- Imagination
- Pens and paper
- Prompts related to the problem
- Music/sound system

Advantages:

- Increases solidarity and awareness
- Fosters empowerment
- Creates empathy towards the oppressed
- Encourages creative solutions

Disadvantages:

- Participants with no theatrical experience may be reluctant to enact their scene

When to use:

- Interpersonal conflict. Eg. harassment, gender bias in the classroom

4.2.3. Tools and techniques to use in a co-creation process

Name of the technique: **World Café**

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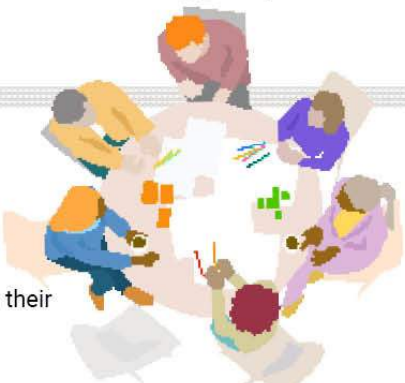| Minimum number of participants: | 20/25 |
| Maximum number of participants: | NA |

Objective of the technique:

Identify innovative strategies for social change

Specific context requirements:

- Welcoming environment
- Strategies to avoid endless discussions among participants at the tables

Instructions step by step:

1. Give a name to the theme indicative of the topic
2. Choose a cosy and informal venue
3. Define one single question or one per table (5-6 tables)
4. One host person per table that encourages participants to express their ideas through drawings, key-words, sentences
5. Each turn has a certain duration: 20-30 minutes
6. New turn: different starting point
7. After visiting each table, participants return to their starting tables and synthesise the findings
8. Group discussion on the most important ideas from each table

Required materials:

- Small round tables and chairs
- Large sheets of paper and markers, pencils, and sticky notes of different colours

Advantages:

- Easily applicable in communities or organisations
- Facilitates an in-depth look into the theme to find more diversified solutions

Disadvantages:

- It is difficult to mobilise people
- Hosts, at each table, should have facilitation and skills

When to use:

- Co-production of knowledge about a problem or a community and the search for solutions

REFERENCES

REFERENCES

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https://www.designcouncil.org.uk/news-opinion/design-process-what-double-diamond

Design toolkits:

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  http://www.designkit.org/methods
- Service design: downloads for templates and posters corresponding to techniques:
  http://www.servicedesigntoolkit.org/downloads.html
- Design Thinking for Educators: explanations and freely downloadable toolkit:
  https://designthinkingforeducators.com/
- Service Design Tools, communication methods supporting design processes:
  http://www.servicedesigntools.org/
- Toolkit from ACT project: https://geincee.act-on-gender.eu/tools/toolkits

Change management models:

- An overview of 8 change management models, with references:
  https://www.process.st/change-management-models/
- An overview of 6 change management models:
  https://tallyfy.com/change-management-models/

APPENDIX

Examples of personas

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YELLOW WINDOW

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Appendix. Examples of personas

ADRIANA — RECRUITMENT / SELECTION / PROMOTION / CAREER MANAGEMENT

AGE: 23 **GENDER:** Female
SCIENTIFIC FIELD: Gender Studies
Gender Studies Expert (MA). Lisbon, PT. Single.

Adriana recently moved from Brazil to Portugal following the completion of her Master's degree. She relocated with the intention of pursuing a doctorate and is currently seeking a position as a Ph.D. canidate and Research Assistant at the Universidade de Lisboa. In addition to her studies, Adriana is a feminist activist and is an active member of several gender equality organizations.

"I applied for 3 grants in research projects and was rejected after the interviews with female recruiters."

"I learned that speaking up my mind does not help with getting a job, or perhaps it's just my accent."

GOALS & MOTIVATIONS
- To get her Ph.D.
- To continue to improve conditions for women, both in the workplace and elsewhere
- To assimilate into the Portuguese culture while maintaining her Brazilian identity
- To increase her political activism

FRUSTRATIONS
- Cultural differences seem to be hindering her pursuit of a position
- Feels that being both a woman and Brazilian puts her at a significant disadvantage
- Despite her impressive grades and extracurriculars, she's having trouble finding a place at the university

PERSONALITY
Introvert — Extrovert
Observant — Intuitive
Thinking — Feeling
Judging — Prospecting
Thinker — Doer

ATTITUDE TOWARDS GE
Resistance — Support
Passive — Active

Additional notes:
Though her immediate family remained in Brazil, Adriana has an aunt and uncle who live in nearby in case of need.

PRIORITIES
Career — Work-life balance
Do it alone — Do it together

ATTITUDES
Health conscious: Low — High
Low — High

ALEXANDRA — RECRUITMENT / SELECTION / PROMOTION / CAREER MANAGEMENT

AGE: 48 **GENDER:** Female
SCIENTIFIC FIELD: Not applicable
Technical staff. Cologne, DE. Recently divorced.

Alexandra is a recently-divorced mother of two who has held the same position for the last ten years. Not only is she a single mother, but her responsibilities also include the care of her own mother who lives in eastern Germany. Her financial situation is a constant source of stress, especially now that both of her children would like to apply for Erasmus in Sweden. Her desire is to improve both her personal and professional situation in order to gain more stability and meaning.

"I feel stuck."

"I need a change in my life."

"I'm ready to break away from the monotony of routine."

GOALS & MOTIVATIONS
- To improve profressionally
- To obtain a more challenging position with greater responsibilities
- To work in a collaborative environment
- To encourage her kids' enthusiasm towards their education
- To start dating again

FRUSTRATIONS
- Her aging mother living in eastern Germany with health issues
- Financial uncertainties while caring for two children
- Limited personal time for social activities
- Romantic relationships are difficult with two grown children

PERSONALITY
Introvert — Extrovert
Observant — Intuitive
Thinking — Feeling
Judging — Prospecting
Thinker — Doer

ATTITUDE TOWARDS GE
Resistance — Support
Passive — Active

Additional notes:
Since her children are adults and relatively independent, she would welcome the change of relocating to a new city.

PRIORITIES
Career — Work-life balance
Do it alone — Do it together

ATTITUDES
Health conscious: Low — High
Low — High

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CARLOS

GENDER-BASED VIOLENCE / HARRASSMENT

AGE: 32 **GENDER:** Male

SCIENTIFIC FIELD: Medicine

Assistant Professor at Univ. of Barcelona, ES. Married.

Carlos is a young Medical professor at the University of Barcelona. His attitude frequently comes into question as his relationship with his students is very informal. In his spare time, he is very active and spends a lot of time on fitness and outdoors.

"I meet my students in a bar because it is a less stressful environment."

"XXI century women do not understand compliments."
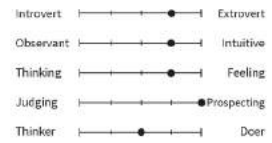
"I never ever exchanged marks for favours."

GOALS & MOTIVATIONS

- He has academic ambitions and looks for visibility in his institution
- To provide a good education for his kids
- To fulfill his responsibilities as a husband and father (he describes himself as a family man)
- To support and encourage his students

FRUSTRATIONS

- His integrity is questioned simply because he does not teach using traditional methods
- Feels judgment from his peers
- Has been accused before the inequality unit of inappropriate behavior

PERSONALITY

Introvert —————●——— Extrovert
Observant ————●———— Intuitive
Thinking ———●————— Feeling
Judging —————————●Prospecting
Thinker ———●————— Doer

ATTITUDE TOWARDS GE

Resistance —●————— Support
Passive —●————— Active

Additional notes:
Carlos is very transparent about his methods and beliefs. He feels he has nothing to hide. While he believes the medical profession is open to both genders, some specialisations fit men better (e.g. surgeon).

Feeling of comfort around peers
Low ————●———— High

Feeling of comfort around superiors
Low —————●——— High

Feeling of safety on the institution's premises
Low ——————————● High

Willingness to change attitude
Low —————————— High

ESTEFANIA

GENDER-BASED VIOLENCE / HARRASSMENT

AGE: 26 **GENDER:** Female

SCIENTIFIC FIELD: Political Sciences

Ph.D. Candidate. Madrid, ES. Divorced.

Estefania is a young mother and a recent expat from Havana, Cuba. She relocated permanently to Madrid and is currently in her first year of her Ph.D. Outside of school, most of her time is devoted to caring for her two-year-old daughter. In her limited free time, she enjoys dancing and playing the cello.

"The future of my child is my top priority"

"My female colleagues perceive me as self-objectifying"

"I can be persistent"

GOALS & MOTIVATIONS

- To be a role model for her child
- To provide a fruitful future for her child
- To graduate with honors
- To obtain a permanent position at Complutense
- To maintain a productive parenting relationship with her ex-husband, despite their differences

FRUSTRATIONS

- Ex-husband did not want her to keep studying
- 80% of her superiors are male
- Feels underestimated because of her migrant background
- Does not feel safe addressing her concerns

PERSONALITY

Introvert ————●——— Extrovert
Observant ————●——— Intuitive
Thinking ———●———— Feeling
Judging —————●—— Prospecting
Thinker ———●———— Doer

ATTITUDE TOWARDS GE

Resistance ————●—— Support
Passive ———●——— Active
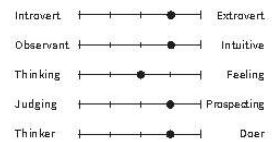
Additional notes:
She was awarded a scholarship for her studies and has additional financial support from her family.

Feeling of comfort around peers
Low —●———————— High

Feeling of comfort around superiors
Low ——●——————— High

Feeling of safety on the institution's premises
Low ————●———— High

Willingness to change attitude
Low —————●—— High

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FABRIZIO

RECRUITMENT / SELECTION / PROMOTION / CAREER MANAGEMENT

AGE: 45 **GENDER:** Male
SCIENTIFIC FIELD: English Literature
Senior lecturer. Bologna, IT. Married.

Fabrizio is the main care-giver for a family of four. Though he is married, his wife travels a lot, so he assumes a lot of domestic responsibility for his 13-year-old daughter and 8-year-old son. Professionally, he has ambitions to obtain a permanent position as an English professor. Outside of academia and the home, he enjoys going to the theater.

"I feel I'm not doing enough in any field of my life."

"My colleagues are almost all female and they ask me to join every committee because they don't see me as a care-giver."

GOALS & MOTIVATIONS
- To become a full professor
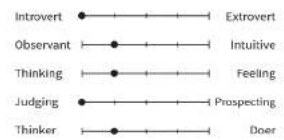- To excel in his career in academia
- To be the best father he can be
- To not only maintain but feel as though he's been successful in all of his endeavors, both personal and professional
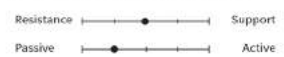
FRUSTRATIONS
- Being the only male in a predominantly female field
- Constantly trying to balance work-life obligations
- Having a traveling spouse puts a strain on the relationship
- Limited personal time for social activities
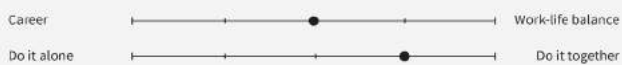
PERSONALITY

Introvert		Extrovert
Observant		Intuitive
Thinking		Feeling
Judging		Prospecting
Thinker		Doer

ATTITUDE TOWARDS GE

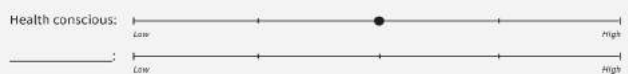|		
Resistance		Support
Passive		Active

Additional notes:
Fabrizio has been patiently waiting to become a full professor, however he hasn't been vocal to his superiors about his career goals.

PRIORITIES

Career		Work-life balance
Do it alone		Do it together

ATTITUDES

Health conscious: Low — High

Low — High

HAN CHANG

RECRUITMENT / SELECTION / PROMOTION / CAREER MANAGEMENT

AGE: 35 **GENDER:** Male
SCIENTIFIC FIELD: Mathematics
Senior lecturer. Lisbon, PT. Single.

Han Chang was born in Portugal to first-generation immigrants from China. Because of his Asian looks, he always felt like a foreigner in his own country. He has one son and shares custody with the child's mother. His ex-partner also works at the university, and she recently got a promotion that he felt he was better suited for.

"I'm totally for equality policies, but in my case I suffered discrimination, as I have the same merits as my female colleagues."

"I got my Ph. D here and have always given my best to this department. I deserved that position."

GOALS & MOTIVATIONS
- Academic excellence and recognition
- To participate in an exchange program with China to learn more about his culture of origin
- To dedicate time to be with his son and prioritize his needs

FRUSTRATIONS
- Struggles with his cultural identity
- His ex-partner was able to dedicate more time toward advancing her career while he was taking care of their child
- Their CV's are similar, however he feels that her profile was preferred because she is a woman

PERSONALITY

Introvert		Extrovert
Observant		Intuitive
Thinking		Feeling
Judging		Prospecting
Thinker		Doer

ATTITUDE TOWARDS GE

Resistance		Support
Passive		Active
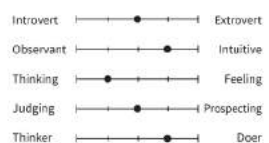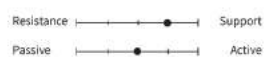
Additional notes:
His faculty has adopted a positive treatment policy in STEM, which he feels gave his ex-partner an advantage in the hiring process.

PRIORITIES

Career		Work-life balance
Do it alone		Do it together

ATTITUDES

Health conscious: Low — High

Low — High

JASMINE — RECRUITMENT / SELECTION / PROMOTION / CAREER MANAGEMENT

AGE: 40 **GENDER:** Female
SCIENTIFIC FIELD: Not applicable
Librarian. Budapest, HU. Divorced.

Jasmine is Hungarian by nationality but is a member of the Roma community. She works at the university library. She has a 13-year-old daughter and a son of 20 who studies abroad. She is a single parent.

"I love my job. The only inconvenience is that I cannot work from home."

"Sometimes I feel guilty towards my children, but I hope that one day they will realise that I did what I could to give them a better life"

GOALS & MOTIVATIONS
- To meet new people of various backgrounds
- To provide a good education and promising future to her children
- To maintain her relationship with her relatives back in Hungary
- To continue to pursue her interest in culture and history, with or without formal education
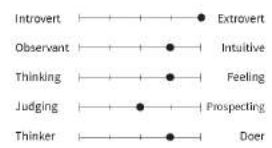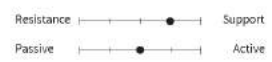
FRUSTRATIONS
- Fears that she does not spend enough time with her kids
- Struggles to give her children the best that she can, however she fears it's not enough
- Because she's a single mother, she often had to make personal and professional sacrifices

PERSONALITY
Introvert —————●—— Extrovert
Observant ————●——— Intuitive
Thinking ————●——— Feeling
Judging ——●———— Prospecting
Thinker ————●——— Doer

ATTITUDE TOWARDS GE
Resistance ————●—— Support
Passive ———●———— Active

Additional notes:
Throughout her education, Jasmine was a top student. Given the chance, she would like to keep studying to pursue a career in academia

PRIORITIES
Career ————●———— Work-life balance
Do it alone —————————● Do it together

ATTITUDES
Health conscious: Low ————————————●— High
: Low ———————————— High

JUSTINO — GENDER-BASED VIOLENCE / HARRASSMENT

AGE: 19 **GENDER:** Male
SCIENTIFIC FIELD: Engineering
Undergraduate student. Turin, IT. Single.

Justino grew up in a rural area and recently moved to Turin to study at the university. This is his first experience living independently, away from his family. He is not only struggling to adjust, but is also facing harrassment and discrimination because of his homosexuality. His identity and his course load have made it difficult to make many friends on campus, and he is therefore unsure who to turn to for help.

"I think I'm getting depressed because I have no life outside of studying."

"Coming here was my dream, but I don't feel that I belong in this environment."

"I have no idea where to go for help."

GOALS & MOTIVATIONS
- To make new friends and integrate into campus life
- To find a welcoming group to play football with
- To obtain a Master's Degree
- To move abroad

FRUSTRATIONS
- Suffers harrassment on campus because of his homosexuality
- Has once received a threatening note
- Has voiced his concerns regarding his safety on campus, but no action has been taken
- Does not feel that his safety and well-being are taken seriously by the faculty

PERSONALITY
Introvert —●———— Extrovert
Observant —●———— Intuitive
Thinking ——●——— Feeling
Judging ————●—— Prospecting
Thinker —●———— Doer

ATTITUDE TOWARDS GE
Resistance ————●—— Support
Passive ——●——— Active
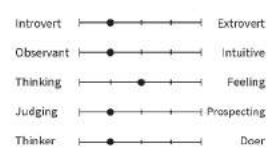
Additional notes:
Justino needs to maintain high scores to fulfill his scholarship requirements. Without it, he could not afford to continue his studies.

Feeling of comfort around peers: Low ●———— High
Feeling of comfort around superiors: Low ——●—— High
Feeling of safety on the institution's premises: Low ——●—— High
Willingness to change attitude: Low ————●— High

LORENZO

RECRUITMENT / SELECTION / PROMOTION / CAREER MANAGEMENT

AGE: 27 **GENDER:** Male

SCIENTIFIC FIELD: Engineering

Ph.D. Candidate & Teaching Assistant. Turin, IT. Single.

Lorenzo is the main caretaker in his family. His single mother suffers a chronic condition and needs constant care. He therefore is unable to participate in networking opportunities and other extracurriculars. He struggles to balance all of his responsibilities but is dedicated to fulfilling both personal and professional roles.

"It's a constant struggle between personal and professional."

"A part-time position would tremendously ease my burden."
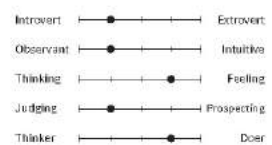
"I'm always asked: don't you have a sister?"

GOALS & MOTIVATIONS

- To become a university professor
- To travel more
- To have a family of his own
- To work in a flexible environment that does not force him to choose
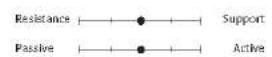- To devote proper time and attention to his mother

FRUSTRATIONS

- Faced problems within in his department when he requested a part-time contract
- Unable to choose his own teaching hours
- Social activities / extracurriculars are beyond his capacity
- Rarely has time to himself
- Always racing against the clock

PERSONALITY

Introvert	●————	Extrovert
Observant	●————	Intuitive
Thinking	————●—	Feeling
Judging	●————	Prospecting
Thinker	———●—	Doer

ATTITUDE TOWARDS GE

| Resistance | ———●—— | Support |
| Passive | ———●—— | Active |

Additional notes:
Though Lorenzo has extended family nearby, they're often too busy or too detached to help with the care of his mother.

PRIORITIES

Career ————————●———— Work-life balance

Do it alone ———●————— Do it together

ATTITUDES

Health conscious: ————●——————
Low — High

————●—————
Low — High

PIERRE

LEADERSHIP / DECISION-MAKING

AGE: 40 **GENDER:** Male

SCIENTIFIC FIELD: Social Sciences

Associate Professor (perm.). Paris, FR. Married.

Pierre is an EU citizen with parents with a migrant background. He is a father of three as well as an activist for a refugee NGO with an intersectional approach to inequalities. He is the Trade Union representative and actively pushes the diversity management plan. He is very vocal about his disagreement with prioritizing GE.

"Some colleagues perceive me only as trouble-maker, not as a serious academic"

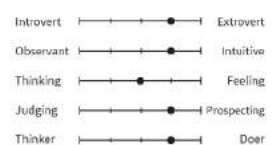*"My political involvement is very time-consuming, but I'm committed to creating a more equal society."*

GOALS & MOTIVATIONS

- To be Dean of Social Sciences school
- To be a role model for other academics with migrant origin
- To maintain time for his family
- To instill cultural pride in his daughters
- To provide a brighter future for them

FRUSTRATIONS

- Only black person in his department
- Often overlooked
- Frequently feels as though he's not being taken seriously
- Struggles to push verbal supporters towards active involvement and practices
- Sees daughters shying away from traditions

PERSONALITY

Introvert	————●—	Extrovert
Observant	————●—	Intuitive
Thinking	——●——	Feeling
Judging	————●—	Prospecting
Thinker	————●—	Doer

ATTITUDE TOWARDS GE

| Resistance | ————●— | Support |
| Passive | ———●— | Active |

Additional notes:
Willing to sacrifice his career goals but not his family for the sake of career progression.

Strength of network: ——●————————
Low — High

Diplomacy: ———●————————
Frank — Tactful

Power (politics): ——————————●—
Independent / autocratic — Inclusive (democratic / communicative)

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RAFFAELLA

LEADERSHIP / DECISION-MAKING

AGE: 55 **GENDER:** Transgender female
Regional Authority Deptmt.
General Director. Milan, IT. Married.

Raffaella is a transgender woman who has spent much of her career in her current position. Despite her long and strong track record, she feels that her authority has been challenged since her recent sex change. Despite her professional challenges, she feels the change has significantly improved her quality of life. She remained married her partner, and they have three children together. They enjoy taking family trips whenever possible.

"Since I underwent my change, I feel that I lost some respect of peers and subordinates."

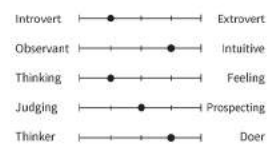*"I discovered trust and authority should not be taken for granted."*

GOALS & MOTIVATIONS

- To regain her previous status and authority
- To regain recognition for the work she published as a man
- To be considerate to her family as they adapt to this change with her
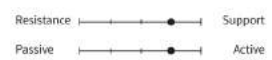- To connect with other transgender professionals

FRUSTRATIONS

- Her sex change affected her professional status and relationships
- Hesitates to trust those that were previously close to her
- Feels that her subordinates are unsure about how to address her
- Feels guilty/self conscious of the way her change has affected her children

PERSONALITY

Introvert	— ● —	Extrovert
Observant	— ● —	Intuitive
Thinking	● —	Feeling
Judging	— ●	Prospecting
Thinker	— ● —	Doer

ATTITUDE TOWARDS GE

| Resistance | — ● — | Support |
| Passive | — ● — | Active |

Additional notes:
Despite some hardship, Raffaella feels strongly that her sex change was the right choice for her sense of identity and confidence.

Strength of network:
Low — ● — High

Diplomacy:
Frank — ● — Tactful

Power (politics):
Independent / autocratic — ● — Inclusive (democratic / communicative)

SOFIA

LEADERSHIP / DECISION-MAKING

AGE: 48 **GENDER:** Female
SCIENTIFIC FIELD: Mathematics
Professor. Stockholm, SE. Married.

Sofia is a long-time Maths professor at the University of Stockholm. She grew up around the university, as her father was the former dean. In addition, her partner is also a colleague. She has dedicated her life to her research and academic ambitions, and therefore never had any interest in having kids of her own.

"My colleagues do not intellectually respect me as much as the other male professors."

"I very much contribute to my university but my engagement is not recognized."

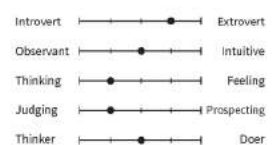*"I'm not just my father's daughter."*

GOALS & MOTIVATIONS

- To remain active in research and continue publishing new work
- To receive recognition for her own merits, rather than being associated with her father or current partner
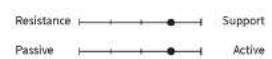- To one day become the dean herself

FRUSTRATIONS

- Feels that her academic excellence is overlooked because of the success of the men she is associated with
- Is concerned that people assume that she did not earn her current title, but rather was given her position because of her father's influence
- Feels very competitive with her partner

PERSONALITY

Introvert	— ● —	Extrovert
Observant	— ● —	Intuitive
Thinking	— ● —	Feeling
Judging	— ●	Prospecting
Thinker	— ● —	Doer

ATTITUDE TOWARDS GE

| Resistance | — ● — | Support |
| Passive | — ● — | Active |

Additional notes:
Has some reservations about all sorts of measures to accommodate working mothers.

Strength of network:
Low — ● — High

Diplomacy:
Frank — ● — Tactful

Power (politics):
Independent / autocratic — ● — Inclusive (democratic / communicative)