

D7.1

Checklist and instructions for gender training needs assessment

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Information in this report that may influence other GEARING-ROLES tasks

Linked Task	Points of Relevance
Task 6.1 Appointment of a gender task force / structure in all GEARING-Roles partners	The present deliverable can be used as an aid to identify possible task force members based on their knowledge / skills / attitudes

GEARING-ROLES project

GEARING-Roles is a four-year (January 2019 – December 2022) Coordination and Support Action project that brings together a pan-European group of academics and industry professionals to collaborate and exchange knowledge, good practices, and lessons learned on designing, implementing, and evaluating 6 Gender Equality Plans (GEPs). The project therefore has a firm objective of challenging and transforming gender roles and identities linked to professional careers and working towards real institutional change. This multidisciplinary, multinational, and multi-sectorial collaboration will be supported by training, mentoring activities, awareness raising campaigns as well as bi-annual videos and podcasts and annual networking events.





Table of Contents

GEARING-ROLES project	1
List of Abbreviations.....	2
Acknowledgements	2
Executive Summary	3
1. Introduction.....	4
2. Purpose of the self-assessment tool.....	4
2.1 Framework for the self-assessment.....	4
2.2 Scope of the self-assessment.....	5
2.3 Definition of target groups.....	5
3. Structure of the self-assessment tool	7
4. Instructions for use	10
4.1 How to answer the different parts of the tool?.....	10
4.2 Methodological approach to the self-assessment.....	11
5. Practical aspects and timeline for submission	12
Annex. Capabilities framework.....	14

List of Abbreviations

D	Deliverable
EC	European Commission
EU	European Union
GA	Grant Agreement
GEP	Gender Equality Plan
WP	Work Package
YW	Yellow Window

Acknowledgements

In order not to reinvent the wheel, this deliverable draws upon the work carried out under the SUPERA and Gender-SMART projects. Launched respectively in June 2018 and January 2019, SUPERA and Gender-SMART required from their GEP implementing partners to undertake a self-assessment of their capabilities for conducting change. To that aim, a specific tool was developed for SUPERA and slightly modified for Gender-SMART, consisting of a self-assessment grid and accompanying instructions for its use. GEARING-Roles is grateful to the SUPERA and the Gender-SMART communities who agreed to share with GEARING-Roles their capabilities' self-assessment tool.





Executive Summary

This document is the *Checklist and instructions for gender training needs assessment* (D7.1) developed under task 7.1 by WP7 leader Yellow Window. With a view to effectively identify partners' needs in terms of training and capacity building, to be summarized in the Consolidated training needs assessment (D7.2), the deliverable presents a self-assessment instrument (checklist), allowing each implementing partner to identify available capabilities at the level of its organization, in terms of knowledge and skills, for carrying out structural change. The WP leader will further draw upon this self-assessment, to assess which capabilities need to be built or enhanced. This will strengthen partners in their efforts to implement changes towards gender equality and integrating a gender perspective in science. The deliverable comprises a presentation of the purpose and structure of the self-assessment tool, complemented by instructions for use and the MS Excel self-assessment tool that constitutes the actual instrument to be used by GEARING-Roles' partners to perform their self-assessment.





1. Introduction

This document is the *Checklist and instructions for gender training needs assessment* (D7.1) by WP7 leader Yellow Window on M4 (April 2019). With a view to effectively identify partners' needs in terms of training and capacity building, to be summarized in the Consolidated training needs assessment (D7.2), the deliverable presents a self-assessment instrument (checklist), allowing each implementing partner to identify available capacities at the level of its organization, in terms of knowledge and skills, for carrying out structural change. The WP leader will subsequently draw upon this self-assessment to assess which capacities need to be built or enhanced. This will help partners to implement changes for achieving gender equality and integrating a gender perspective in science. It comprises a presentation of the purpose and structure of the self-assessment tool, complemented by instructions for use and the MS Excel self-assessment tool that constitutes the actual instrument to be used by GEARING-Roles partners to perform their self-assessment.

This self-assessment tool has been developed departing from the premise that the overarching competence required for GEARING-Roles is to implement institutional change for gender equality. With this in mind, a capabilities framework has been built, outlining the capabilities that will have to be mobilized throughout the change process. With a view to cumulativeness, both the capabilities framework and the self-assessment tool itself build upon the reflections carried out under the SUPERA and Gender-SMART projects. Launched respectively in June 2018 and January 2019, SUPERA and Gender-SMART required from their implementing partners to undertake a self-assessment of their own capabilities for conducting change. To that aim, a tool has been developed and enriched based on the experience of the two exercises, which both the SUPERA and the Gender-SMART communities agreed to share with GEARING-Roles. It is thus based on this recently implemented tool that the one to be used under GEARING-Roles has been further developed. On March 22nd 2019, an online workshop was held upon the initiative of YW, bringing together representatives from the three projects, as well as external experts that had contributed to the initial development of SUPERA's tool, to collectively discuss the capabilities self-assessment tool and accompanying instructions. Based on the insights gained through its implementation under SUPERA and Gender-SMART, both the tool itself and the instructions were improved, further clarifying the scope of the exercise, the definition of the different items as well as the composition of the target groups.

2. Purpose of the self-assessment tool

2.1 Framework for the self-assessment

As stated in the Grant Agreement of GEARING-Roles, under task 7.1, partner institutions "will inventory the resources at their disposal internally in terms of expertise, skills and capacities required for the development and implementation of a GEP within a transformative process. It will include a review of the on-the-job training departments and programmes, where gender training actions should ideally be integrated. Required expertise does not only cover topical knowledge (e.g. on implicit bias,





gender sensitive career management, or on the integration of the gender dimension in research disciplines or on fighting sexual harassment) but also a range of soft skills (like facilitation skills, mentoring styles, gender-sensitive communication...)”. As foreseen under task 7.1, the checklist and instructions developed under the responsibility of Yellow Window were further elaborated during a workshop gathering experts from different “sister projects”. This workshop was conducted online. On the basis of the tool and instructions presented in section 3 of the present document, partners will run a diagnosis and training needs assessment internally and YW will subsequently develop a consolidated training needs inventory. The whole exercise is expected to take place from M4 (elaboration of the present deliverable) to M8 (submission of the consolidated needs assessment).

2.2 Scope of the self-assessment

A relevant input from the two above-mentioned projects consists in interpreting ‘capabilities’ as a combination of knowledge, skills and attitudes (or dispositions). For each of these three categories, required components have been identified that together allow to assess whether capabilities are available. In this framework, it is assumed that knowledge - referring to substantive issues, can be acquired, while skills - referring to more technical elements, can be learned. What constitutes an attitude or disposition is yet harder to learn and is rather related to one’s personality and experience. Furthermore, it is assumed that capability can be defined and assessed at different proficiency levels, depending on which components (in terms of knowledge, skills and attitudes) are more or less available and developed. The self-assessment tool thus also aims at capturing *proficiency*. It intends to provide a *picture of available capacities* for conducting change at an early stage of project implementation: a picture that is expected to evolve over time, which can be documented and monitored by regularly updating the data compiled through the self-assessment tool.

The rather exhaustive list of knowledge items, skills and attitudes included to the self-assessment tool is not meant to be intimidating. It is acknowledged that GEP teams are not expected to cover *all* items that feature in this capabilities’ framework, either internally to the core group or through other potentially accessible resources and individuals. Neither will it be expected from teams to follow training for all the items which are not covered. Instead, the purpose of the self-assessment tool is to support self-reflection on capability needs and to identify people who can be reached and are important to mobilize due to their expertise or institutional role: people who can be called upon and mobilized throughout the change process.

2.3 Definition of target groups

The self-assessment tool invites GEARING-Roles partners to identify two different groups of change agents. It is the responsibility of the partners to determine the actual composition of each group, based on the following rationale and their knowledge about their own organization.

Teams established at each partner institution with the purpose of GEP implementation will act as the driving change agents to put each institution in motion. This first group includes the project team (e.g, people at least partly on the payroll of the project, with identified responsibilities as per the Grant





Agreement) but can be extended to key resource persons inside the organization, who are expected to actively contribute to the GEP definition and implementation and the overall project outcomes on a very regular basis. This group, that can also be defined as “core group of change agents”, can be formalized in different ways and convened periodically.

The degree of familiarity of the members of the GEP teams with their organizational environment may vary significantly. While project teams have been built so as to secure the greatest possible expertise and knowledge about the own institution, complex organizations can be difficult to fully map and some departments, units, bodies or categories of stakeholders can be less known to the core teams. Similarly, their members can demonstrate different degrees of familiarity with internal procedures or mechanisms. Hence, implementing this self-assessment tool will be a key activity to enhance knowledge about one’s institution and addressing potential gaps. As such, it will also help partners in the phase of planning and designing their respective GEPs.

Beyond this core group of change agents, an extended group of supporters and allies is also important, and this group should expand over time. This self-assessment exercise is a first opportunity to reflect upon the composition and the role of this extended group. While it is not possible to have a full picture about its composition at an early stage of the project, it is recommended to think about key persons and/or positions within the organization that may contribute to define the project’s outcomes and to foresee the types of knowledge, skills and attitudes these individuals could bring to the GEP implementation. Again, it is the responsibility of each partner to determine the composition of this group. It is however expected that it expands what is available within the core team in terms of expertise regarding gender issues and organizational change, as well as the pool of capabilities to effectively carry out structural change. It can also help increasing the institutional coverage of the project’s activities by integrating other units, faculties or departments or involving stakeholders from outside the institution.





3. Structure of the self-assessment tool

The self-assessment tool has been constructed in MS Excel. It consists of 3 sheets, of which only the first sheet constitutes the self-completion checklist. The figure below shows this sheet. The items contained in it are listed in the annex to this deliverable.

CAPABILITY = knowledge + skills + dispositions		Skills can be learned; what constitutes 'disposition' is harder to learn and is related to one's personality and experience					
		Capability can be defined and assessed at different proficiency levels					
Knowledge			Proficiency among core agents (select from drop-down list: absent - weak - fair - good)	Justify / explain assessment (for internal use; not mandatory)	Proficiency among immediate resource persons / broader GE change group (absent - weak - fair - good)	Justify / explain assessment (for internal use; not mandatory)	Does your institution's professional development programme cover this? (Yes, No)
(content, substantive issues)	K1	Institutional specifics / functioning	(select)		(select)		(select)
Overarching: Institutional change for GE (cfr GEAR)	K2	GEP & implementation (steps, processes, possible interventions, obstacles, resistances, sustainability)	(select)		(select)		(select)
		Topic areas / Issues at stake:					(select)
	K3	Gender & decision-making (participation / processes)	(select)		(select)		(select)
	K4	Gender & diversity in research teams and organisations	(select)		(select)		(select)
	K5	Gender dimension in research content	(select)		(select)		(select)
	K6	Gender in curricula and teaching	(select)		(select)		(select)
	K7	Gender bias in recruitment, selection, promotion	(select)		(select)		(select)
	K8	Organisational culture & work-life balance	(select)		(select)		(select)
	K9	Sexual harassment and gender-based violence	(select)		(select)		(select)





	K10	Gender-sensitive communication and media work	(select)		(select)		(select)
	K11	Gender-sensitive data collection	(select)		(select)		(select)
	K12	Ethical principles (of institution and of GEARING-Roles)	(select)		(select)		(select)
	K13	SMART & SPICED targets / indicators	(select)		(select)		(select)
	K14	Wider stakeholder context (beyond institution)	(select)		(select)		(select)
	K15	Legal and policy context (national / regional)	(select)		(select)		(select)
	K16	Gender and feminist theories (standpoint theory, intersectionality, gender policy analysis...)	(select)		(select)		(select)
	K17	Theories about organizational change	(select)		(select)		(select)
Skills	Research and evaluation		Proficiency among core agents (select from drop-down list: absent - weak - fair - good)	Justify / explain assessment (for internal use; not mandatory)	Proficiency among immediate resource persons / broader GE change group (absent - weak - fair - good)	Justify / explain assessment (for internal use; not mandatory)	Does your institution's professional development programme cover this? (Yes, No)
(technical)	S1	Qualitative research methods	(select)		(select)		(select)
	S2	Quantitative research methods	(select)		(select)		(select)
	S3	Collection of sex-disaggregated data	(select)		(select)		(select)
	S4	Elementary data processing	(select)		(select)		(select)
	S5	Data analysis	(select)		(select)		(select)
	S6	Operationalising M&E criteria	(select)		(select)		(select)
	S7	Evaluative thinking	(select)		(select)		(select)
	Facilitation of change processes						
	S8	Communication (actor-specific, gender-sensitive, responsive)	(select)		(select)		(select)
	S9	Consultation techniques	(select)		(select)		(select)





	S10	Strategic framing	(select)		(select)		(select)
	S11	Negotiation skills	(select)		(select)		(select)
	S12	Coalition building (long term)	(select)		(select)		(select)
	S13	Participatory facilitation and co-creation techniques (for workshops, focus groups, etc)	(select)		(select)		(select)
	S14	Dealing with resistances	(select)		(select)		(select)
	Miscellaneous						
	S15	Project management skills	(select)		(select)		(select)
	S16	Applying ethics requirements	(select)		(select)		(select)
	S17	Developing training for GE	(select)		(select)		(select)
	S18	Delivering professional training for GE	(select)		(select)		(select)
	S19	Resource management	(select)		(select)		
			Proficiency among core agents (select from drop-down list: absent - weak - fair - good)	Justify / explain assessment (for internal use; not mandatory)	Proficiency among immediate resource persons / broader GE change group (absent - weak - fair - good)	Justify / explain assessment (for internal use; not mandatory)	Does your institution's professional development programme cover this? (Yes, No)
Attitudes and dispositions	A1	Enthusing people	(select)		(select)		(select)
(person-related)	A2	Social and interpersonal abilities	(select)		(select)		(select)
	A3	Self-reflection and reflexivity	(select)		(select)		(select)
	A4	Pro-active thinking	(select)		(select)		(select)
	A5	Ability not to take resistances personally	(select)		(select)		(select)
	A6	Adherence to ethical principles	(select)		(select)		(select)

Figure 1. The first sheet, to be completed by the partners





The second sheet provides the totality of the framework, with on top the list of required capabilities, followed by the sets of knowledge items, skills and dispositions. This sheet also provides clarifications for those items that might require some explanation.

The third sheet, finally, is a technical one that contains the answer options for the drop-down answer boxes on sheet 1 and is not to be modified by the respondents.

(select)	(select)
absent	yes
weak	no
fair	
good	

4. Instructions for use

4.1 How to answer the different parts of the tool?

As mentioned above, only the first sheet of the MS Excel file needs to be completed by the partners. In this sheet, the partners are invited to indicate their proficiency level for each knowledge item, skill and attitude. For this purpose, a dropdown list with four answer options is provided: *absent*, *weak*, *fair*, *good*. Agreeing about the level of proficiency corresponding to each of these ratings is part of the exercise and specific exchanges should be devoted to it. Indeed, the way partners will actually self-assess their capabilities will provide relevant indications about their knowledge of their own team and institution, their expected ability to mobilize requested skills, to find support and allies internally and externally as well as about their estimate of the available expertise on gender and/or organizational change.

In order to prevent excessive heterogeneity in the way to apply the four answer options, partners should keep the following in mind: by rating one of the items of the list as “absent” from one or the other targeted groups, it is understood that *none* is at least partially equipped with the considered knowledge, skill or attitude, that is to be built ideally from scratch. Instead, when rating one of the items as “fair”, it is understood that *one or several* members of the targeted group have a proven command of the considered knowledge, skill or attitude, and will be able to *share* it within the group.

The tool contains two columns asking for a proficiency assessment: columns D and F. These refer respectively to the proficiency within the core GEP team, composed of the key change agents in the institution (column D), and among immediate resource persons who constitute the extended group of change agents (column F).





A brief justification or explanation of each given rating is asked in columns E and G. It is strongly recommended to complete these columns as these explanations will help the teams understand their earlier assessment when they refer to it later on in the change process. Indeed, as mentioned before, the self-assessment tool can serve to monitor the progress that is made in the organization towards building institutional capacity for realizing structural change towards gender equality. These brief explanations will also serve the consolidated needs' assessment to be performed by Yellow Window, ensuring that each item was properly understood and answered.

Lastly, in column H, it is asked to indicate whether the institution's professional development programme or on-the-job training scheme covers the respective (knowledge, skill, attitude) item. Here, only two answer options are provided (yes, no). However, feel free to type comments or specifications (e.g. if access is limited to specific staff categories). This information is important for two reasons: first, it will be part of the exercise to map available trainings internally to the organization, as capacities to be built should be developed primarily within the organization and made available in the long term. Second, because such a mapping may reveal that relevant training resources are available (although not specific to gender issues) and could be mobilized to support structural change.

4.2 Methodological approach to the self-assessment

In terms of methodological approach for completing the self-assessment, it is suggested that this is done in a participatory way, involving members of each identified group. The level of participation and stakeholders' engagement can differ for the two groups: as for the GEP teams, their composition partly derives from the project teams already identified at the proposal stage and from the key resource persons to be logically involved in implementing the GEP. Hence, securing the contribution of the members of this group should be relatively easy. As for the extended group of change agents, mapping its composition can be merely tentative at this stage and only part of the expected members to be approached for the purpose of the self-assessment.

Depending on the size of each group, the following approaches can be envisaged:

- The rating to be given to each item can be discussed by the full group(s), seeking to find consensus on ratings, and working its way down the list until the self-assessment is completed.
- Alternatively, the group(s) can be split in two sub-groups who work in parallel on rating first the series of knowledge items, following which the sub-groups are brought back together to compare their assessments and to agree on a shared assessment / rating (and justification) for each item. Next, two new sub-groups are formed to work on the ratings of the skills, after which these are discussed and agreed upon in the full group; to conclude with the attitudes, again by newly formed sub-groups.
- To save time during the workshop, it can be considered to ask the individual project's team members who will participate in the workshop to prepare in advance and to think for themselves how they would rate each item.





- When certain items are unclear, remember that explanations and some references are provided in the second sheet of the MS Excel file.

The exercise to indicate whether or not each of the items in the capabilities' framework features in the professional development programme or on-the-job training scheme of the institution can be performed separately, either before or after the workshop. It is likely that this exercise will require consultation with and/or inputs from the human resources unit or department.

Finally, a note on “gender sensitivity” in relation to the required skills. Of course, ideally, gender-sensitive skills are available (like gender-sensitive negotiation skills, gender-sensitive project management skills, etc.) as it is a real plus if gender-sensitive skills are present in the institution. Still, the tool is not meant to search only for such “gender-sensitive” skills. That would not be realistic, and it is not the purpose to disregard people (especially in the broader group of change agents) who have certain skills but have not applied them on gender. Indeed, it might be easier to find those people and bring them to apply those skills in a gender context and for gender objectives, than the other way around.

5. Practical aspects and timeline for submission

- What to send to Yellow Window?
 - The self-assessment will consist of the Excel file in which the first sheet has been completed. The file is to be saved with the extension “*_abbreviation of the institution's name_date of completion*” (so, for example, “capabilities self assessment_UDeusto_15May2019”).
 - A (short) report describing the process that has been followed for completing the self-assessment, the composition (number of people and functions) of core group and extended group considered for the assessment, any reflections or comments on the tool and the accompanying instructions (if relevant).
- You might consider sending YW a draft of your completed MS Excel file for review before the deadline for submission to YW.
- E-mail address to be used for requests and submission of files: lut@yellowwindow.com.

As soon as the self-assessment tool and these accompanying instructions are shared with the GEP implementing partners, the latter can start with their self-assessment.

The following timeline will apply:

- May 2nd – May 15th - Skype calls with partners to answer questions and provide further guidance
- May 2nd – June 15th - Implementation of the self-assessment tool
- June 17th 2019: deadline for submission of completed self-assessment files to YW
- June 18th – August 14th: YW will consolidate the partners' self-assessments
- August 31st 2019: deadline for submission of deliverable D7.2





During May and June, partners can consult YW should questions arise about the use of the tool that would not have been solved during Skype calls.

Contact: lut@yellowwindow.com.





Annex. Capabilities framework

Below is the list of required capabilities, whereby 'capability' is understood as a composition of knowledge, skills and attitudes. Next are the lists of knowledge items, skills and attitudes. Clarifications of the concepts are provided in the second sheet of the MS Excel file, here below included in italics.

Required capabilities

Stages in the change / GEP cycle:	Required capabilities:
(Throughout the cycle)	Mobilising actors & stakeholders Dealing with resistances Creating ownership
Institutional gender audit / assessment	Diagnostic capacity (of institutional needs & challenges - also beyond gender) Action research
Planning for institutional change for gender equality	Setting priorities Identifying adequate actions / initiatives Identifying and accessing resources (people, money, time, expertise) Setting SMART and SPICED targets <i>SMART indicators are Specific, Measureable, Achievable, Relevant and Time-bound</i> <i>SPICED indicators are: Subjective, Participatory, Interpreted and communicable, Cross-checked and compared, Empowering, Diverse and disaggregated. For SPICED indicators, see:</i> http://www.genovate.eu/media/genovate/docs/GENOVATE_Guidelines_for_evaluating_GEAPs_23.11.16.pdf , p.39
Implementing sustainable institutional change for gender equality	Facilitation of change processes Connecting to strategic institutional objectives & challenges Embedding actions into existing policy frameworks and daily routines
Monitoring and evaluating progress towards gender equality	Developing M&E criteria Developing M&E instruments Fostering self-reflection and reflexivity Reporting and communicating M&E results Fostering M&E results' influence and usage





Knowledge items

- K1 Institutional specifics / functioning
Deep knowledge of the organisation and its functioning
- GEP & implementation (steps, processes, possible interventions, obstacles, resistances, sustainability)
- K2 *Basically, this item refers to components of the GEAR tool: <https://eige.europa.eu/gender-mainstreaming/toolkits/gear>*

Topic areas / Issues at stake:

See the Action Toolbox on GEAR: <https://eige.europa.eu/gender-mainstreaming/toolkits/gear/action-toolbox>

- K3 Gender & decision-making (participation / processes)
- K4 Gender & diversity in research teams and organisations
- K5 Gender dimension in research content
- K6 Gender in curricula and teaching
- K7 Gender bias in recruitment, selection, promotion
- K8 Organisational culture & work-life balance
- K9 Sexual harassment and gender-based violence
- K10 Gender-sensitive communication and media work
- K11 Gender-sensitive data collection about the institution
Applied either generally or to the institution itself (please specify)
- K12 Ethical principles (of institution and of GEARING-Roles)
- K13 SMART & SPICED targets / indicators
Cfr above for clarifications
- K14 Wider stakeholder context (beyond institution)
Experts, networks, policy makers, ... that can be allies, with whom synergies can be sought
- Legal and policy context (national / regional)
- K15 *Cfr also on GEAR, but keep in mind this information dates from 2015: <https://eige.europa.eu/gender-mainstreaming/toolkits/gear/legislative-policy-backgrounds>*
- K16 Gender and feminist theories (such as standpoint theory, intersectionality, gender policy analysis...)
If available, please specify which area or stream of gender and feminist theories
- K17 Theories about organizational change
Not necessarily applied to gender issues. Can relate to any aspect of organizational change/transformation

Skills

Research and evaluation

- S1 Qualitative research methods
- S2 Quantitative research methods





S3 Collection of sex-disaggregated data

S4 Elementary data processing

S5 Data analysis

S6 Operationalising M&E criteria

Evaluative thinking

S7 *"Evaluative Thinking is a cognitive process in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves skills such as identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking and making informed decisions in preparation for action." (from <https://tgarchibald.wordpress.com/2013/11/11/18/>, by Thomas Archibald)*

Facilitation of change processes

S8 Communication (actor-specific, gender-sensitive, responsive)

S9 Consultation techniques

Strategic framing (capacity to strategically frame the change process)

S10 *Capacity to identify the best way to advocate claims and make them pass/capacity to adapt and change the strategy depending on windows of opportunity*

S11 Negotiation skills

S12 Coalition building (long term)

Participatory facilitation and co-creation techniques (for workshops, focus groups, etc.)

S13 *Techniques used for facilitating group work in a participatory way. Co-creations refer to participatory techniques aiming at co-designing specific outputs (such as policy measures, solutions, etc.) with a variety of stakeholders*

Dealing with resistances

S14 *Ability to address resistances (institutional or individual) as part of the process of change itself. Can be supported by specific knowledge about this.*

Miscellaneous

S15 Project management skills

S16 Applying ethics requirements

S17 Developing training for GE

S18 Delivering professional training for GE

Resource management (identifying and managing knowledge and technical resources for change)

S19 *Identifying available resources (in terms of knowledge, skills, time, human resources) for change and using them wisely and effectively*





Dispositions and attitudes

A1 Enthusing people

A2 Social and interpersonal abilities

Self-reflection and reflexivity

A3 *For useful explanations about the difference, and relevant articles on this subject, cfr
https://www.researchgate.net/post/What_is_difference_beteween_reflexivity_and_reflectivity*

A4 Pro-active thinking

Problem-solving spirit, ability to anticipate problems and to find solutions

Ability not to take resistances personally

A5 *Capacity to keep some personal distance from expressed resistances and not to engage
emotionally*

A6 Adherence to ethical principles

