Gender Equality in Academia and Research

Step 2: Analysing and assessing the status quo in your organisation

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The best starting point for developing an effective set of measures is to have a thorough understanding of how your organisation is currently doing regarding the status quo of gender equality. After assessing the status quo of your organisation, you will have an overview of its strengths and weaknesses concerning gender equality. Based on these results you will be able to develop clear objectives and a set of targeted measures for your gender equality plan (GEP) (step 3).

Before going deeper into this subject, it is worth mentioning that the status quo assessment is also sometimes referred to as the baseline or initial assessment. Know that all of these terms are used for the initial analysis that helps you understand the status quo in your organisation and that can be used as a baseline to assess the impact of your measures.

The comprehensiveness of this initial analysis will depend on the resources available. Make sure to assess the human and financial resources that you have access to in order to undertake this task. Identify internal assets (e.g. gender experts), but consider other possible external resources as well (e.g. funding, local partnerships), as suggested in step 1 ('Find support').

Below you can find the main aspects that you need to consider in order to analyse and assess the gender equality status quo in your organisation. Some details on how to conduct the analysis are also provided. However, the specific methodological approach needs to be developed based on the available human and financial resources, and the technical capacities of and available competences in your team, as well as the context of your organisation. Consider also the five levels for an effective GEP (context, structure, personnel, power and culture) in your status quo assessment.

Decide who will carry out the analysis

When deciding who should be involved in performing the analysis, consider the following.

If the structure of your organisation includes a **person or body responsible for supporting gender equality** (e.g. gender equality office/unit), this person or body could take on the task of performing the initial assessment regarding gender equality in your organisation. You can also involve (appointed) representatives of staff or workers' council members. Do not forget to involve gender experts working in the organisation. They can provide valuable insights and/or be involved in this task.

If such a person or body does not exist, or if they/it cannot take on this task, consider **putting together a small team** to undertake this baseline assessment. The team can be composed of members of the gender equality structure, the teaching and/or research staff, and the human resources department.

Note that the **tasks of each team member** need to be agreed upon and made clear from the very beginning. You may also want to consider who is involved in a GEP. Needless to say, the available resources need to be considered when deciding on how many personnel to involve in this process.

In any case, having an **explicit mandate from top management** to undertake a baseline assessment is essential for dedicating time, opening doors and obtaining cooperation.

Review relevant legislation and policies in your country

It is useful to know the general legislation and policies regarding gender equality and non-discrimination, as well as those that are specific to the fields of research and innovation (R & I). This will allow you to focus your status quo assessment on the relevant legal and policy requirements. It will also back up your rationale to support your measures. You may have already gathered some of this information in order to understand the context of your organisation (see step 1). This knowledge can also support some of the measures of the GEP you will set up.

You should consider the following **regulatory frameworks**:

regulations at **EU level** and how they were adopted into the national law of your country;
existing laws and policies related to the integration of gender equality into research and

higher education **in your country** and **at subnational (regional) level**.

What to look for when reviewing the policies.

Are there targets with respect to gender equality set at the policy level? What are they?

You can use these targets for orientation / as a starting point, and also in your argumentation for implementing measures (e.g. to convince senior management). You can also use these targets to decide which data you need to analyse.

Are there funding opportunities for implementing gender equality measures?

Consider also whether there are funds for collecting data.

Are there initiatives in your country in response to these targets or otherwise focusing on gender equality?

Is it possible that your organisation could join an existing initiative?

Note that **in order to be eligible for Horizon Europe**, 'it is mandatory that organisations collect and publish disaggregated data on the sex and/or gender of personnel (and students, where relevant) and carry out annual reporting based on indicators' (see *Horizon Europe Guidance on Gender Equality Plans* ⧉, pp. 23−27).

Identify existing measures promoting gender equality

To start assessing the status quo at your organisation, take a look at existing gender equality measures within your organisation. For this purpose, take the following steps:

map the existing internal measures to promote women to sensitise about gender equality, to enhance work−life balance, etc.:

for this purpose, you can use the gender audit questionnaire ⧉provided by the EU-funded project 'Systemic action for gender equality' (SAGE) as a base for your mapping;

assess the implementation and results of these existing measures critically, together with those involved, considering how their effectiveness can be enhanced.

If you need inspiration to conduct your own mapping, take a look at the analysis report ⧉ produced by the GENDER-NET project.

Decide on the indicators you want to focus on

As you may have already guessed, data broken down by sex is needed to detect any gender differences. Analysing such data will provide crucial information for identifying the most pressing areas that require intervention. For example, if your analysis reveals that the gender balance is particularly distorted in certain disciplines, efforts may be directed to these areas.

The **key indicators** you should consider are as follows:

staff numbers by gender at all levels, by disciplines, by function (including administrative/support staff) and by contractual relation to the organisation;
average numbers of years needed for women and for men to make career advancements (per grade);
wage gaps by gender and job;
numbers of women and men in academic and administrative decision-making positions (e.g. boards, committees, juries);
numbers of women and men candidates applying for distinct job positions;
numbers of women and men having left the organisation in the preceding years, specifying the numbers of years spent in the organisation;
number of staff by gender applying for / taking parental leave, for how long they took leave and how many returned after taking the leave;
numbers of absence days taken by women and by men, differentiated by absence motive (sick leave, care leave, etc.);
numbers of training hours/credits attended/received by women and by men;
numbers of women and men students at all levels and for all disciplines, and academic and employment outcomes;
shares of women and men among employed researchers;
shares of women and men among applicants to research positions, among people recruited and success rate, including by scientific field, academic position and contract status;
shares of women and men on recruitment or promotion boards and as heads of recruitment or promotion boards, and shares of women and men in decision-making bodies, including by scientific field.

Of course, this list is not exhaustive and you may want to consider additional quantitative or qualitative indicators based on your individual situation. You may, for instance, want to collect data and carry out an analysis that integrates **other dimensions** besides sex, such as age, race and ethnicity, disability, sexual orientation, and religion. It is important to understand the intersections between sex/gender and other dimensions, as multiple discrimination can occur and needs to be tackled. However, be mindful of data protection issues when staff numbers with particular intersectionalities are very small, leading to data linking and disclosure issues (e.g. if there is only one black, lesbian, disabled woman on staff).

Collect sex-disaggregated data about staff and students

As a first step, check **which data is available** from the human resources department or another entity within your organisation. Note that the data might not be available in the way that you need it, so you might have to let them know exactly what you need and give them enough time to prepare it. It might be helpful to provide them with a list (e.g. an Excel sheet) or questionnaire, where they can insert the data directly.

However, most likely, you will need to collect additional data yourself. A standard way to collect additional data is by conducting a survey: For this purpose, the gender equality audit and monitoring (GEAM) tool ⧉ (developed by the ACT project) provides some sample questionnaires and individual questions that can be adapted and used for your case. The GEAM manual ⧉ provides guidance on how to prepare and distribute a LimeSurvey questionnaire, and which issues (such as data protection) you need to consider.

Here are some specific ideas on **how to collect additional data**.

Conduct a **survey among staff members** to assess the working culture and climate in your organisation, the knowledge and experiences of gender (in)equality in the organisation, organisational practices promoting gender equality, sexist attitudes and behaviours, etc. This will give you a better understanding of the status quo in your organisation and which topics you need to address. You might want to use the GEAM survey ⧉ for this purpose.

Conduct **interviews or group discussions** with representatives of all levels of staff and/or covering different disciplines. The interviews can cover some of the aspects mentioned above, but can also probe staff perceptions about the need for and level of acceptance of gender equality measures. Including these groups can also help to make your project and ambitions more visible and to gather support.

Review your communication materials and analyse the messages your organisation communicates internally and externally and how they represent gender equality, diversity and inclusion.

Note that these are merely suggestions and that the extent of your status quo assessment highly depends on the resources available to you. Consider that it is important not to spend too much time collecting and analysing data, but that efforts are needed in order to design a GEP that is appropriate for your organisation. Furthermore, considering that you will need to collect this data annually as part of your GEP monitoring process, you should try to **standardise your process** from the beginning. Remember that implementing gender equality is a circular process.

For additional inspiration and guidance on how to collect the relevant data, see the resources provided in the **tab 'Tools and resources'**.

Analyse the data collected

Once you have collected all the relevant data, start by producing **descriptive statistics** (absolute and relative frequencies, etc.) and take a look at the results. At the end, you need to **assess what the numbers mean** for your plan to implement gender equality measures.

In order to support this assessment, you should compare the performance of your organisation (with respect to the indicators you analysed) with similar organisations in your country or with country- or EU-level data. To do so, you may want to look at the most recent *She Figures* ⬈ (2021), the main source of pan-European, comparable statistics on the state of gender equality in R & I. Another useful source is the gender statistics database of the European Institute for Gender Equality (EIGE).

Again, consider the **context of your organisation**: do you operate in an area with a traditionally lower share of women (e.g. in science, technology, engineering, mathematics (STEM) subjects)? Interpret the results accordingly and consider any targets for gender equality that you may have identified before.

Based on this assessment, you will be able to identify the key areas of intervention for your GEP. How to do this is described in step 3.

Remember that in order to be eligible for **Horizon Europe**, the data needs to be **collected and published annually**, so think ahead and plan your **monitoring and evaluation process** now (see step 5 for more details).

In order to view **videos and webinars** or further **tools and resources** on the topics discussed in step 2, switch between the respective tabs. Otherwise, click below to continue to the next step and learn how to **set up your GEP**. You can also go back to the previous step.