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Learning Organisations in Science and Research: The Role of Transfer Agents in Gender Equality Change Processes

Anita Thaler

20. April 2016

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Summary

In this report the knowledge transfer concept of the project GenderTime¹ will be explained and its instruments shared (annexe).

The two main objectives of this aforementioned project were

- 1.) the implementation of action plans promoting equal opportunities in the participating science and research organisations as well as
- 2.) the exchange of experiences in so called knowledge transfer activities (cf. [Tsai 2001](#)), for instance via transfer agents and also through on-site visits (cf. [Epper 1999](#))

In the first part of this report the framework of projects with a focus on knowledge transfer will be explained on the background of the theory of learning organisations. Then the idea of knowledge transfer and the crucial role of transfer agents will be explained further. In the following concepts and material for knowledge transfer workshops as well as knowledge transfer collections will be explained and actual instruments shared.

Finally some ideas of a potential impact of such a knowledge transfer-focused approach will be discussed.

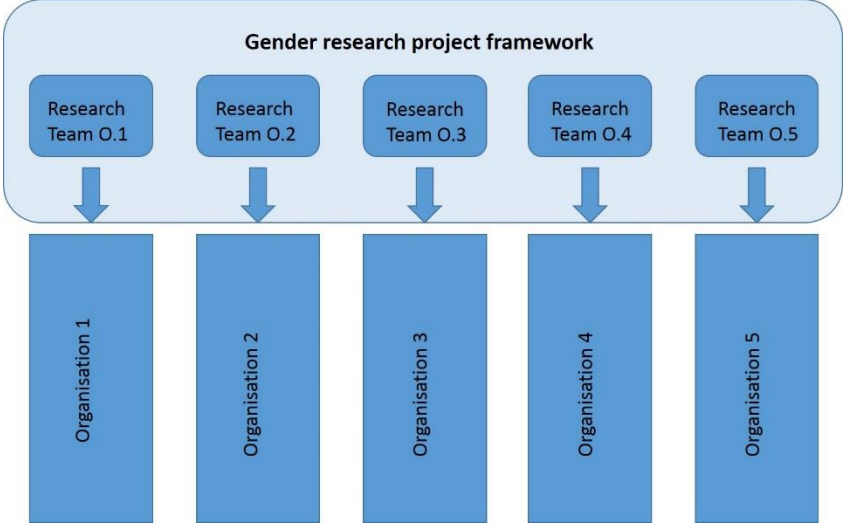
¹ “GenderTime - Transferring Implementing Monitoring Equality” is a project financed by the European Commission (FP7-Science-In-Society) and carried out 2013 to 2016 by Egalité des Chances dans les Etudes et la Profession d’Ingénieur en Europe, France (coordinator); Università degli Studi di Padova, Italy; Gothenburg University, Sweden; Université Paris Est Créteil, France; Mihailo Pupin Institute, Serbia; Bergische Universität Wuppertal, Germany; Loughborough University, United Kingdom; Fundacion TECNALIA Research & Innovation, Spain; Donau-Universität Krems, Austria, and IFZ – Interuniversitäres Forschungszentrum für Technik, Arbeit und Kultur, Austria. The content of this research report is related to the work package “Knowledge Transfer” conceptualised and led by the author, Anita Thaler (more about the project: <http://www.gendertime.org/>).

Content

- Summary 3
- Content 4
- The framework of a knowledge transfer-focusing gender equality project 5
 - Gender-learning organisations in science and research..... 6
 - The idea of knowledge transfer..... 7
 - The role of transfer agents (TAs) 7
 - The didactical approach behind the knowledge transfer concept 7
 - Knowledge transfer workshops 8
 - Internal kick-off-meetings with the TAs 9
 - Gender equality knowledge transfer via on-site visits 10
- Collection of knowledge transfer activities 13
 - Knowledge Transfer Actors 14
 - Knowledge Transfer Activities 14
- The role of knowledge transfer in changing of gender practices and policies 18
- References 19
- Annexe..... 21
 - The first knowledge transfer workshop (year 1): learning within organisations..... 21
 - The second knowledge transfer workshop (year 2): learning across organisations 25
 - The third knowledge transfer workshop (year 3): exchanging knowledge with experts .. 28
 - The final knowledge transfer workshop (year 4): exchanging knowledge with stakeholders 30

The framework of a knowledge transfer-focusing gender equality project

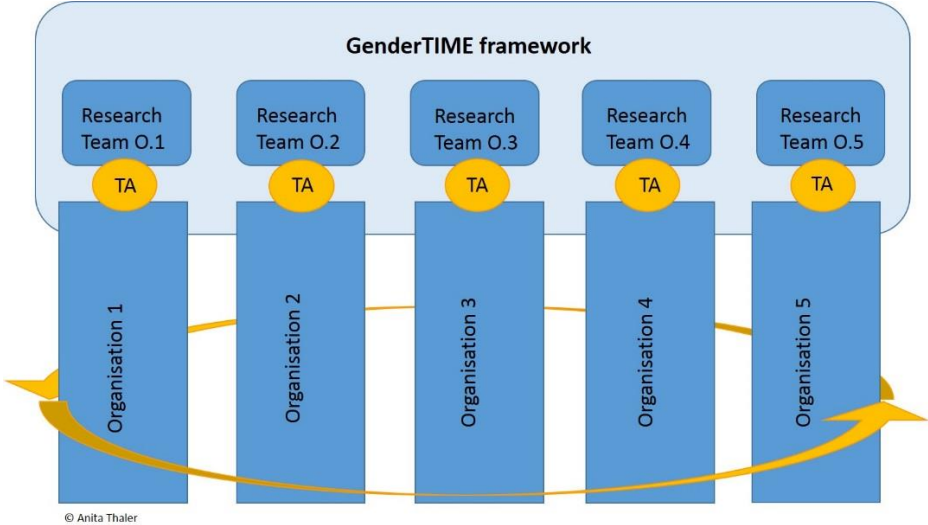
The specific framework used in this project gives the possibility to produce sustainable changes within the consortium organisations and hopefully outside too. The following two graphs show the differences between standard research frameworks and the one used in this gender equality implementation project, using transfer agents, on-site visits and ongoing knowledge transfer activities.



Graph 1: Standard framework of gender research projects

Graph 1 illustrates the gender research approach, where research teams do research about (their) science and research organisations, learn more about gender inequalities and usually finish their work by recommending tasks and changes in order to improve gender equality in the researched organisation(s).

In contrast to this, graph 2 shows the connection of research and implementation by highlighting the role of transfer agents (TA).



Graph 2: Framework of the aforementioned project GenderTime

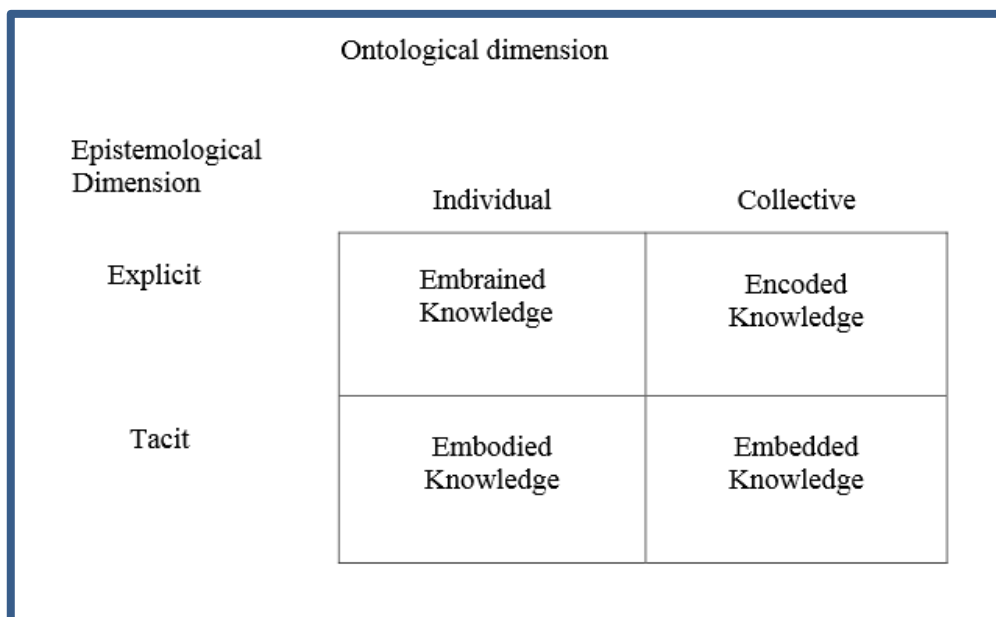
Additionally, the necessity to transfer knowledge (via transfer agents and project team members) has three aims:

- to institutionalise gender equality measures in the respective institutions (by working with transfer agents, who are already in charge of relevant tasks in their organisations – see chapter “The role of transfer agents (TA)”)
- to learn from each other within the project, across organisations (and countries; see chapter “Gender equality knowledge transfer via on-site visits”) and
- to be able to tell others about actual gender equality implementation (by making implicit knowledge explicit, we can tell about what worked and how?; see chapter “Collection of knowledge transfer activities”)

Gender-learning organisations in science and research

The implementation of gender equality is a learning process – or more precisely an organisational learning process – with a view to enhancing gender equality in the respective organisations. Gender mainstreaming and gender equality processes in scientific organisations need institutional transformations which mean a change in the formal and social structures maintaining gender inequalities.

One reason why gender inequalities are so persistent is that they are based on organisational routines and social practices which are not explicit and reflected – i. e. they are based on embedded knowledge (Lam 1998).



Graph 3: Knowledge types (Lam 1998, p.43)

Consequently, a first step to transfer organisational knowledge is the attempt to make tacit knowledge visible and to analyse routines and practices. In a next step new knowledge can be acquired, and practices can be adapted or new ones implemented (for instance, recruitment processes need to be analysed and existing social practices related to them examined in order to recognise their part in maintaining/supporting gender (in)equality in institutions).

The idea of knowledge transfer

In the centre of this report stands the idea of sharing knowledge about gender equality and especially about the concrete implementation of gender equality measures in science and research organisations. The diversity of the participating institutions in the concrete project of this report allows the comparison of institutions with similar preconditions (for instance size, focus, status, location, policies) on the one hand and of social practices in the respective institution on the other hand. This means that despite diverse external preconditions of institutions, they have similar social practices in common which facilitates the exchange of experiences (for instance, when a specific mode of leadership makes implementation of certain measures easy in one department and difficult in another one).

Therefore it makes sense to take a closer look at where which kind of knowledge transfer is appropriate. The two levels of knowledge transfer in this report are:

1. The sustainable putting into action of gender equality knowledge within the science and research organisations.
2. The transfer of gender equality knowledge to other organisations and stakeholders within science and research.

The role of transfer agents (TAs)

Learning organisations are aiming at knowledge transfer beyond the individual level. In order to transfer (and implement) gender equality knowledge in a strategic manner, it is necessary to involve individuals in powerful and relevant positions, who are committed to the idea of gender equality in science and research, and support the implementation of the gender equality plans. These individuals in their respective positions are the so called **Transfer Agents (TAs)**.

TAs will – and this is explicitly new in this project – secure a sustainable implementation of gender equality actions in their institutions beyond the duration of the very project. Because TAs are relevant stakeholders of institutional changes in regard to gender equality, e. g. heads of institutions or equal opportunity officers, their involvement and commitment is activated by the project but goes on afterwards as they stay in their institutional function.

This is how TAs have been found in this project: Heads of institutions, departments, equal opportunity officers, human resources managers, etc. have been asked whether they would support the cause of this gender equality implementation project and their national teams in the task of sustainably implementing gender equality measures according to the action plans.

However, the specific roles and possibilities of support available to the respective TAs have to be defined for each institution because what the respective TAs are able and willing to do depends on their position, time and motivation. The commitment of a TA can be moderate and a rather moral support (plus involvement on specific occasions like TA workshops) or it can be (ideally) higher and lead to a very active and continuous collaboration. It is important to stress in the beginning that any kind of support is welcome and appreciated, because sometimes the involvement increases through the process.

The didactical approach behind the knowledge transfer concept

Didactics is the science of effective teaching. A didactical concept describes the interaction of teaching and learning in the educational process. In adult and further education learning

often happens outside formal educational arenas (like schools, universities) but often takes place in the context of the working environment (Arnold 2010).

In a broader sense didactics can be defined in the context of adult education or organisational learning – as it is the case in this project – as intermediation between the logic of the content and the logic/psychology of the learner (Siebert 1997). The logic of the content comprises knowledge of the structure and contexts of the topic, whereas the ‘psycho-logic’ comprises motivation and the learning context of the learner. Bringing both sides together in an arrangement of the learning process is to be understood as the didactical action, „didaktisches Handeln“ (Siebert 1997), of the trainer. The main didactical principles in adult education are (ibid.):

1. focus on the learner
2. relation to experience
3. consideration of the living environment
4. practical relevance

Based on these principles, adult education asks two important questions:

- Which meaning has the topic had for the learners so far? (2 & 3)
- Which meaning will the topic have for the learners in future? (4)

The first didactical principle, learner-centeredness, acts as an indicator for whether the learners can actually influence the learning process through e. g. participatory methods and because their subjective and socio-biographical conditions are considered (Arnold, 2010).

Knowledge transfer workshops

In the realm of this gender equality implementation project so called “knowledge transfer workshops” have been conceptualised and organised once a year, to share gender equality knowledge from the project and from the contexts of the specific science and research organisations and participating countries.

The objectives of the **first knowledge transfer workshop** concept are based on all four previously explained didactical principles (focus on the learners, relation to their experience, consideration of their living environment, and practical relevance):

- The researcher team and, most importantly, the transfer agents (TAs) meet each other.
- The TAs have the opportunity to exchange experiences with gender equality measures in their own institutions.
- The TAs have the opportunity to share reservations and expectations of their own as well as of others in their institutions regarding the implementation of certain gender equality measures.

But even before meeting others, the TAs have to be integrated in the project teams in the respective organisations, in internal kick-off-meetings (see next chapter).

The **second knowledge transfer workshop** (in year two) focusses on two topics :

- Experiences with the gender equality plans in the participating organisations.
- Knowledge transfer outside the own institution.

For that purpose a workshop design based on the method of the knowledge café (or world café) is used (details in the annexe).

The **third knowledge transfer workshop** aims at sharing knowledge transfer experiences and exchange concrete gender equality knowledge with gender experts from science and research (detailed description see annexe).

The scope of the whole project at this point (2.5 years finished, 1.5 years to go) is to strategically plan and organise knowledge transfer possibilities for multipliers (project members) and transfer agents to transfer knowledge

- about the process (How did we change our organisations towards more gender equality?) and
- about the content (What did we change ...?) of the actual gender equality plans and implementation activities

within the project's organisations and to outside academic communities, science and research organisations and policy makers (science ministries, funding agencies, etc.).

The **final (in this case fourth) knowledge transfer workshop** is a gender equality knowledge exchange workshop with relevant stakeholders from all participating countries (and beyond), and can be combined with a project conference.

To create a successful final knowledge transfer workshop, we recommend the following (see also annexe):

- Inviting relevant stakeholders (decision makers from higher education, ministries, regional policy makers, industrial research, research funding organisations etc.) from all consortium countries and Europe generally.
- Facilitate the time and place for a meaningful knowledge exchange in larger and smaller groups (for instance let stakeholders talk in part of the event in groups with the same language).
- Create a welcoming atmosphere by choosing a nice place, nice rooms, food and drinks (must be free and available throughout the whole workshop day for all invited stakeholders).
- Offering an interesting and interactive setting, where stakeholders do not only have to listen to others (and their presentations) but also share their own important experiences and knowledge.

Internal kick-off-meetings with the TAs

Prior to a first TA-workshop with all project members and TAs (across organisations and countries) teams on an organisational level have to be formed and provided with basic information on gender equality in science and research and the specific role of TAs.

The preparation of these organisational teams and their TAs give the opportunity for the first knowledge transfer workshop to start with the "exchange/interaction part" of the knowledge transfer. The internal kick-off-meeting comprises:

- a presentation of the project in general,
- information about the status quo in the respective institution,
- tailor-made definitions of the role of the TA,
- basic information in the national language,
- information tailored for the needs of the respective TA.

The first task on the agenda of the internal kick-off meeting is the presentation of the project, its objectives and the consortium, and the explanation of the importance of knowledge transfer. Material used in the internal kick-off meetings should be in the respective national language and be rather short. It is important to adjust the content and the form of presentation to the respective TA (formal – informal; level of gender expertise; etc.).

TAs are generally defined as

- ✓ entitled to implement gender actions in their own institutions (“individuals in powerful and relevant positions”) and therefore
- ✓ in the position to transfer knowledge from the gender equality implementation project into their institutions.

We suggest to talk about the institutional definition of the TA-role and to define a regular communication strategy with the team (informing the TAs about the project and about institutional gender actions etc., meeting and discussing as often as the respective TA and the project team in each institution think is working for them).

The second step in the internal kick-off meeting is to share information about the current situation regarding gender equality measures in the respective institution (gender segregated data on human resources, recruitment, career, etc.) and discuss these findings with the TAs.

Maybe the TAs have additional information, maybe they learn something new about their own organisations, and maybe they gain more insights into what we are practically looking at such a gender equality implementation process.

The discussion about the status quo within the respective institution should help to connect the general topic of gender equality in science and research to each TA (“learner-centeredness”, “practical relevance”). Talking about concrete actions or inequality issues in their own institutions makes the topic relevant and raises the motivation of TAs to engage in the actions and to optimise organisational structures, and maybe the TAs already talk about possible reservations or about which actions they would like to implement.

Finally, all TAs should know which gender equality measures are already implemented (or planned, if there are no implemented measures available yet) in their organisation, because this will be used for their introduction at the first knowledge transfer workshop (see annexe).

Gender equality knowledge transfer via on-site visits

The project described in this report is founded on the idea that the knowledge gained throughout the project should be shared within the consortium and beyond; moreover, institutions with more experience in promoting equal opportunity can support others with expanding and evaluating their measures during workshops (like the knowledge transfer and transfer agents workshops) and on-site visits.

Regarding financial issues: On-site visits should be part of the contract, they can be financed through the travel budget similarly to when partners attend a conference for disseminating project results. If more money is required for on-site visits, fellowship programmes or grants can be taken into consideration: Some institutions offer the possibility for researchers to spend e.g. a sabbatical or a crucial phase of writing (papers, thesis, etc.) with them to use their infrastructure and network. One example would be the IAS-STs hosted by IFZ in Austria: www.ifz.at/ias/IAS-STs

In general, there are three main possibilities for sharing knowledge during on-site visits:

- 1.) A member of the gender equality implementation project visits another organisation of the same consortium.
- 2.) A member of the project consortium visits another research institution or academic organisation outside the consortium.
- 3.) Members of research institutions or academic organisations outside the project consortium visit an organisation of the project consortium.

		Host organisation	
		Organisation of the project consortium	Other research institution or academic organisation
Visiting organisation	Organisation of the project consortium	Project internal on-site visits	Gender equality project knowledge transfer and dissemination
	Other research institution or academic organisation	Gender equality project knowledge transfer and dissemination	

Graph 4: Types of onsite-visits

While the first option would be an consortium internal on-site-visit with the aim of exchanging experiences with promoting equal opportunity; the second and third options are a combination of knowledge transfer (which can work both ways) and project dissemination activities.

Project internal on-site visits

Facts about project internal on-site visits in a nutshell:

- On-site visits can last from 2 days up to 1 month.
- Visiting multipliers are either transfer agents or other members of the project consortium.
- The host institution must be part of the project consortium and already be able to provide experience in specific areas of promoting gender equality (“good practice”) in science and research.
- Host multipliers are members of the consortium who help the visitors with
 1. organising the on-site visit at the institution (does not include booking the travel, hotel, etc.), and
 2. translating the national language into English (if necessary).

Visiting multipliers should prepare their on-site visit by asking:

1. Which institution of the project consortium can already provide with good practice in a field of interest for my own institution?
2. Which specific practice(s) or policies do I want to learn more about during my stay at this very institution? What are the specific questions to be answered during my on-site visit?

3. How do we arrange our knowledge transfer on good practices during my stay? At least one workshop is recommended, face-to-face interviews, regular meetings with the host multiplier etc.
4. Do I have additional plans for a knowledge transfer activity with the host institution/the host multiplier? For instance, writing a paper about GenderTime together with the host multiplier during the on-site visit or preparing a joint presentation for an upcoming conference or meeting, etc.
5. How can I transfer the knowledge gained during the on-site visit into my own organisation?

These questions and answers then have to be discussed with the host institution or rather with the potential host multiplier from the project consortium. A time frame has to be defined in terms of when and how long the on-site visit will take place.

Furthermore, some practical questions have to be dealt with:

- Travel modalities and accommodation: tips from the host are very welcome, especially in regard to affordable accommodation for a longer stay
- Office space: is it possible for the guest to have an office space, share an office or have an office of their own) and equipment (does the guest have their own computer or need one provided by the host organisation, access to the internet, telephone, desktop, etc.)

Organising the on-site visits:

It is recommended to organise at least one **workshop** where the specific practice the guests want to learn more about will be discussed with persons responsible. This workshop should be designed in a way that all participants (hosts and guests) receive an additional value (e.g. visibility of the workshop within the institutions and beyond, future cooperation, etc.). For a real exchange, the workshop setting should include the possibility for the guests to report about their institution, too.

The guests should be **walked around** the host institutions because materialised practices can give valuable insights even if the national language is not understood. Such materialised practices could be pictures of women scientists in hallways or in assembly rooms, leaflets about good practices, gender equality offices, feminist sections in libraries, social practices, etc.).

If there are persons responsible for personnel available at the host institutions, it would be valuable for the knowledge transfer to organise one or more short face-to-face meetings for the guests to receive dense insight information on specific practices of interest.

The host institutions may learn from the guests too: The perspective from a guest can give valuable insights into how an institution is perceived (e.g. if something is perceived as good practice but not even mentioned by the host institution because it is a long established practice). Therefore it is recommended to have at least one **feedback-meeting** at the end of the on-site visits, where the guests tell about their experiences at the host institutions and possible misunderstandings can be clarified before the guests travel home.

Organising the knowledge transfer at home:

The “**coming home**” phase is another important part of on-site visits: Only by transferring the knowledge gained in the on-site visit into one’s own institution the multiplier effect of the visit can be fully achieved:

- It is recommended to organise at least one **workshop** with all other project colleagues of one’s own institution (incl. the transfer agents) and other interested people (e.g. from human resources departments).
- Furthermore, a short written **report** about the on-site visit, which could also be the basis for the feedback meeting with the host institution, should be shared within the whole project consortium. This report should comprise the initially planned learning target (which “good practice” should be in the focus?), the actually performed activities in the host institution (workshops, meetings, etc.) and a reflection about the gained knowledge and insights.

Helpful recommendations for on-site visit experiences:

Based on actual experiences, these are recommendations for on-site-visits:

- Be prepared for your guest visitors (provide helpful information, brochures etc.).
- Bring interesting persons together (staff association, research council, human resources dep. etc.).
- Focus on one main goal of the exchange (e.g. career paths) but be open for not-expected information share (e.g. structural similarities which were not visible at first sight, association vs. university).
- Provide an agenda for your on-site-visit and define exchange possibilities after returning home.
- Plan enough “free time”, sometimes the unexpected, which needs extra time brings much additional value in terms of exchanged knowledge.
- Enjoy time together!

Gender equality project knowledge transfer and dissemination

Visits to or by other organisations from outside the project consortium cannot be prepared completely the same as internal on-site visits. We suggest the following steps:

- Receive or write a formal invitation for the on-site visit
- The on-site visit should ideally comprise:
 - one workshop and/or bilateral discussion/interviews with the host about a topic relevant for the gender equality project (knowledge transfer part)
 - one presentation about the gender equality project (dissemination part)
- The on-site visit should be well documented:
 - photos of guest(s) and host(s)
 - a short description of the activities for the news section of the project website
 - a short “knowledge transfer” report about the on-site visit

Collection of knowledge transfer activities

To prepare all project teams including the institutional transfer agents (TAs) for the third knowledge transfer workshop, this template can be used for a national collection of knowledge transfer activities. The templates consist of a collection of various activities which should be filled out as a whole until an agreed deadline later in the project, but for the knowledge transfer workshop the focus lies on so called “knowledge transferring and further multiplying activities outside the project institutions” with should be filled out and discussed

with the respective transfer agents before the actual knowledge transfer workshop internally (see annexe).

Knowledge Transfer Actors

(Please indicate names of all participating actors of knowledge transfer in your institution)

Name	Role of project members					Active years ³
	Team leader	Transfer Agent	Team member	WP-Leader	Other ²	

Knowledge Transfer Activities

Project meetings and knowledge transfer workshops

Participation in project meetings and knowledge transfer workshops

(Name of actors refers to members of your project team)

Names	Activity (Meetings, workshops)	Date
Names of actors	Activity 1	
Names of actors	Activity 2	
	...	

² If you have further roles in your gender equality implementation project, please indicate them.

³ Implementation projects span several years, but some team members and transfer agents might have left at an early stage or joined the project further along the line. Please indicate the years in which each of the listed actors joined/exited the project (disregarding their roles and whether they changed roles in the course of the project – we are mostly interested in the timeframe of active change agents and multipliers).

Reflexion about knowledge transfer effects

Please reflect on the effects of the knowledge transfer activities on your team and/or institution (What did you learn? What became clearer? What could you tell others? Which setting helped you to exchange knowledge? Which setting of knowledge transfer within meetings had the most impact (in terms of learning from others, exchanging knowledge etc.)? ...)

Internal knowledge transfer activities

Internal knowledge transfer refers to activities within your own institution, with members of your organisation.

Overview of internal knowledge transfer activities

Please list internal knowledge transfer activities organised since the beginning of the project.

(Name of actors refers to members of your project team; target group means role(s) of addressed persons)

Name	Activity (Meetings, workshops, internal presentations, etc.)	Aim of the activity	Target group
Names of actors	Activity 1		
Names of actors	Activity 2		
	...		

Reflexion about internal knowledge transfer activities

Please reflect on

- a) hindering and supporting factors you have experienced in the context of these activities. You may find the information you collected for the third monitoring tool of WP 3 useful for answering this.
- b) the effects of the knowledge transfer activities on your team and/or institution.

On-site visits at other project consortium institutions

Overview of on-site visits at other GenderTime institutions

Please list the on-site visits at institutions WITHIN the project consortium you have made so far.

(Name of actors refers to members of your project team)

Name	Institution visited	Date
Names of actors	On-site visit 1	
Names of actors	On-site visit 2	
	...	

Description and reflections about on-site visits at other project consortium institutions

Please

- a) insert a short report on the respective on-site visit.
- b) reflect on the effects of the on-site visits on your team and/or institution (reflect also on the effect of different settings of on-site-visits – what worked best?).

On-site visits at institutions outside the project consortium

Overview of on-site visits at other institutions

Please list the on-site visits at institutions OUTSIDE the project consortium you have made so far.

(Name of actors refers to members of your project team)

Name	Institution visited	Date
Names of actors	On-site visit 1	
Names of actors	On-site visit 2	

Description and reflections about on-site visits at other institutions/organisations

Please

- a) insert the report on the respective on-site visit.
- b) reflect on the effects of the on-site visits on your team and/or institution (reflect also on the effect of different settings of on-site-visits – what worked best?).
- c) describe the feedback you got from members of the other institutions (what kind of effect can be assumed?).

Further multiplying activities

Overview of main further multiplying activities

Please list the most important activities where relevant knowledge transfer took place – either by you to other institutions/stakeholders or by other good practice cases for you:

- conferences, workshops etc. where a presentation about the project has been given;
- academic or non-academic publications about the project;
- other networking activities e.g. with other gender equality implementation projects;
- gender equality related lectures or university courses;
- political networking activities;
- important project-related media activities.

(Name of actors refers to members of your project team; target group / networking partners – the persons/type of audience you exchanged knowledge with; they do not have to be named individually but categorised, e.g. whether they are researchers from another gender equality implementation project or policy stakeholders, politicians, students, non-academic audience etc.)

Name	Activities	Target group / Networking partner	Date
Names of actors			
Names of actors			

Reflexion about main further multiplying activities

Please reflect

- a.) on the effects of these activities on your team and/or institution (What did you learn? ...)
- b.) on the effects of these activities on your target group/ networking partners (Which feedback did you receive (e.g. feedback on gender equality knowledge; invitations to further activities)? Could you indicate changes on a policy level (e.g. changes in practice, new rules, institutionalisation of new practices/rules)? etc.)

The role of knowledge transfer in changing of gender practices and policies

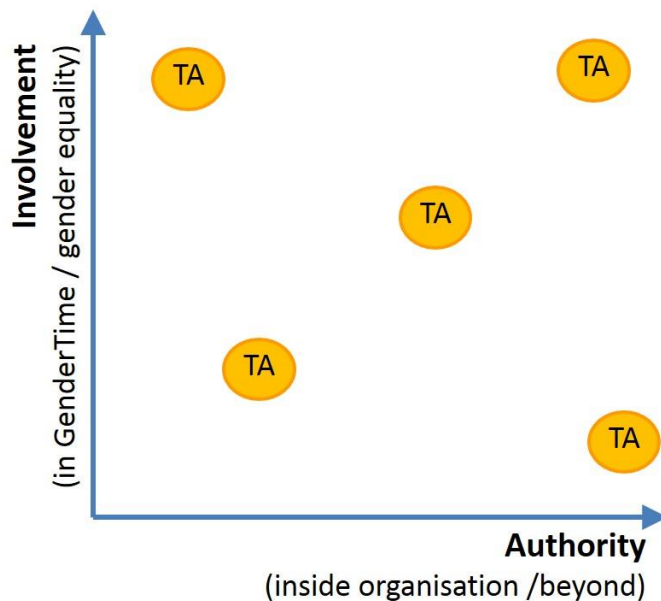
Like mentioned in the beginning of this report, one of the ideas of using a knowledge transfer focus and especially including transfer agents is to institutionalise gender equality in science and research. One main idea is that by including relevant stakeholders right from the beginning (like managers from human resources or gender equality officers from the respective organisations) the gender equality plans are actually manageable and the topics discussed within the organisations (within the national project teams) are relevant (“customised”) for their needs. With this approach the translation process (to be applicable in practice) at the end of the project should be not necessary or at least minimised in comparison to “traditional” research projects. And as the project is an implementation project, actual organisational policies and practices should have been started to change or even changed in the time frame of the project. For the time after the project the transfer agents are still in charge of the gender equality implementation.

Additionally through various networking and transfer activities with stakeholders outside the organisation (policy makers, other institutions, etc.) the gender equality knowledge can be shared with others and positively influence gender policies and practices beyond the project organisations.

Of course that is the ideal version of the knowledge transfer approach, and the final monitoring and evaluation reports will tell whether a gender equality implementation project could meet these goals. However, the instruments explained and shared in this report should support other projects and organisations to use the concept of knowledge transfer to improve gender equality within their realm. The collection of knowledge transfer activities can be used as a monitoring and evaluation tool as well.

For the project GenderTime, it could be found out with data collected by project partners about their knowledge transfer activities that the impact of transfer agents (for improving gender equality policies and/or practices) depends on their involvement in the project and their authority. In other words, the involvement means commitment towards gender equality in science and research and authority means power/networks/influence within their own

organisation and beyond. So it could be observed that a variety of different transfer agents had very different impact on gender equality implementation processes (see graph 5).



Graph 5: Impact of transfer agents

Sometimes the highest managers in academic or research organisations are too busy to attend regularly in knowledge transfer activities and workshops, so the commitment with the gender equality project can be lacking, and in consequence although the transfer agents' influence would be theoretically very high, it would not be necessarily used accordingly. This means for transfer agents a medium influential position with commitment towards gender equality, which allows taking part in the project and implementing gender equality measures in the own organisation seems to be a very promising approach.

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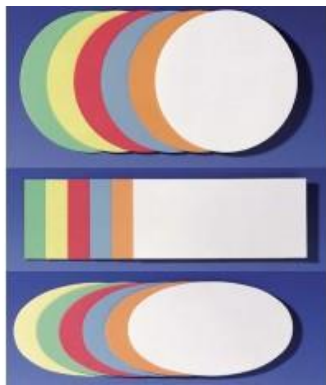
Tsai, Wenpin (2001). Knowledge Transfer in Intraorganizational Networks: Effects of Network Position and Absorptive Capacity on Business Unit Innovation and Performance. In: Academy of Management Journal, Vol. 44, No. 5, p. 996-1004. Online: <http://www.personal.psu.edu/faculty/w/p/wpt1/Knowledge%20Transfer%20in%20Intraorganizational%20Networks%20Effects%20of%20Network%20Position%20and%20Absorptive%20Capacity%20on%20Business%20Unit%20Innovation%20and%20Performance.pdf> [28-05-2014]

Annexe

The first knowledge transfer workshop (year 1): learning within organisations

Organisational information

- ✓ When and where will the knowledge transfer workshop take place?
- ✓ All participants of the knowledge transfer workshop should wear badges with their names and the names of their institutions on it.
- ✓ Two moderators and one persons who takes notes are recommended.
- ✓ The room should have enough space for all team members (including TAs), and it is also spacious enough to sit and work together undisturbed in small groups.
- ✓ The moderators and TAs need flip chart (paper and pens), cards, pins and a pin-board.



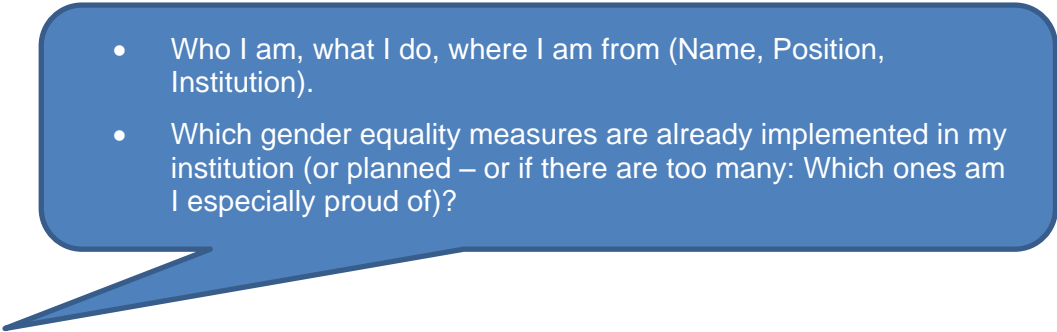
Workshop contents and didactics

1. Introduction and confidentiality (approx. 20 min.):

At first, the moderator will give a short introduction about the aim and the schedule of the knowledge transfer workshop. Then, confidentiality⁴ will be discussed: There will be no names or details in the minutes of the TA-workshop, the minutes will not be published, and they are solely for internal purposes. If information related to the workshop is mentioned in publications, this will only be on the process or from a meta-perspective without naming institutions or names.

2. About gender equality in research and in our institutions (approx. 60 min.):

In order for the TAs to get an idea about where their own institution is standing and where the others are to be seen and what the objectives of the project can practically mean for them or their institutions, we start with an introduction round:

- 
- Who I am, what I do, where I am from (Name, Position, Institution).
 - Which gender equality measures are already implemented in my institution (or planned – or if there are too many: Which ones am I especially proud of)?

For the second question, when TAs talk about successfully implemented⁵ gender equality measures in their institutions, they can use the measures each institution collected and described in the gender equality plans for the project. We have to keep in mind that this introduction is not aiming at “monitoring and evaluating” but is rather a motivational form of introducing a person and her/his institution to the whole consortium. The TAs should be feeling comfortable in their role and therefore presenting existing measures they are proud of. If they are critical about their institutions themselves it is absolutely okay, but we should not stress ‘the long way ahead’ at this point in the beginning.

As an effect of this introduction, all TAs get an impression about the level of gender equality in all institutions involved and maybe also get ideas for what kind of actions they would like to introduce to their own institutions.

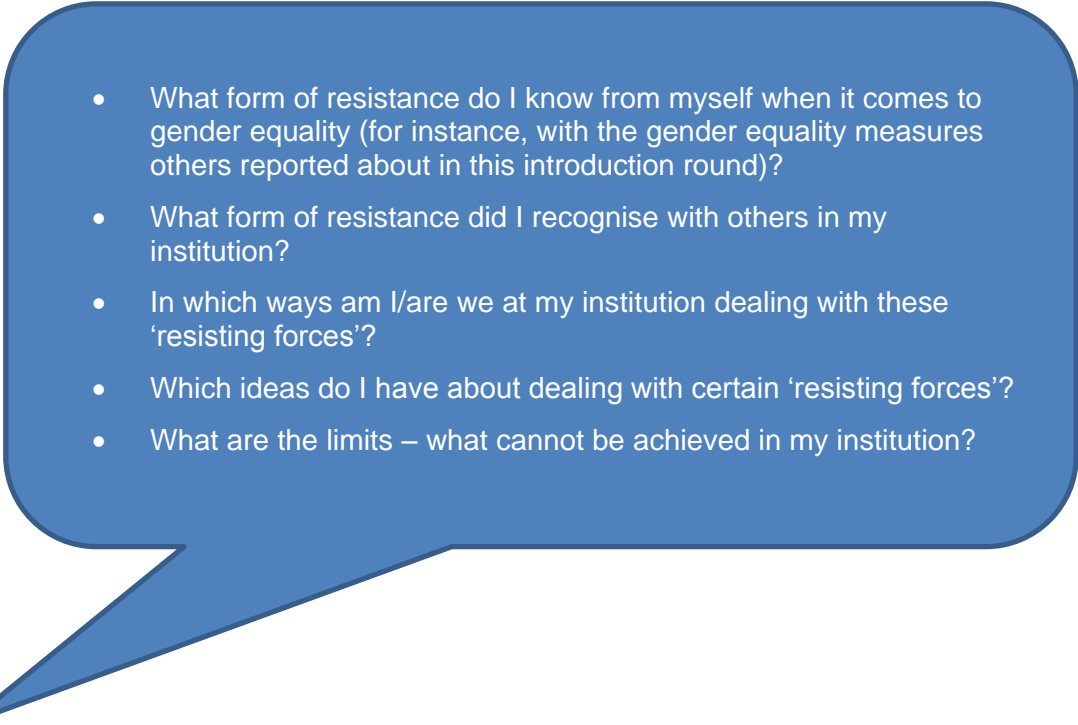
At this point of the project, in this first workshop, the main objective is to motivate the TAs and strengthen their commitment. It is not necessary to give all TAs a complete overview of all actions implemented in all institutions.

3. About resistance towards gender actions (approx. 60 min.):

⁴ Confidentiality issues are generally a sensitive topic in such projects but they should be especially emphasised in the knowledge transfer workshops working with TAs.

⁵ “Successfully implemented” does not mean “evaluated”; we just want to exchange experiences at this point.

We have to keep in mind that some gender equality measures have not been implemented yet due to some 'resisting forces'. Therefore we will ask the TAs to form pairs or small groups of three and discuss the following questions:

- 
- What form of resistance do I know from myself when it comes to gender equality (for instance, with the gender equality measures others reported about in this introduction round)?
 - What form of resistance did I recognise with others in my institution?
 - In which ways am I/are we at my institution dealing with these 'resisting forces'?
 - Which ideas do I have about dealing with certain 'resisting forces'?
 - What are the limits – what cannot be achieved in my institution?

The pairs/small groups should be formed by the TAs themselves, as they got first impressions from the introduction round about other involved institutions. This also leaves the possibility to match people with same languages, if they want to.

As an introduction to the group discussions we give some examples to the TAs to trigger some ideas.

The TAs will talk about their experiences with resistance within their own institutions in pairs/small groups (2-3 persons) and take down

- forms of resistance,
- possible solutions to certain forms of resistance and
- limits of gender actions due to resistance

on cards (one thought per card). After that we collect the experiences (cards) in the plenum, pin them on a pin-board and talk about possibilities and limits of overcoming resistance issues.

4. TA-knowledge exchange, capacity building and communication (approx. 20-30 min.):

In the final part of the workshop we will talk about planned activities (next TA workshop in a year) and discuss communication channels.

- We already have an email list for the TAs through which they can easily communicate, and we can offer to create some web space if TAs would like to have another forum to exchange ideas and discuss among themselves. However, this should be only an option; there is no use to set up a forum which will not be used.

- In addition, we will also inform the TAs about possibilities to gain knowledge about gender equality in research: This information can either be circulated within each national team (from project members to TAs) or via the email-list (only for conference invitations) – here we should also ask the TAs about the preferred mode of communication. For instance, conferences like "Gender Equality in Higher Education", where managers and gender experts are meeting, are preferably to be shared (no academic conferences where gender scholars discuss latest theories ...) and information about other relevant EU projects dealing with gender equality.
- We could also mention the possibility of on-site visits to other partner institutions during the next years – maybe there are some TAs interested to take a look at another organisation in the consortium?

5. Open questions (approx. 10 min.)

At the end of the workshop, the TAs can ask questions that have not been answered yet.

The TAs and the whole consortium will get a photo documentation comprising information on flip-charts and pin-boards.

The second knowledge transfer workshop (year 2): learning across organisations

The content of this workshop is based on the gender equality implementation and knowledge transfer activities and will take place in the second year of the project (early midterm).

Participants and objectives

Three types of participants, project members and transfer agents as well as external advisors, can become knowledge multipliers and therefore participating in the workshop. The objectives of the workshop are defined by the answers to the question: What information do we want to leave the meeting with? We would like to get inputs supporting the implementations of the gender equality plans in our organisations:

1. Which actions to be implemented in our organisation require further input and is there an organisation in the group with good practice that could provide useful input (e.g. through on-site visits)?
2. What information can we offer to others regarding good practice in our institution?

Work to be carried out by all organisations prior to the workshop

For the workshop to be successful and for an effective sharing of information between the partners and other involved actors (e.g. transfer agents) there are some tasks that will have to be fulfilled by the partners prior to this second knowledge transfer workshop:

- The gender equality plan designed by each partner has to be updated before the workshop.
- Surveys about the status of gender equality will have to be launched in each partner organisation and the results gathered in a comparable gender equality report. It is important that the workshop participants are aware of the results of those surveys at their organisations.
- As a result of the implementation of the gender equality plans, some changes may have been made at the partner organisations and others may be envisioned for the future. It is important that the partners bring this information with them, too.

Workshop contents and didactics

The workshop will last from 9:00 to 13:00 with a break of about 20 minutes.

The workshop will be split in two blocks:

- Implementation of gender equality plans; method: knowledge café (see: https://en.wikipedia.org/wiki/Knowledge_caf%C3%A9)
- On-site visits; input, exchanging experiences and discussion

Block 1: Knowledge café on the implementation of the gender equality plans

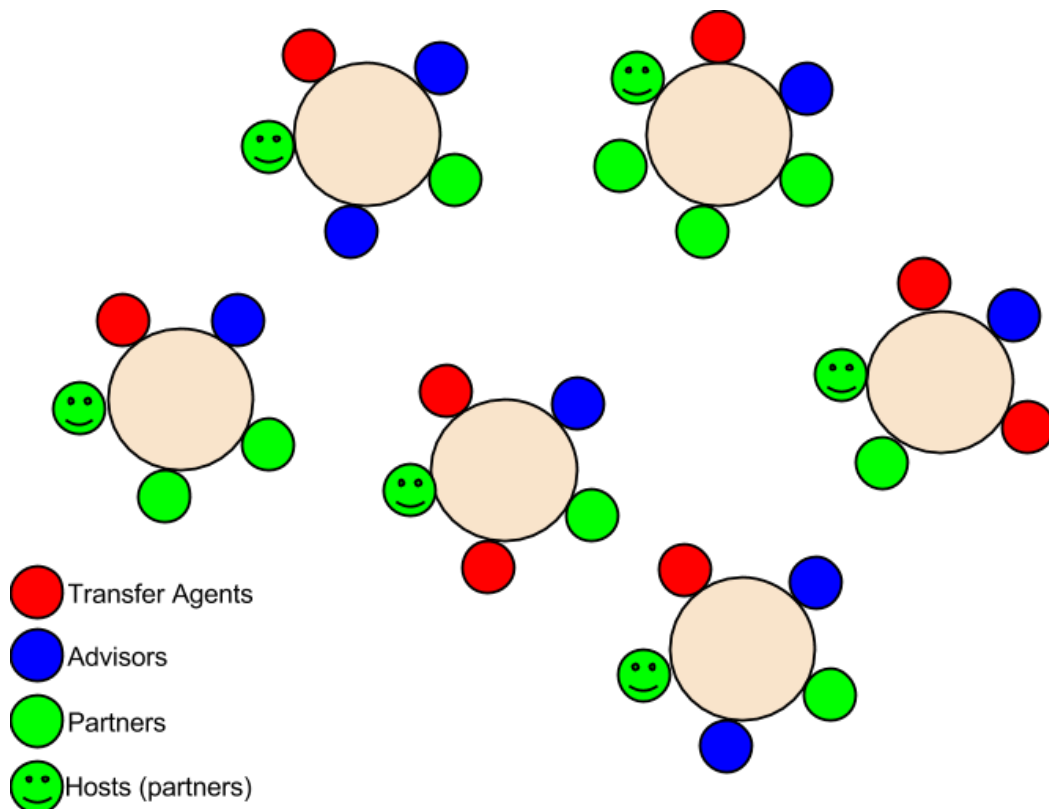
The first block will address the implementation of gender equality plans in all participating organisations. The participants will be distributed across 5-6 tables (depending on the final number of people attending the workshop) and will work for 2 hours on the following issues:

- What was the impact of the originally designed gender equality plan so far?
- What changes have been made in my organisation and how have we implemented them?
- What changes do we intend for our organisation and how do we plan to implement them?

- What other changes could be implemented in our organisation and how could they be implemented? (It is in this part of the discussion that we think the multipliers can provide their expertise to the participating organisations with.)

As it corresponds with the method of the knowledge café (or world café), participants will be distributed across several discussion tables. Each table will be hosted by a member of the project team (“partners”) who agreed on this role prior to the meeting, who will be prepared for this role and give continuity to the discussion at the respective table. The time of work will be split into 2 rounds where all participants but the host will migrate to other tables. The final part of the knowledge café will be devoted to draw conclusions at each table and share them with all participants (this means extending the discussion to the plenum).

A suggested distribution for the different types of participants could be the following:



Block 2: On-site visits

The second block will address the cross-organisational knowledge transfer and will be focused on making use of and planning further on-site visits. At the time of the workshop some on-site visits will have been already made and some online discussions about them will have been already held between the partners. This block will first present an input about knowledge transfer and on-site visits (within the consortium and beyond), then will guide through exchanging experiences from on-site visits of partners and finally offer a possibility to discuss further plans to exchange knowledge via on-site visits in the next months/years (based on common interests and discussions from Block 1):

	Host organisations:						
Visitors:	Orga. 1	Orga. 2	Orga. 3	Orga. 4	Orga. 5	Orga. 6	Orga. 7
Orga. 1							
Orga. 2							
Orga. 3							
Orga. 4			Planned visit (date, persons)				
Orga. 5							
Orga. 6							
Orga. 7							

Time schedule

Introduction, explaining the setting: 15 min.

Block 1: 2x30 min. working time
 2x10 min. for conclusion
 25 min. sharing with all participants
105 min in total

Break: 20 min

Block 2: 30 min. input about knowledge transfer and onsite-visits
 30 min. sharing of onsite-visit-experiences with all participants
 30 min. planning of future on-site visits
90 min in total

Summary and outlook: 10 min

The third knowledge transfer workshop (year 3): exchanging knowledge with experts

As a preparation for the workshop, please fill out the tables in chapter "Collection of knowledge transfer activities", regarding:

- section 1 about the knowledge transfer actors (these is especially important so that we know who your transfer agents were/are)
- section 2.4 about on-site visits at "other" institutions (outside the project consortium)
- section 2.5 about further multiplying activities (networking activities with similar gender equality implementation projects, etc.)

The aim for the third knowledge transfer workshop is to share experiences in these fields, learn from another, and discuss further strategies for the last 1.5 years of the project in order to maximise the impact of of the project. Additionally these issues will be discussed during the Graz meeting with external experts (we suggest 2-3 experts from gender in academia and gender in other research organisations) who will also participate in the workshop.

Workshop contents and didactics

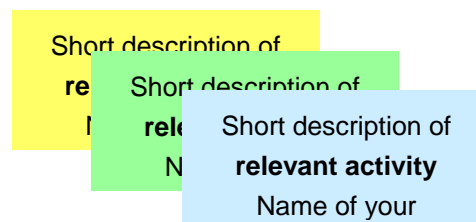
This is a hands-on description of the knowledge transfer workshop including needed time, participant-settings and material to exchange collected knowledge from the chapter "Collection of knowledge transfer activities".

Reflections within institutional teams (10 min):

Please discuss with your colleagues about the knowledge exchange activities you carried out so far and select the 3 most relevant activities, in terms of impact:

In your opinion, with which 3 activities could you accomplish most in regard to transferring knowledge, raising awareness, buying-in commitment, building (strategic) relationships changing practices, etc.?

→ Prepare one card for each activity:



Sharing experiences and discussing recommendations in 3 mixed break-out groups (45 min):

Each team member takes one card and gets together with others with the same coloured cards ("yellow group", etc.).

One of the invited experts should be moderator and pay attention to using the 45 min. equally for the following tasks:

- a. Everyone with a card tells shortly the "story" behind this activity, why it became relevant and how it achieved a certain impact.
- b. All group members try to identify common and distinctive features of the exemplified knowledge transfer activities: What are similarities? What are differences?

- c. Formulate recommendations: How can we reach a good impact with our knowledge transfer activities? What has worked well?
→ Prepare 1 flip chart with your results (focus on recommendations) and decide who will present the group results in the plenum.

Plenary discussion (30 min)

Each group has ca. 5 min. to present their results (flip chart with recommendations).
Discussion of all results within the plenum.

The final knowledge transfer workshop (year 4): exchanging knowledge with stakeholders

Stakeholder Mapping

Please indicate the 10 most relevant stakeholders for the final knowledge transfer workshop :

Priority nr.	Stakeholder (SH) Name	Category (Policy; research funding; academia; industrial research; NGO; gender expert)	Benefits for the project (reasons to involve the SH)	Benefits for the SH (SH's motivation to involve)	Estimated level of interest of the SH (low/medium/high)	Weblink	Contact

The priority ranking should be based on benefits for the project AND the benefits for the stakeholder (as these increase the probability that invited stakeholders will actually attend).

Didactical design of a stakeholder workshop

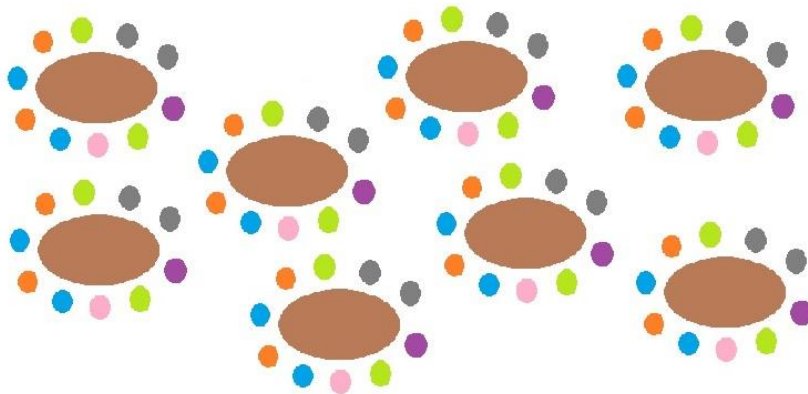
The stakeholders in all partners' tables will be assigned to one of the four categories:

- *Policy*
- *Academia*
- *Research funding*
- *Other research organisations*
(NGO, industrial, networks, ...)

The workshop architecture is based on ca. 5-7 stakeholders per country.

First round „Good practices and hurdles of gender equality in academia and research in national contexts”

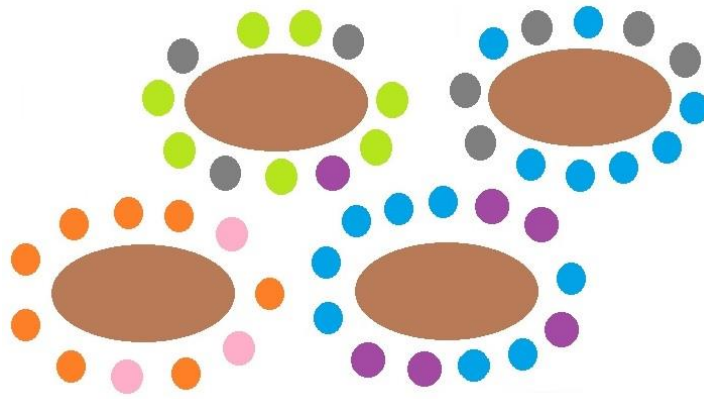
In this phase “success stories” from your gender equality implementations can be included. Furthermore general hurdles and good practices of gender equality will be discussed in national groups (stakeholders + project members + transfer agents). This gives national stakeholders the possibility to speak in national languages and discuss within a group, where all share the same legal context.



Graph 1: Setting of tables with invited stakeholders and workshop participants in national groups

Second round „Practices in details and discussion of innovative solutions”

This topic should be discussed by persons within similar sectors/groups across countries (policy makers, gender scholars, gender equality officers/human resource managers in academia etc.) and can include results from the gender equality implementation project (successful instruments etc.).



Graph 2: Setting of tables with invited stakeholders and workshop participants from similar sectors

Third round: “Reporting and collection of results”

From each table in round two one rapporteur summarises the most important points and brings them back into the plenary group (discussion results can be either collected with cards or written on flip charts during round 1 and 2).

The final result can be four short papers for the different stakeholder groups, with a short section about the status of gender equality in science and research and an emphasis on innovative solutions for the respective sector of the stakeholder group. By discussing the very issues with the concerning stakeholders, it should be granted to use “their language” and focus on most relevant aspects for their field of work.