



**Quality in Gender+ Equality Policies  
Integrated Project**



**OPERA Final Report**  
**Advancing Gender+ Training in Theory and Practice**

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## Foreword

This deliverable has been designed to provide not only a comprehensive and yet synthetic report of the OPERA activity. It also aims at exerting self-reflexivity about the achievements, difficulties and perspectives of this essential, albeit specific, part of QUING. Indeed, OPERA engages with one of the most challenging issues of contemporary (funded) social science: making sense of empirical results and theoretical inputs for a larger public, beyond the academic circle, and transferring knowledge into (public) action. This challenge entails a number of questions and potential pitfalls, including oversimplification or the transfer of fine-grained, empirically grounded, but hardly applicable analyses, recommendations and instruments. Although those are common to a number of disciplines within social sciences, it poses specific problems as regards knowledge on gender, which engages with self-perceptions, intimacy, beliefs and stereotypes, potentially less subject to change, thus making difficult straightforward and single-varied analyses and conclusions. It is also especially complex within the frame of an extensive comparison at the European level, since taking into account the increased diversity among 29 countries or from a policy issue to another (Gender Base Violence, Intimacy, Gender Equality Policies and the policies of non-employment) is likely to produce a fine grained, in-depth overview of the differential policy treatment of the afore-mentioned issues, which makes empirical outputs difficult to translate into simple, easily applicable recommendations.

However, QUING attempts to fully engage with that situation, operationalizing its empirical findings through a relatively new, but promising activity: Gender(+) training. As shown in the justification of the project, there are evidences that in the recent years, training has become one of the most praised strategies to support a better implementation of Gender mainstreaming and producing actual changes in European countries. Drawing upon knowledge transfer theory and experiences from specific fields such as Gender& Development, Gender training is thus a fast growing activity in some European contexts, as it offers a potential for effective policy and social change, through the training of a number of actors (policy makers, civil servants, trade unionists, researchers...) with very different levels of knowledge and consciousness on gender inequalities. Although promising, this development which takes place in the windows of opportunity opened at the EU and the domestic levels by the expanding legislation and institutional machineries in charge of ensuring gender equality nonetheless constitutes a problematic issue in itself. Indeed, this potential very much depends on the quality of gender(+) training, on the use of high quality standards as regards the methodologies and the content of trainings, as well as the quality of the theoretical and empirical frames mobilized by trainers. It also depends on the use of self-reflexivity, the discussion and diffusion of good practices and ultimately the definition of (shared) minimum quality criteria. Therefore, in QUING, gender training is understood both as an avenue for transferring knowledge into practice, but also as an open empirical question that made necessary to question contents, methods or standards, but also, more substantially, the understanding of gender inequalities articulated in gender (+) training activities or their degree of inclusiveness as regards other factors of inequality.

For these reasons, OPERA included a reflection on the transferability of empirical outputs into recommendations for "quality" training, but also a broader reflection on the professionalization process of gender+ training. This double-edged approach led to carry out pilot training activities, to think about the definition of standards of curricula and quality criteria, but also to the potential contribution of QUING to the institutionalization of a profession in the making. These two levels are reflected in this report, where the different steps taken towards the mainstreaming of quality criteria, especially as regards the inclusion of other inequality strands than gender, and the quality of the diagnostic on gender inequalities, are framed within a broader enterprise: drawing upon QUING and OPERA research to contribute to the making of a European Community of (good) practices in gender+ training.

## Structure of the OPERA Final Report

The present Final Report thus attempts to fully engage with the implications that arise from the statement that OPERA is ‘the most important activity in QUING’ (see: description in the full annex) as it ensures that the knowledge generated in the four other QUING activities is operationalized and translated into methods that can be used to enhance the quality of gender+ equality policies.

Therefore, we intended to make this report more than a thorough assessment of the activities carried out and of the concrete outcomes that have been achieved. We intended it to be also a support for self-reflexivity, especially as regards the pitfalls or deviations encountered in the implementation of OPERA, and our contribution to the theory of (Gender) knowledge transfer in general, and gender training in particular which, we argue, might go beyond the initial objectives ascribed to OPERA.

As such, this report draws out the logical connections that exist between the contribution of OPERA and the definition of curriculum and quality standards (a), the circulation of knowledge from the academia to the gender expertise (including gender trainers) but also from the practitioners to the academia (b), and to the current process of professionalization and accreditation among the gender+ training “community” (c).

This report also includes a more prospective dimension, which aims at ensuring the sustainability of OPERA outputs through different channels:

First, it reflects the steps taken within OPERA towards the mainstreaming of minimum quality criteria among Gender+ Trainers, with a specific attention for the inclusion of diversity issues.

Second, it emphasizes the role to be potentially assumed by the gender trainers’ database for the circulation of ideas and the mainstreaming of “practices with potential”, and provides some conclusions regarding the issues of its transfer to a high quality partner and of its future maintenance.

Third, it advocates the making of a Community of Practices and practitioners as the appropriate means to support a bottom-up process of accreditation in gender+ training activities, and the best guarantee for the quality criteria developed by OPERA to be taken into account and further developed.

Fourth, it presents, in the form of a Declaration on Gender+ Training in Europe, a Mission statement expounding the basic criteria of quality and content to be advocated in Gender+ training activities in Europe, in order to fully assume their role in the improvement of Gender+ Equality policies.

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## Part I. A narrative of OPERA activities

### 1. The initial Objectives of OPERA

This section recalls the initial diagnosis stated in the full annex, which underlines the lack of transfer of knowledge between academia, policy makers and politicians, as a negative feature for the quality of gender+ equality policies. OPERA was thus designed to actively contribute to fill this gap through the use of training, considered to be the most promising avenue for knowledge transfer. Section 1 details the major objectives of OPERA in the field of gender+ training, from the definition of “more inclusive” standards, to the strengthening of those activities through the use of self-reflexivity and the development of quality criteria.

#### 1.1 **Mission statement: ensuring the transferability of QUING knowledge to policy making**

##### *Diagnosis*

In the Full Annex that details the major objectives, work packages and the methodology of QUING, the OPERA component is given specific relevance, as it aims to articulate the empirical outputs of QUING and more generally, the knowledge acquired during the full duration of the project, with a more prospective and implementation-oriented mission statement. This mission statement draws upon the diagnosis that despite “*the growth and success of gender studies in Europe, and the activities of some excellent networks (such as AIOFE, Athena and more recently, At-gender) there is still a problem with the transfer of knowledge between academia and policy makers and politicians*”, to be mainly attributed to the problems of these networks to attract policy-makers to their audience. Although not detailed in the full annex, this lack of transfer is mainly to be understood as the outcome of the insufficiently transferable content of gender research as a whole, due to the variety of theoretical and methodological standpoints, and to the lack of clearly stated recommendation and fully operational contents. This is the main reason why OPERA was thought to be “*the most important activity in QUING*”.

In this activity, the knowledge generated in the other activities of QUING (LARG, STRIQ and WHY) was expected to be made operational and translated into methods that would be used to improve the quality of gender+ equality polices and gender mainstreaming strategies in the nearest future. Drawing upon one of the core idea of FP6 – Knowledge has to be made public – OPERA was thus designed to actively transfer knowledge directly into the field of policy making and implementation, through the use of a blossoming, yet still in the making activity: training. As stated in the Full Annex, following examples in Northern Europe, many political institutions, administrations and organizations hire experts to give gender training, including to the highest institutional level. Yet, no systematic information could be provided at the time QUING was launched, and therefore, in its original mission statement, OPERA could only draw on a list of examples. Those tended to identify gender training as one of the most fast-growing methods for supporting gender mainstreaming strategies in Europe. The underlying idea of this diagnosis was that gender mainstreaming strategies often led to a dilution of means and meanings, by which the very justification and objectives of gender equality strategies are being lost at the same time they are mainstreamed among a plurality of actors. In this context where gender equality strategies are subject to a loss of substance and efficiency, gender training can offer innovative and promising prospects in terms of knowledge diffusion, awareness-rising, implementation enforcement, etc. Such training can involve “*the transfer of knowledge on gender relations in a certain context, the transfer of knowledge about gender mainstreaming and gender mainstreaming tools, the transfer of knowledge on laws and regulations in connection to gender relations*”. According to the initial premises of QUING as regards the developing field of gender training, there were no public material on curricula available, and a venue where to discuss and develop the curricula that are actually used was still missing. More generally, as

developed in the Full Annex, a “*general lack of exchange of ideas, hindering self-reflexivity of trainers, further development, improvement and quality assessment*” was also to be reported.

Another point that was made clear in the original OPERA mission statement was that gender training is becoming a highly competitive field of intervention. A field where the growing supply by recently established commercial companies and larger companies or services that previously developed other fields of expertise such as human resources, consulting and life-long learning, is likely to undermine the position of gender (academic or non-academic) experts, possibly to the expense of a structural and both empirically and theoretically grounded analysis of gender relations. The main impetus for such a development mentioned in the full annex, was the pro-active role exerted by the European Union (EU), whereas domestic developments in the form of innovative and far-reaching legislations or complex gender equality plans and machineries, were left unexplored. The diagnosis posed by QUING also pointed to the role to be assumed in the nearest future by the European Gender Institute, as it counts among its prerogative an interface role “*between civil society, academia and policy making*”. Therefore, its mandate was expected to include promoting tools and indicators for gender mainstreaming activities in Europe, and to open channels for an ongoing diffusion of information and debate in the field of gender issues, which all together was “*expected to improve the now fragmented character of gender expertise in policy areas*”. Although the establishing of the European Institute on Gender Equality (EIGE) took almost the full duration of QUING to be fully implemented, it remains that the contacts established between the EIGE and OPERA in the last stage of QUING, point to the predictive dimension of this prospect, and underline the relevance of the argument that makes of the EIGE a tool for bringing together the fragmented information on gender training activities in Europe (see also: Part III of this report).

### *Methodology*

As standards for gender+ training to be developed in OPERA needed to take into account up to date knowledge on gender (in)equality, on the mechanisms and structures that are important in its reproduction, and on the various policy approaches towards gender+ equality, the content of the training standards should take on board not only the state of the art of gender theory and empirical research on gender relations in Europe, but also make extensive use of the knowledge generated in the four other activities of QUING (with a specific emphasis placed on LARG, WHY and STRIQ). STRIQ was, from the beginning, conceived as one of the most transferrable component of QUING in terms of training, as incorporating knowledge on the intersection of gender with other inequalities, new on the voice and standing to be given to civil society and the variety of gender+ equality policies and on typologies of gender regimes and gender equality policies, was expected to provide key insights to the reflection on gender “+” training standards and curricula. In the development of the training methodology, the experts meetings and the pilot trainings to be held during the duration of QUING were understood as a tool for ensuring the goodness of fit between the developed training standards and current practices, and also for ensuring that existing good practices would be taken on board. Last but not least, the original mission statement of OPERA made clear that since training is an activity that necessarily draws upon self reflexivity of trainers, this principle was first to be enforced within the OPERA team, also as a tool for periodic internal evaluation.

### *Innovations*

Whereas the main expected results and recommendations are briefly discussed in the following sub-sections, it is important to remind that OPERA was designed to be innovative, especially in that sense that it would provide a much needed state of the art on gender+ training activities, some guidelines for quality training through the definition of standards and the greater inclusion of other inequality strands than gender. This attention should also include a reflection on the participation of civil society, as a tool for supporting the greater concern of public policies for active citizenship. Indeed, it was through the establishment of standards for gender training that are inclusive of other inequalities and that take into account current deficiencies of gender+ equality policies, that QUING was expected to have a

major strategic impact on the improvement of the quality of gender equality policies. The recommendations that to be delivered were supposed to enable gender equality policies to be more effective and better adapted to the diversity of Europe.

More generally, the major innovations in this project were to be related “*to its theoretical understanding of citizenship and its understanding of inequalities in connection to policies, to its methodology, to its scope and the range of the data gathered, to the new policy relevant instruments that it will generate and to the composition of the project team*”. Since the missing dimension in traditional approaches to citizenship was the attention for the institutional opportunities that are giving voice to citizens, and to the degree to which policy making is actually giving voice and ‘standing’ to certain categories or groups of citizens, QUING and OPERA have relied on such a conception of citizenship, thus aiming to a full understanding of the relationship between active citizenship and institutional arrangements. Moreover, through the assumed focus on political intersectionality “*as the way different inequalities are dealt with in connection to gender inequality*”, QUING aimed at producing new material for the development of theories on intersectionality and new ideas for the development of gender equality policies that are inclusive in their attention towards other inequalities. From this point of view, potential synergies between STRIQ and OPERA were believed to be crucial.

#### *Bridging the gap with policy making*

As part of the original mission statement, OPERA was also understood as a tool guaranteeing the transferability of QUING outputs into the improvement of the quality of Gender+ equality policies in Europe. This objective is rooted in the commitment of QUING towards bridging the gap between academics and policy making, by “*starting from theory towards concepts, tools and expertise that is relevant for policy makers*”. QUING was thus designed to contribute to policy development at least through 2 dimensions: by generating knowledge on multiple inequalities and its implication for policy making, and by understanding how civil society can actively participate to policy making. Within this broader frame, the OPERA activity and “*especially its emphasis on training, training standards, curricula, and student monitoring and self-evaluating systems*” was meant to improve the overall quality of policy making through tutorial activities for policy actors and knowledge transfer. Through OPERA, gender+ training was thus conceived as a potentially efficient means to mainstream the knowledge developed through the other streams of QUING. Fostering the development of quality standards and strengthening the ties between gender+ training activities and gender research was therefore linked to the diffusion of an empirically grounded knowledge and a critical assessment of gender and other discrimination policies in Europe. Their degree of inclusivity, the quality of the diagnosis or the consistence between the framing of a policy issue and the solution to be implemented, were among the criteria questioned throughout QUING, which should also be taken into account to develop better designed training curricula.

Moreover, the both extensive and intensive knowledge developed by QUING, which draws upon first hand material collected in 29 European countries on a variety of issues, was thought to provide quality gender+ training with a large and comprehensive of analytical data, for the purposes of demonstration, context-setting or exemplification. Consecutively, OPERA team members were soon encouraged to fuel their potential training activities within, but also outside QUING, with QUING outputs. More generally, since OPERA was developed as a tool for improving the quality of public policies across Europe, and since QUING was designed to comprehensively assess their actual state at the domestic level, and the potential shortcomings, limitations or pitfalls those may entail, OPERA featured as the very operationalization of QUING.

## 1.2 *Enhancing the quality of training through inclusiveness and self-reflexivity*

The above-stated long-range objectives of the initial mission statement were to be fulfilled through the articulation of medium-range objectives, such as the definition of more inclusive standards for gender+ training, and the development of self-reflexivity.

### *Defining more inclusive standards for gender+ training*

As QUING was expected to “*contribute to the further quality of policymaking on gender in a multicultural context by providing high quality standards for the training of civil servants*”, the issue of what makes such standards of “high quality” was given specific attention, and led to place the emphasis on inclusiveness.

Thus, defining more inclusive standards for gender+ training activities has been ascribed as one of the main objectives of OPERA (Full Annex: p. 16). By inclusiveness, we understand two main aspects:

- The capacity of a training to tackle complex situations of inequality and/or discrimination, which entails rooting the training into gender theory and empirical studies in order to support it with a complex understanding of power structural relations at stake.
- The attention paid to intersecting inequalities.

While the first aim was to be achieved through a reflection on the economy of knowledge transfer between gender studies and gender+ training, the second meaning given to inclusiveness corresponds to the reflection carried out on multiple inequalities throughout the QUING project. Whereas STRIQ, and to a lesser extent, LARG and WHY, had to engage with the theoretical and methodological puzzle of addressing and conceptualizing multiple discriminations, OPERA had to transfer this knowledge into curriculum standards for gender+ training that pay greater attention to intersecting inequalities.

As underlined in D65 (*Guidelines for Curricula Standards for Gender training*), “*integrating the concept of intersectionality in gender+ trainings highlights the importance of understanding and reflecting on multiple inequalities and multiple discriminations*”. The analysis of contemporary training manuals for gender and diversity trainings within the context of international organizations like the European Commission or the United Nations carried out as part of the initial state of the art for OPERA, has shown that ‘intersectionality’, was rarely explicitly referred to in the training field. Besides, the fast-growing field of “diversity trainings”, was described as still lacking theoretical foundations. Therefore, the challenge was to operationalise intersectionality theory while at the same time avoiding simplifications which possibly result more in exclusion than inclusion. As part of this reflection, it has also been soon emphasized that the question of what intersectionality is cannot be answered in a quick and easy way because there is no broadly accepted definition or concept of intersectionality. For the last 20 years, intersectionality has been addressed and theorized in the field of feminisms and gender studies, critical race studies, queer studies and disability studies. The term was coined by the US American legal scholar Kimberlé Crenshaw, who understands intersectionality as different lines of identity that produce multiple forms of discrimination.

Whereas STRIQ was developing the contribution of QUING to the analysis of the latter, OPERA requested some operationalisable definition of intersectionality for the purpose of training activities, in order to provide recommendations for commissioners on how intersectionality can be included in all aspects of the gender+ trainings. The goal was to understand interlocking types of discrimination and to provide tools to analyze policies as to whether or not they take intersectional inequalities into account. The “+”, as an integral part of gender+ competence acquired during training activities, reflected this commitment towards greater inclusiveness. The successful inclusion of intersectionality into the training was therefore linked not only to the theoretical content, but also to the

variety of training methods used and to the distributed material. Integrating intersectionality into training curricula thus entailed a number of theoretical and practical issues, such as the communicability of a complex and fragmented theory, the cognitive and emotional processes and dynamics taking place in the training programme or the role of the commissioners in determining the degree of integration of intersectionality in a training session.

### *Fostering exchanges and self-reflexivity*

Last but not least, since it aimed at bringing together different communities (academics, gender experts, trainers, commissioners and policy makers), OPERA was conceived as an on-going process of mutual learning. Within QUING, this dimension meant to foster exchanges and synergies with other streams, through the organization of internal workshop and communication activities. It also entailed the need for in-depth exchanges between academics and experts of different backgrounds within the OPERA team itself. To this respect, the contribution of the Yellow Window partner has been key to provide continuous feedback on training experience, and counterbalance the inclination of academics for theory-oriented discussions and top-down learning processes, to the expense of more experience-driven and bottom-up approaches.

Additionally, with the above-mentioned communities, OPERA was expected to develop as a forum for open discussions, in order to identify the needs of trainers, commissioners and academics as regards the development of quality gender+ training curricula and the diffusion of good practices, and to confront different experiences, contexts and practices among the members of a community still in the making.

## **2. Implementing OPERA**

Section 2 exhaustively expounds the different steps in the implementation of planned OPERA activities, starting with the brief description of the workshops targeted both to OPERA team members and to the gender+ training community. Then it summarizes the timeline and contents of the submitted deliverables, and provides an assessment of the training activities carried out during the lifetime of the project. Lastly, it introduces a review of the final conference held in February, 2011.

### **2.1 OPERA workshops: timeline and description of content**

OPERA workshops have been held under WP25, as part of the management of the OPERA activity. This WP consisted of 5 workshops to be carried out between month 18 and month 46, including 3 preparatory or intermediate workshops, a Workshop on Gender+ training curricula meant to finalize standard curricula and to discuss how to link OPERA to other QUING results, and a final workshop to evaluate the final training activities, curriculum and standards and start developing a final report for the OPERA activity. In addition, WP30 listed 5 main objectives, to be tackled in D65 (formerly D53) and in 2 reports due for the beginning of the last management period (D57 and D58; formerly D67 and D68):

1. to develop methodology, contents, and didactic guidelines for curricula
2. to elaborate minimum quality training standards
3. to produce a student monitoring evaluation system
4. to develop a typology of different standards to apply to different categories of target groups
5. to produce a manual for gender trainers

Two workshops held in Madrid and Budapest, respectively in June and early October, 2009, intended to address these 6 main objectives in a cumulative effort to produce both curriculum standards and to elaborate content and guidelines for future manuals targeting gender trainers. One of

these workshops was the result of the synergies built with TARGET<sup>1</sup> (see: Part III, Section 1), and was completed by a QUING workshop held in Budapest. The first of these workshops originates in the TARGET project of which the UCM was a partner (under the responsibility of Emanuela Lombardo). The TARGET Expert meeting on Gender+ Training: towards minimum quality criteria' was thus held at the University Complutense of Madrid on 12-13 June 2009 and organised by the UCM partner. The objectives of the seminar were policy oriented as the aim was to bring the experience gathered in the previous TARGET meetings to discuss quality criteria for gender+ training (G+T) for policymakers, politicians and public administrators. Rather than limiting the focus to quality criteria of curricula, it expanded the focus to different aspects of Gender + Training, including not only curricula, but also methodology, expert networks, relations between trainers and commissioners, monitoring and evaluation.

It aimed at discussing G+T good practices or - as Susanne Baer (QUING HU team, also part of TARGET) called them, 'practices with potential', and sought to draw minimum quality criteria from such practices which might be useful for thinking about the general design of gender+ equality training. In this respect, the expert meeting held in Madrid complied in particular with the main objective of WP25, as well as objectives 1, 2 and 4 listed above as regarding WP30, that is: to develop methodology, contents, and didactic guidelines for curricula / to elaborate minimum quality training standards / to develop a typology of different standards and to apply to different categories of target groups.

The second workshop was held on October, 2, 2009, as a part of the QUING final Conference organized in Budapest. It constituted an attempt to mainstream the reflection on the "OPERATIONALIZATION" of QUING results beyond OPERA team members. The reflection was shaped around four questions and mainly experience-driven, drawing on the personal experience of QUING researchers in the field of gender + equality training.

Finally, a third workshop was organised in November 2007 as part of the 'Dynamic Cities need Women' conference that was held in Brussels and in which three OPERA partners participated: Lut Mergaert from YW, Mieke Verloo from RAD, and María Bustelo from UCM. In a specific workshop dedicated to the discussion of the QUING project, the partners presented the findings from the survey with commissioners, discussed first identifications of what is a good practice in gender+ training, as well as issues such as resistances to G+T, objectives of G+T, dealing with other inequalities, and methods and techniques. Overall, this early workshop catalyzed people's attention on the OPERA project and enabled partners to clarify a number of issues that would be further developed in future expert meetings.

These workshops, which much differed in terms of audience, methodology, scope and duration, nonetheless illustrate two of the strength of OPERA: its openness towards synergies built with other networks reflecting on gender+ training, in a cumulative effort to enhance the overall quality of these activities at the European level, and its commitment towards the greater inclusion of the whole QUING community, through the sharing of experience and the internal circulation of data.

#### ✓ **Curricula Workshop: "Gender+ Training: towards minimum quality criteria" (month 33)**

##### *Location*

This workshop was held in Madrid, and organized by the QUING and TARGET UCM teams.

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<sup>1 1</sup> The TARGET (Transnational Applied Research in Gender Equity Training) project is funded by the European Commission through the EU-US Atlantis Program. The project was held from November 2007 through November 2009, being all the European partners in that project also OPERA partners (Complutense University, Radboud University, and Humboldt University)

## *Participants*

The Madrid expert meeting put together G+T trainers, commissioners, and academics to discuss quality criteria on G+T from their different perspectives. All participants, originating from Continental Europe and the United States, were experts in G+T and gender+ equality policies, though each had a specific knowledge on some aspects of G+T more than others. In total 32 participants met for two days to debate on gender+ training. The workshop devoted a particular attention to the exchange between G+T trainers, commissioners and academics from Spain and trainers and academics from other parts of the world. To this aim, simultaneous translation English-Spanish-English was provided, and all written information (abstracts, methodology, questions) was translated into both English and Spanish.

## *Structure and methodology*

The two-days workshop was structured into the following 6 sessions: Session 1: Gender+ Training Curricula; Session 2: Gender+ Training Methodology; Session 3: Training Trainers and Building Expert Networks; Session 4: Working and Negotiating with Commissioners; Session 5: Monitoring and Evaluation in Gender+ Training; Session 6: Conclusions: towards minimum quality criteria on G+T; Evaluation questionnaire (see files with Program of the seminar, Questions, and Evaluation in the Annex).

Each session was organised around short presentations (10 min max) to start off the discussion, comments by specific people (5 min max), and plenary debates. Presenters were asked to discuss practices of gender+ training that have a potential quality or to focus on more theoretical reflections on quality criteria for G+T. Discussants were asked to help with their comments to reflect on what are the quality aspects of the training experiences presented and why are they to be considered training 'practices with potential'. Plenary discussions aimed at identifying and possibly reaching some consensus on minimum quality criteria for G+T. Short abstracts (1-2 pages) of the presentations and participants' suggestions of background readings were collected and circulated among participants before the seminar to enable a more focused discussion and to give some elements to the discussants on how to structure their comments. The conclusion session was structured into small groups, one focusing on each session, where participants reflected on the minimum quality criteria that could be drawn for their issue, and then plenaries to report the work conducted in the small groups. Building up synergy between the main objectives of TARGET and OPERA, the UCM team prepared a number of questions to discuss in the 5 sessions of the seminar, which were distributed to the participants some time before the seminar. This enabled participants to prepare some reflection so that the seminar itself could be more focused on G+T quality criteria.

## *Session on G+T curricula*

The session on G+T curricula started from three premises that emerged in other expert meetings: gender training works better when it is embedded in a broader gender equality strategy; the context where trainings take place matters; there are different types of gender + training according to audience /goals. The main ideas that emerged in the debate were that there are at least four different types of G+T (or steps in a curriculum), each of them with its own specific goals and knowledge or skill requirements: Basic awareness training, Gender analysis training, Gender equality strategy training, Training Trainers. Moreover, although equality can mean many different things in different contexts, the understandings of inequality as a process and their mechanisms can travel across different contexts. Therefore, another point of the discussion was that a quality criterion for the content of a G+T curriculum is the structural character of inequalities. Understanding the structural quality of inequality as a process is a key content of G+T. It enables to recognize that stereotyping is an inequality process rather than generating stereotypes oneself. Finally, it was highlighted that a training should be related to certain body of knowledge (gender theory) , avoiding simplified version, or falsely universal understandings of gender through training, but also contemplating the possibility to reshape

the most advanced gender theories so they can be communicated to the larger public of the training. Besides, it could include how power enters into the deconstruction and reconstruction of ideas and beliefs. In some contexts, like Italy, training is based on personal development and identity building which is the way in which examine our own experience and transformation (autobiographical methods) and interrogate one's personal life through gender lenses.

#### *Session on G+T methodology*

In the session on G+T methodology, the premises from which we started were an interest in discussing methodology rather than specific techniques, and secondly, that participatory and experiential methodologies offer greater training potential, and that a training methodology should assess existing resistance to gender+ training and develop strategies to deal with resistances. While resistances to G+T were addressed in terms of power relations, participation model, breaking conventions, creating communication and knowledge and through the discussion of time as a (scarce) resource for gender trainers, participatory techniques was discussed with respect to their potential for producing change in participants and experiential methodologies in the light of their contribution to the collectivization of knowledge.

#### *Session on Training trainers and building expert networks*

The main issues discussed in this session revolved in particular around a threefold process: 1) theoretical-practical training, where we reflect on what do concepts mean in our work context; 2) training-action, with the tutorship of expert trainers, to work with tools and tricks that you only learn by practicing (for instance how to deal with conflict). The tutorship can be for a year, until the trainee gets self-confidence. 3) Meetings on group self-reinforcement to get improvement. It has been emphasised that different audiences required different knowledge and skills because they have different expectations about training, and that defining what is the place of training within the whole strategy of the organization was key for a successful training. As regards building expert networks, the discussion introduced Community of practices as a support for on-going professional training and a tool that facilitates the access to knowledge; gathers experiences; gives options to deal with new situations and learn; fosters the exchange of new ideas; broadens the boundaries about what we know from a theoretical and a practical point of view. Discussions also pointed the need for building supportive networks or effective change networks rather than "expert networks", and the fact that gender knowledge is in itself a life-long learning process that needs to be dynamic and constitutes good way of thinking about self-reflexivity.

#### *Session on working and negotiating with commissioners*

In this working session, the main issues usually entailed by negotiation with commissioners as space, time, profile of trainees, and hierarchy of the group or the (non)negotiable aspects of the training have been discussed. The roles of the sectorial, legal and institutional contexts were also discussed, as well as the importance to share the responsibility of the (un)successful training with the commissioners.

#### *Monitoring and evaluation in gender+ training*

While most trainings are not organized as part of a long-term strategy, it was underlined that there is a need of monitoring that tracks impact from training to action. Besides, the different purposes of evaluation were extensively discussed in that session: for improvement, for accountability, and/or for enlightenment. The issue of monitoring compared to evaluation was also discussed, particularly in relation to long term impact.

✓ **Workshop on the operationalization of QUING results through OPERA (month 37)**

*Location*

This workshop has been held at the Central European University of Budapest.

*Outline*

Before the official launch of the conference in Budapest, a 2 hours OPERA meeting had been scheduled on Friday, October 2<sup>nd</sup>, 2009. The aim of this meeting, open to all QUING researchers, was to think collectively on how OPERA-tionalizing QUING findings, with a special emphasis on training activities. The emphasis was put on individual experience of QUING researchers in transferring knowledge developed within the frame of QUING from the analytical to the practical level. For the purpose of the meeting, 4 broad questions were submitted to the audience. Considering the specificity of your own context, what QUING findings could be more fruitfully operationalized? This working session firstly aimed at drawing insights from context-specific experiences that can be applied to elaborate curricula and typology of standards according to different target groups, and involving QUING researchers in a reflexive assessment of the potential of operationalization of QUING.

This workshop led to emphasize that QUING data could provide thorough information, especially when there is a tendency in certain contexts to apply a “totalising” focus on gender equality, meaning not going into specifics of contexts and institutions, but also that findings of QUING frame analysis should be shared with civil society, as they are very useful to support argumentation. This entailed in particular those QUING findings as regarding the non-consistency of gender policies. This workshop was also an opportunity to collectively assess the pitfalls and limitations in efficiently transferring knowledge into gender+ training activities. The need to build capacities among QUING team members to adapt to different contexts of training was highlighted, just as the necessity to develop a language of QUING that is understandable to people outside our community. It has also been stressed that QUING findings could strengthen the position of certain actors in their struggle during the policy making process. This included practitioners, consultants, trainers, equality agents, equal opportunity offices in universities.

✓ **Final OPERA workshop: reporting on the training experience (month 46)**

*Localisation and context*

The final OPERA workshop took place in Madrid on the 16<sup>th</sup> of June, 2010, along with an OPERA team coordination meeting mainly devoted to planning the OPERA final conference.

*Outline*

In line with the objectives outlined in the full annex, the main objectives of the meeting were to evaluate the final training activities, curriculum and standards and start developing a final report for the OPERA. In addition, taking into account previous updates in the OPERA implementation plan (see, in particular: D57), this workshop was also an opportunity to adopt a more reflexive perspective on what has been accomplished and the remaining challenges to be engaged with during the final conference.

First, it offered an opportunity to provide a preliminary assessment of the final training-the-trainers activities, in the form of the online forums held under WP31 (see: D57 and D58) between months 41 and 43. This preliminary evaluation mainly consisted in providing basic data and figures regarding the functioning of the online forums, in order to qualitatively and quantitatively assess the contributions of its participants and contents, and analyse their relevance with respect to the objectives

of WP31. Beyond preliminary evaluation, this workshop was also an opportunity to foster creativity among OPERA team members, as regarding the future of the Community of Practices that the 3 online forums aimed at strengthening, in close relation to the development of a gender trainers' database and in the final OPERA conference to be held in February 2011. Another issue discussed under this session was the transferability of the first outcomes of this Community of Practices (CoPs) into the process of definition of curriculum and quality standards.

Second, this workshop was an opportunity to collectively discuss and detail the criteria for considering training activities carried out by the various OPERA teams to respect a training-the-trainers format. Therefore, beyond the monitoring of those activities, a full working session was dedicated to the issue of transferring knowledge in training, which unravelled a series of pitfalls and still pending challenges to be further discussed during the final conference.

Third, this workshop aimed to define the timeline, the target audiences, the objectives and content of the final conference. A call for participation, as well as the themes and streams to be tackled during this final event were agreed and detailed during the workshop, which are included to this deliverable.

Finally, these different issues were put into a broader perspective during a working session devoted to the final outputs of OPERA, placing the emphasis on potential publication outlets; the future of the Gender Trainers Database; and, more generally, the making of a CoPs among gender trainers in Europe. The still pending tasks to be implemented up to the completion of QUING, were then outlined in order to offer as many avenues as possible for ensuring the sustainability of the outputs of OPERA. This reflection has provided the outline of the present final report.

## **2.2 OPERA Deliverables: timeline and contents**

### **Deliverable no 16: Questionnaire to assess existing and past training experiences of national, regional and local institutions**

Responsible team(s): UCM team

Authors: Ana Espirito Santo, Ana Fernández de Vega, Valentina Longo, Inês Nunes Fernandes, and Silvia López Rodríguez

Due date of deliverable: 31.05.2007

Actual submission date: 31.05.2007

#### *Content:*

The aim of this questionnaire was to collect information on which public bodies in each of the Member States commission 'gender training' for their staff and what is the nature of this training. The purpose was not only to find out which bodies organize such trainings, but also to identify who are the gender trainers in charge of organizing these trainings in order to learn from their experiences (e.g. what they consider as good practices of gender training), to find out who are the targets of gender training, and how curricula are formulated. The questionnaire has been translated into German, French, Spanish and Dutch by HU, YW, UCM.

### **Deliverable no 26: Database on relevant gender training experts**

Responsible team(s): UCM

Author(s): Ana Espirito Santo, Ana Fernández de Vega, Valentina Longo, Inês Nunes Fernandes, and Silvia López Rodríguez

Due date of deliverable: 30.09.2007

Actual Submission date: 30.09.2007

## *Content*

The data provided in this database on relevant gender trainers in the 30 QUING case studies aimed at completing the overview given in the *Opera Report of Gender Training in All Countries* (D29). In this case, the data collected by the different QUING researchers in each country and at the European Union level offered information on gender trainers throughout Europe, including full name, type of trainer, telephone number, e-mail address and postal address. In some cases, information concerning some aspects was not available.

### **Deliverable no 29: *Report on Gender training in all countries***

Responsible team(s): UCM

Author(s): Ana Espirito Santo, Ana Fernández de Vega, Valentina Longo, Inês Nunes Fernandes, and Silvia López Rodríguez

Inputs: YW (Lut Mergaert, Alain Denis for survey design)

Due date of deliverable: 30.09.2007

Actual Submission date: 30.09.2007

## *Content*

This report presented the information gathered about gender training in all the cases and its main results. The report was structured as follows: first, a summary of the results in all the countries (29 cases) as well as the European Union concerning the four aspects of gender training studied by OPERA, namely commissioners, trainers, targets and best examples of gender training. These four aspects of gender training were presented with tables that systematized all the information provided from all the cases, and respective comments. Part two expounded the main results of the survey addressed to the public bodies that commission gender training in each of the QUING countries and in the EU through a questionnaire that was available in five languages from the QUING web site. Analysis and conclusions about the survey were provided by the Yellow Window partner coordinated by Lut Mergaert. Finally, in the last part of the report, general concluding remarks emphasized the main results in all the analyzed countries, the connection between different aspects of the presented results, and provided an overview of the report. Four documents were annexed to the deliverable that complemented the report.

### **Deliverable no 43: *Pilot manual for gender trainers including methodological and didactic guidelines***

Responsible team(s): HU Berlin Team, UCM team

Authors: Susanne Baer, Lucy Nowottnick and Amaia Pérez-Orozco

with the contribution of: Maria Bustelo and Emanuela Lombardo, and inputs from: Lut Mergaert and Mieke Verloo

Due date of deliverable: 31.07.2008

Actual submission date: 31.07.2008

### **Deliverable no 37: *Guidelines for the selection of pilot countries***

Responsible team(s): HU Berlin Team, UCM team

Authors: Susanne Baer, Lucy Nowottnick and Amaia Pérez-Orozco

With the contribution of: Maria Bustelo and Emanuela Lombardo, and inputs from: Lut Mergaert and Mieke Verloo

Due date of deliverable: 31.07.2008

Actual submission date: 31.07.2008

## *Content*

This document was the starting point for the QUING work package no. 29. It focused on the establishment of criteria for an adequate selection of pilot countries for Gender+ Training (G+T) according to QUING standards. We suggested the use of a context matrix and a typology matrix to allow us to systematically select countries as pilots. The final decision on which training will be piloted where has to be made in the light of such criteria, but also in light of resources, willingness of partners to have such trainings and timing. We thus looked at relevant general aspects of G+T as well as on relevant aspects of the country setting in which the G+T is embedded. This included a preliminary analysis of the opportunities provided by the training context in each country, as well as a preliminary assessment as to which countries have more or less developed experiences of G+T.

### **Deliverable No. 65: *Guidelines for curricula standards for gender+ training***

Authors: Florence Pauly and Lut Mergaert (Yellow Window, Belgium), Susanne Baer and Lucy Nowotnick (Humboldt University Berlin, Germany), María Bustelo and Emanuela Lombardo (Universidad Complutense de Madrid, Spain), Mieke Verloo (Radboud University, The Netherlands).

Due date of deliverable: 31.08.2009

Actual submission date: 31.08.2009

## *Content*

These guidelines were designed as a resource manual for procurement in gender+ training. This manual is aimed at commissioners, i.e, not only those who pay for training but also those who plan, organize, design and fund gender+ training in public institutions, as the aim of OPERA is to provide policymakers with guidelines for a more effective implementation of gender mainstreaming and training is part of this broader process. Moreover, the survey of quality manuals on gender+ training that we have conducted has revealed that most manuals are a resource for trainers rather than for commissioners. This manual, by addressing commissioners of training, aims at filling this gap. The objective of this manual is to delineate minimum curricula standards for designing, organizing, and monitoring quality gender+ training. This manual only briefly touches upon “train the trainer” approaches because according to the result of our survey, in a usual course of action, public institutions tend not to train gender(+) trainers. The first chapter provides an overview about the concept of gender+ training as used in the QUING project. It discusses gender+ training goals and draws attention to the broader equality strategy in which such trainings must be embedded, which confers an eminently contextual characteristic to gender+ training. It then puts forward a tool to delineate this very context, and outlines guiding principles of gender+ training quality. Although the content of gender+ training is always contextual, chapter 2 draws upon the aspects to consider when designing gender+ training activities. It opens with suggesting a typology of four different kinds of training activities before developing the core elements of the curriculum: its political dimensions, its legal context, frame or even mandate, the gender+ theories it must be rooted in, its intersectionality dimension, and the resistances that are inherently part of its content. Chapter 3 focuses on other deciding elements of the curriculum design. It discusses how the audience, the need for training courses, their timing and location, the methodology used and the trainer can contribute to the success of gender+ training activities. Finally, tools for evaluation and monitoring are discussed in chapter 4.

### **Deliverable no 50: *Evaluation Report assessing the pilot study and providing recommendations for training***

**Responsible team:** UCM team

Author: Ana de Mendoza, with the contribution of: Susanne Baer, Maria Bustelo, Janet Keim, Emanuela Lombardo, Lut Mergaert, Lucy Nowotnick, and Mieke Verloo

Due date of deliverable: 30.06.2009

Actual submission date: 29.06.2009

### *Content*

This 32 pages report extensively assess the pilot training carried out by external actors (but YW) between April and December 2008 in Spain (3), Luxemburg (1), Germany (1) and at the EU level. It provides a thorough description of the training pilot experiences (including their process of selection), as well as an overview of their monitoring and evaluation process.

#### **Deliverable No. 57: *Manual for gender trainers. Guidelines towards a community of practice among gender+ trainers in Europe: a manual for training trainers through 3 on-line forums***

Authors: Maxime Forest, Maria Bustelo  
(With inputs of Lut Mergaert, Emanuela Lombardo, Susanne Baer and Lucy Nowotnick)

Due date of deliverable: 31.10.2009  
Actual submission date: 03.12.2009

### *Content*

This deliverable accounts for one of the major deviations in the initial OPERA implementation plan (see: section 3). It intends to provide guidelines for QUING gender+ trainers involved in the making of a virtual community, as the OPERA team decided to convert “training-the-trainers activities” into 3 on-line monographic one-day forums moderated by OPERA team members and opened to the network of gender+ training experts built through the synergy between OPERA and TARGET. The need for such a community of practices and its potential outcomes for trainers’ activities, as well as potential resistances to the sharing of good/innovative practices and the ways to overcome it are discussed in Section 1. Consecutively, Section 2 lists and justifies the transversal topics to be addressed in the 3 monographic on-line forums, that is, ‘How to include intersectionality and gender/feminist theory in gender+ training’, ‘How to use real participatory and experiential methodology’, and ‘How to deal with resistances’. A methodology is suggested in Section 3 that briefly expounds major technical solutions adopted and discusses the role of the administrator, the moderators and the participants, as well as the ways to work in a cumulative way.

#### **Deliverable No. 58: *Monitoring and evaluation protocol for the training of trainers. Monitoring and evaluation protocol of the on-line forums***

Authors: Maxime Forest, Maria Bustelo (With inputs of Lut Mergaert)

Due date of deliverable: 31.10.2009  
Actual submission date: 03.12.2009

### *Content*

Drawing upon the Guidelines for curricula standards for Gender+ training (D65) that state that « to promote trainings with a long term impact, gender+ training should be monitored and evaluated », this deliverable provides monitoring and evaluation instruments for the overall assessment of the on-line community of practice launched in the form of 3 on-line, monothematic forums.

#### **Deliverable No. 64: *Report on Curriculum Workshops***

Authors: Maxime Forest, Emanuela Lombardo  
(With inputs of Lut Mergaert, Susanne Baer, Lucy Nowotnick, Karin Tertinegg, María Bustelo, and all the participants to the reported workshops (see: annex II))

Due date of deliverable: 31.10.2009  
Actual submission date: 30.11.2009

### *Content*

Initially planned for month 34 (July, 2009), the deliverable on reporting curriculum workshop was postponed to month 37 in order to coincide with the QUING conference held in Budapest in October, 2009, and actually handed off in November, 2009. This 47 pages deliverable co-authored by Emanuela Lombardo and Maxime Forest, with inputs from OPERA teams, jointly reports on two curriculum workshops respectively held under OPERA and the TARGET project that strongly differed in terms of length, participants and process – on the issue of Gender+ training curricula. Therefore, it is merely the sum of the inputs of the participants to these workshops. These issues are also dealt with in D65 (Guidelines for Curricula Standards for Gender+ Training) and D57 and 58. Although it did not intend to be exhaustive as regards the on-going discussion about shaping standards for curricula, this report nonetheless suggests some provisional conclusions on Gender+ training curricula and methodology.

### **Deliverable No. 75: Report on the Final OPERA Workshop. Outline of the Final OPERA Report**

Authors: Lucy Ferguson, Maxime Forest  
(With input from Lut Mergaert, Emanuela Lombardo, and Lucy Nowottnick)

Due date of deliverable: 31.08.2010  
Actual submission date: 22.12.2010

### *Content*

Initially planned for month 47 (August, 2010), the submission of this deliverable reporting on the Final OPERA workshop was postponed to month 49, due to unexpected communication problems within the UCM team. This 23 pages document (+ annexes), reports on the Final OPERA workshop, held in Madrid in June, 2010. It addresses the extra training activities carried out under WP31, provides a preliminary assessment of the online forums, and reflects about the future of the online Community of Practice those aimed to launch. It also entails a reflection on the production of knowledge on Gender+ training and contemplates the publication and communication opportunities of OPERA for the remaining months. Finally, it includes an outline of the present final report.

### **Deliverable No. 86: OPERA Conference Report**

Author: Lucy Ferguson, (With input from Maxime Forest and Maria Bustelo)

Due date of deliverable: 31.03.2011  
Actual submission date: 31.03.2011

### *Content*

This deliverable reports on the Final OPERA conference, “Advancing Gender+ Training in Theory and Practice”, held in Madrid on February 2-3, 2011. It underlines the objectives of the conference, organized as an international event for experts, academics, commissioners and practitioners of gender+ training, which gathered about 140 actors from 22 countries. It details the conference’s methodology, the steps taken to achieve its objectives and assesses its major achievements. It also provides an extensive overview of the discussions through a series of annexes.

## **2.3 OPERA training activities**

In this sub-section, we report on one of the core activities of OPERA: training. As stated in the full annex under WP 29 and WP 31, training activities to be carried out under OPERA were of two kinds:

- A pilot training had to be conducted in selected countries, which aimed at gathering information about the needs of different stakeholders involved in the pilot training, establishing the evaluation criteria prior to the pilot, and designing the techniques for gathering and

analyzing the information for the evaluation. This was also meant to include "ad-hoc" records for registering processes for reaching target groups and trainees, observation records, questionnaires, interviews and focus groups, processing and analyzing the data, establishing conclusions, recommendations and lessons learned. A follow-up after six months from each pilot training activity had to be organized for evaluating and checking whether or not people trained through the pilot were successfully applying in their further training activities what they learnt in the training.

- Training of trainers was conceived as the best "multiplication", or "spreading" strategy. The emphasis was to be placed on content for training and training methodologies. To overcome language problems and take into account the many countries involved, a "tree strategy" was to be employed: some trainers of trainers were to be selected and trained in this WP at the level of 11 European countries, and to consecutively engage in training trainers in the other member states and candidate countries, and within countries. This second round of training had to be monitored and evaluated by the "first level" trainers. The "trainer's manual" to be developed hence was expected to include a monitoring and evaluation protocol for this second level training.

Whereas pilots training were carried out in 2008 in Spain, Luxemburg, Germany and at the EU level (DG research), training-the trainers activities have experienced major deviations (see: section 3) due to a lack of resources. Activities carried out under WP 29 and WP 31 are reported below, and takes into account those changes.

#### A) Pilot trainings

During 2008, different pilots on Gender+ Training were conducted in order to gather substantial input to feed the Manual on Gender+ Training. Three pilots were held in Spain, one in Luxemburg, one in Brussels and one in Germany. Although the trainings analyzed were very different regarding design, objectives or duration, all of them had been pre-identified as good practices and turned to give interesting inputs for quality criteria on Gender+ Training. Besides the Pilots on Training, some other research activities were conducted to also feed the debate on Gender+ Training Quality, such as literature review and interviews with commissioners.

#### Selection of pilot experiences:

The selection of Pilots and their pre-identification as "best practices on G+T" were based upon the following criteria:

- ✓ G+T promoted in the framework of a public policy strategy of G+T provision, linked to implementation of gender mainstreaming
- ✓ Targeting policy makers (politicians, public administrators, civil servants)
- ✓ General gender+ contents
- ✓ Any country / certain languages (English, Dutch, German and Spanish)

Although initially two different kinds of pilots were planned (pre-guidelines and post-guidelines), the process of preparing and conducting the pilots became itself a source of information for discussing the guidelines, so the whole process of piloting turned to be much more interconnected than expected. This is the reason why all pilots have been analyzed under the same criteria, regardless of whether they were conducted *before* or *after* the delivery of D 43 ("*Pilot manual for gender trainers including methodological and didactic guidelines*").

More concrete criteria were also applied to the monitoring of pilot experiences:

- Dates: the gender+ training (G+T) had to take place from 15th February to 30th June, 2008. This was a necessary condition since the type of monitoring implied additional activities prior to the training and once it had finished.
- Commissioning: the G+T had to be commissioned by a public institution i.e. only those trainings that are promoted in the framework of a public policy strategy of G+T provision could be monitored. Nevertheless, a governmental institution directly commissioning the G+T was not always a necessary condition. E.g. a G+T financed by a European project and organized by an NGO could be monitored if the activity fell under the realm of an institutional project such as institutional strengthening.
- Content: the training should be focused on gender aspects, although gender issues could be just a part of broader training curricula (in this case, only the section related to gender was monitored). Gender contents had to be quite general, mainly: awareness raising, gender budgets, gender mainstreaming and gender equality legislation (e.g. European, national, UN legislation). It could include training on how gender intersects with other inequalities. G+T with a more specific content was considered in the case of EU pilot in relation to a specific field (research).
- Length: A minimum length of four hours was needed. No maximum length was required.
- Targets: The training had to be addressed to policy makers, public administrators or civil servants. No specific hierarchical level was required, neither was it important whether the participants were political or technical staff.
- Languages: gender+ training in English, Dutch, German and Spanish could be monitored.

#### Conducted Pilot trainings:

##### **Spain:**

**Training Institution:** Agora  
**Commissioned by:** Municipality of Ceuta  
**Format :** Face to face  
**Duration:** 4 days  
**Dates:** May 2008

**Training Institution:** Fundacion Mujeres  
**Commissioned by:** Regional Government of Cantabria  
**Format :** On line and face to face  
**Duration:** 3 days  
**Dates:** May 2008

**Training Institution:** LIKaDI  
**Commissioned by:** Regional Government of Andalucia  
**Format :** Face to face  
**Duration:** 3 days  
**Dates:** May 2008

##### **Luxemburg:**

**Training Institution:** Radboud University Nijmegen (NL)  
**Commissioned by:** Luxembourg Administration  
  
**Format:** Face to face  
**Duration:** 3 days (spaced out over 3 months)  
**Dates:** October-December 2008

##### **EU Institutions:**

**Training Institution:** Yellow Window  
**Commissioned by:** EU Science in Society National Contact Points

**Format :** Face to face  
**Duration:** 1 day  
**Dates:** September 2008

**Germany:**

**Training Institution:** Gender consulting  
**Commissioned by:** Ministry for Social Affairs of the Land of Niedersachsen  
**Format:** Face to face  
**Duration:** 3 days  
**Dates:** April, 2008

Monitoring Process:

Previous materials for monitoring were prepared such as questionnaires for trainers and trainees, and guidance questions for pilot selections (See Annex for complete documents). Two voices were the most relevant ones for the monitoring process: participants and trainers. The main instruments of the monitoring process were:

For Participants:

- A first questionnaire (ex-ante questionnaire) addressed to the participants that had to be completed before the training started. It collected data on their expectations, motivations (including incentives), prior gender knowledge, profile, etc.
- A second questionnaire (exit questionnaire) addressed to the participants was completed once the training was finished. It aimed to obtain information on their opinions on the applicability of the contents, the methodology used, etc. and it included a self-assessment on what they had learnt from the experience and whether it had prompted any change in the way they used to deal with gender+ inequality.

For Trainers:

- A questionnaire with closed questions asking for general data of the course, such as logistics, methodology, timing, length, etc. This questionnaire could be passed at any moment, although some of the information was available prior to the trainer.
- A questionnaire with open questions (or personal interview) that seek to obtain more subtle and detailed information on aspects of the course such as: possible divergence between the initial targets and the actual participants; participants' resistances and whether and how they had been overcome; the methodology selected and its success; trainers' perceptions and experience, etc. This was passed once the Gender+ Training had finished.

The monitoring methodology was very flexible in order to better adapt to the specific format and conditions of the selected Gender+ Training. The concrete form of the monitoring process was, in any case, agreed with the trainers, taking into account:

- Whether it was an on-line, face-to-face or mixed course
- Whether it took place somewhere the team could easily reach.
- Who was the trainer (individual/team/organization)

After the course, contents and materials used were gathered to complete the monitoring process. Once the evaluation was completed a feedback report was sent to the training teams.

As these pilot trainings monitored by QUING have been mostly (4 out of 6) conducted by external partners, their content will not be detailed in this report. It can be found in D 50 (*Evaluation Report assessing the pilot study and providing recommendations for training*).

## B) On-line forums as part of a Community of Practices

As result of the deviations with respect to the initial implementation plan (see: section 3), 3 on-line forums have been held in February-April 2010, which have constituted the main venue for enhancing gender+ training activities through capacity-building, by addressing gender experts and trainers and sharing experiences. Those forums have been designed as a next step towards the making of a Community of Practice among Gender+ trainers in Europe that complements the updated Gender trainers' database. We understand building a CoPs as a means of creating "supportive" networks rather than "expert networks", i.e. a platform which aims at fostering *effective changes* and to enhance communicational and tutorial skills of its members. Forums are briefly detailed below, as regards their justification within OPERA, their content and schedule, and the basic features of participants. The detailed content of discussions is thoroughly reported in D75.

### Forum 1: How to include intersectionality and gender/feminist theory in gender+ training?'

#### *Justification*

We consider gender theory to be the basis of gender+ competence. This conceptual framework is key to help trainees understand which power mechanisms are at stake in gender+ inequalities, how inequalities are maintained and reproduced, and how they can be tackled. Rooting practical tools into a solid conceptual framework is the pre-condition to gain a transferable and long-lasting result (see: D65: 18). Gender+ theory includes reflections on the structural causes of gender+ inequality, but also the multiple interconnected causes which create an unequal relation between the sexes in the areas of family, work, politics, sexuality, culture, or intimacy. Elements of change and transformation, of empowerment and participation of civil society have also been pointed as relevant part of gender theory to be used in gender+ training. Yet, gender+ theory needs to be balanced with practical contents, in order to make newly acquired ideas and theoretical insights transferable into daily work. This may entail reshaping the most advanced gender theories so they can be communicated to a larger public but avoiding simplifications that often reveal to be exclusive. One of the main challenges in using gender theory consists in the priority order set up between notions such as inequality, equality, gender and gender "+". While it can be difficult to separate gender from inequality, deciding what to start with often depends from the audience, from time limit and from the kind changes the training pretend to achieve. It can be also highly relevant to address the different meanings of gender equality strategies implied by gender+ equality policies, as those put in evidence by QUING. One of the main justification for dedicating a forum to the inclusion of intersectionality and gender/feminist theories in gender+ training was thus the need to operationalize the huge contribution of QUING to the knowledge of gender equality policies in Europe. More specifically, as it has been stated in previous deliverables, integrating the concept of intersectionality in gender+ trainings "*highlights the importance of understanding and reflecting on multiple inequalities and multiple discriminations*" (D65: 20). The main challenge is to operationalize intersectionality theory into training activities avoiding simplifications that stems from its complexity. The question of what intersectionality is cannot be answered easily as different conceptualizations, and different terminologies still coexist to designate the intersection (and potentially, the mutual consolidation) of different inequality strands. Moreover, for the last 20 years, intersectionality has been theorized from the points of view of feminisms and gender studies, critical race studies, queer studies and disability studies. This second forum addressed the issue of how transferring intersectionality theories into training practices, in order to make of the "+", an integral part of gender+ competences acquired during training activities. The issue tackled in this forum reflected the variety of training methods used by the participants, as well as the need to reflect on the role that intersectionality plays with regard to the context and conditions of gender+ training activities.

*Moderators:* Mieke Verloo and Maxime Forest

## Forum 2: 'How to use real participatory and experiential methodology in gender+ training?'

### *Justification*

Even if discussions held under OPERA led to highlight that methods and instruments are not good or bad *per se*, given that gender+ training touches directly at the personal level, experiential learning are thought to be particularly helpful, particularly for basic gender+ training. Experiential learning implies participants locating themselves the object of study and appropriating it. Experiential pedagogy usually includes the work with real cases of participants' daily tasks, to starts from participants' own definitions of gender equality, to try to meet people's needs and avoiding the standardization of contents and methods. Experiential methodology also permits to deal with cognitive resistances, progressively bridging the gap between ones' representations, beliefs or values, and a theoretically informed perspective on gender (in)equality, through better exemplification and a balanced combination of theoretical and practical elements. The main limitations of experiential methodologies is that it takes longer to transmit contents, while its applicability will particularly depends on trainers' ability. This made especially relevant to tackle the very content not only of experiential but also participatory methodologies through a forum mobilizing the CoP.

*Moderators:* María Bustelo and Maxime Forest

## Forum 3: 'How to deal with resistances to gender+ training?'

### *Justification*

Resistance to gender+ training is both a common and diverse phenomenon. From an institutional point of view, resistance aim at maintaining the status quo and preventing change. It may be integral to the gender+ training context, through the denial of the relevance of the gender+ equality policies, the refusal to accept responsibility for dealing with gender+ equality policies or simply through non-implementation. From an individual point of view, which is not mutually exclusive with the institutional one, it stems primarily from the fact that trainers are questioning the beliefs, paradigms and social position of (some of) the trainees, and change management literature underlines that the more personal attitudes and behavioral patterns are addressed, the stronger resistance can be. Resistances can then take different forms of denial of a specific issue, from the mere negation of its existence to the dismissal of its changeability and the rejection of ones' own ability to contribute to change. Locating the origin of resistances may help formulating adequate answers, but their management can result problematic. Time, a top-down policy change as a source of legitimacy for pursuing equality and experiential and interactive learning techniques are some of the elements that have been praised to overcome resistances. Establishing a dialogue with participants is also perceived as a good way to meet resistance, as well as making things concrete and ask people for collaboration. These different avenues offered for dealing with resistances have been core to the discussions held during the forums.

*Moderators:* Emanuela Lombardo and Lut Mergaert

### *Schedule*

The first online forum was carried out on February 16<sup>th</sup> and dedicated to the following issue: 'How to include intersectionality and gender/feminist theory in gender+ training?'. It was articulated along 8 topics. The second online forum was carried out on March, 22<sup>nd</sup> and devoted to the use of real participatory and experiential methodologies in Gender+ training. It was articulated through 5 topics. The last forum was carried out on April, 26<sup>th</sup>. It tackled the issue of resistances to gender+ training from an experience-based perspective through a set of 5 topics.

## *Participation*

Over 420 gender trainers and experts were contacted to join this CoPs, of which 339 feature in the gender trainers' database. The same operation was carried out for each forum to be held online. Each of the 53 registrations has been validated in order to prevent fake users (34) and 2 confirmation e-mails have been sent to registered users. The term of each forum has been communicated at least 5 weeks in advance, and regularly updated user's guidelines were sent to registered users. The 3 forums have been held respectively in 2 sessions of 2 hours (forum 1), and 1 3-hours session (forums 2 and 3), with 2 moderators. Each forum has been left opened for additional comments at least 3 weeks after the completion of the live session. A total of 53 (15% of the database) registered on-line to participate, who are disaggregated per country as follows: Spain : 11; Austria : 7; Germany : 6; Belgium : 5; Hungary, UN, Sweden, USA : 3; EU, Bulgaria : 2; Croatia, Romania, Argentina, Greece, Italy, Lithuania, The Netherlands, Portugal: 1

Actual participants to the 3 on-line sessions approximately reflected the same balance, also in terms of profile/main dedication, with respectively 40% of practitioners and gender experts (mostly academics), and 20% of commissioners, although it is clear that several participants potentially exerted both as trainers and gender experts.

## **2.4 The Final conference: an international event for practitioners, commissioners and experts**

### **Background and Objectives**

As set out clearly in the introduction, the aim of the OPERA component is to operationalize the findings of the QUING project and communicate these by integrating QUING knowledge into operational standards for gender+ training. The OPERA Conference was a vital aspect of this process as it provided a forum for bringing together gender+ trainers from across Europe to discuss the OPERA findings and work towards a consensus for developing quality standards.

Following on from the quality criteria and best practices set out above in 4.2.2., the OPERA team wanted to create an opportunity to engage practitioners, commissioners and academics working on knowledge transfer issues in order to begin a process of establishing such criteria. This was important as the OPERA team shared a commitment to establishing quality standards through a collective process, rather than as a top-down imposition from above. The conference therefore aimed to provide a platform for such engagement and to establish networks for the strengthening and development of a future Community of Practices for gender+ training in the European Union.

The initial planning stages of the conference – including the final OPERA workshop outlined above - involved identifying the key themes that had emerged from the previous OPERA activities, in particular the three online fora as outlined above. As a result of these discussions, nine thematic strands were established:

- Defining curriculum standards
- Monitoring and evaluation of training activities
- The definition of quality criteria
- Communicating feminist and gender studies theory in training
- Participatory-experiential methodologies
- New challenges for gender+ training: mainstreaming intersectionality?
- Dealing with resistances to gender+ training
- Negotiating with commissioners
- Towards a professionalisation of gender+ training activities?

These strands were intended to guide the content, framing and planning of the conference. In addition to identifying the key themes, it was agreed during these planning meetings that the conference

should aim to produce some kind of mission statement or declaration on gender+ training as a first step forward in establishing minimum quality criteria, building a Community of Practitioners, and as a tool of accreditation for gender trainers.

#### *Attracting a broad range of participants*

One of the keys to the conference being successful was being able to attract a high number of gender+ training professionals – not just academics and public sector employees but trainers working freelance in the private sector. This was a particular challenge as it was acknowledged that gender+ training in general would not be funded to attend from any institutional source and would have to sacrifice the potential income for the duration of the conference. In order to deal with this particular challenge, a part of the conference budget was set aside to offer travel and accommodation bursaries for gender+ training practitioners who did not have institutional funding, upon the condition of an active participation to the conference. It also needed to be clear that there would be benefits to practitioners over the longer term, and that the conference represented an investment. Also important was the need to make the conference both appealing and accessible to practitioners, and this required some thought about the format of the conference. It was decided that the conference would be participatory and practice-oriented in order to provide an enabling environment for dialogue, reflexivity and collaborative working. In particular, this meant avoiding a standard academic format and exploring other possibilities. After some consideration about the most appropriate methods, the OPERA team agreed on a combination of plenary sessions with roundtables and more interactive parallel workshop sessions.

In the first call for participation, potential presenters were contacted through a number of different lists, such as the OPERA database and gender and politics mailing lists. The call specified that proposals for conference participation should include a short biography and an abstract outlining an oral presentation for the parallel workshops. No written paper was required, a further step taken in order to attract practitioners and move away from the typical requirements of an academic conference. The call for participation was presented in a very open way – it was made clear that presentations could take the form of interactive activities, reflecting the diverse methods to be employed during the conference - such as: sharing of good practices; reflections on aspects of the training experience; or more traditional academic presentations.

Another strategy adopted to attract a wide range of participants was the securing of high profile speakers from both the academic and commissioning spheres. Carol Bacchi from the University of Adelaide was invited to provide the keynote speech, entitled 'Gender mainstreaming and reflexivity: asking some hard questions', which aimed to provoke and challenge prevailing assumptions about gender mainstreaming and gender+ training. The roundtables included contributions from representatives of the European Commission, the European Institute for Gender Equality and the Spanish *Instituto de la Mujer* (Women's Institute).

Additionally, although this conference was conceived and advertised as an 'international event', attention was paid to securing the participation of a high number of Spanish actors in gender+ training. Indeed, Spain has recently turned to be a forerunner in implementing Gender equality policies and Spanish institutions are increasingly engaged with gender training as a supportive tool for Gender mainstreaming strategies. Moreover, the Act on Research, Technology and Innovation (*Ley de la Ciencia, La Tecnología y la Innovación*) passed on March 17<sup>th</sup> 2011, has potential for developing gender+ training activities, as it requests academic and research institutions to include a gender perspective at different levels, and has a significant Gender equality component. Efforts were thus carried out to make this conference accessible to a local audience, such as providing simultaneous interpretation in a selection of sessions, making print documents also available in Spanish and encouraging Spanish practitioners to attend and to present oral contributions.

## ***Thematic organisation of the conference***

In order to communicate the OPERA themes most effectively, it was decided that the parallel sessions would operate as three consecutive 'streams', each of which would entail three sessions focussing on a specific priority theme, as identified in the initial planning process and set out above. The idea was that in this way participants would be able to select the stream most relevant to their practice and follow this throughout the conference. The structure and content outlined below was used to guide the conference planning and design of the programme. Some modifications were made to the parallel sessions based on the proposals received from participants, but for the large part participants were highly responsive to the themes suggested by the conference team, targeting their presentations to a particular session or theme.

### Stream 1: Ensuring quality in gender+ training

#### *Theme i: Defining curriculum standards*

While curriculum standards tend to vary depending on the type and format of training, might there be some components that are core to any gender+ training activity? This session discussed what such core components might consist of. For example, communicating an understanding of the structural character of inequalities; promoting knowledge transfer from theory to practice; or adaptation of the training to the participants' background in terms of levels of awareness, understanding, and knowledge. The session also addressed the relationship between gender+ training and law, and explored how to keep training a feminist act

#### *Theme ii: Monitoring and evaluation of training activities*

Effective monitoring and evaluation is necessary in order to assess the impact and outcomes of gender+ training. This session explored the complexities and challenges of monitoring and evaluation in the context of gender+ training. For example, it addressed the role of commissioners; the context in which the training takes place; and the type, structure and culture of an organization. Other issues raised included the role of monitoring, the difference between monitoring and evaluation, and the importance of organisational contexts.

#### *Theme iii: The definition of quality criteria*

This session outlined the results of discussions between two communities of gender experts and practitioners - QUING and TARGET – on the definition of quality criteria for gender+ training. The aim was to promote self-reflexivity among gender+ trainers about the quality criteria they apply to their own work, and to present an opportunity to establish shared norms on quality criteria. The discussion also extended to exploring how such quality criteria could be mainstreamed and strengthened through a future community of gender+ trainers. Contributions drawing on practitioners' experiences of defining quality standards were especially welcome.

### Stream 2: Developing practice through reflexivity

#### *Theme i: Communicating feminist and gender studies theory in training*

Gender theories offer reflections on the structural causes of gender+ inequality along with the multiple interconnected causes which create unequal power relations in the family, work, politics, sexuality, culture, and intimacy. They provide conceptual frameworks for understanding power mechanisms in gender+ inequalities, how inequalities are maintained and reproduced, and how they can be tackled. This session aimed to explore the challenges involved in balancing practical, accessible and communicable content with feminist and gender theory. It discussed whether gender+ training activities need to be rooted in a solid conceptual and theoretical framework in order to generate transformative and sustainable outcomes. In practical terms, it addressed how to transfer theoretical insights into the daily work of gender+ trainers.

### *Theme ii: Participatory-experiential methodologies*

Conversations between communities of gender+ trainers and experts have revealed that experiential learning is thought to be particularly helpful for gender+ training. This may involve, for example, working with real cases of participants' daily tasks and/or starting from participants' own definitions of gender equality. This session aimed to discuss the potential and limitations of such methodologies through a reflexive sharing of practitioners' experiences.

### *Theme iii: New challenges for gender+ training: mainstreaming intersectionality?*

Integrating the concept of intersectionality into gender+ trainings is vital for understanding and reflecting on multiple inequalities and multiple discriminations. Here, we aimed to promote the sharing of experiences and practices through which intersectionality can be included in all aspects of the gender+ training. This session explored the concept of intersectionality and reflected on the role that intersectionality plays in the context and conditions of gender+ training activities. The specific aim in relation to the QUING results was to further the debate on how to make the "+" an integral part of the gender+ competences acquired during training activities.

## Stream 3: Strengthening gender+ training through a Community of Practice

### *Theme i: Dealing with resistances to gender+ training*

Resistance to gender+ training is both a common and diverse phenomenon, as revealed through a number of OPERA activities. Resistances may take various forms, such as denial of the relevance of gender+ equality policies, refusal to accept responsibility for dealing with gender+ equality policies or simply through non-implementation. This session explored different types of resistances – from individual to institutional – and provided participants with an opportunity to share their own experiences with the aim of working towards tools and strategies for understanding and dealing with resistances.

### *Theme ii: Negotiating with commissioners*

This session explored which aspects of training tend to be subject to negotiation with commissioners. It also aimed at uncovering the complex relationships established with commissioners, and the importance of establishing mutual responsibility for the outcomes of training activities. This session provided an opportunity to discuss the impact of the domestic legal and institutional frameworks on the development of training activities, and the potential implications of the emerging shift from "gender" towards "diversity" management and/or training.

### *Theme iii: Towards a professionalisation of gender+ training activities?*

This session attempted to map the growing professionalisation and institutionalisation of gender+ training activities in Europe as well as the main challenges that may hinder this development. It explored what kind of incentives would encourage gender+ trainers to share practices and to jointly establish quality criteria and curriculum standards, in a context of growing competition and marketisation of gender+ training. The session also discussed the potential value of establishing a Community of Practitioners to diffuse commonly shared norms and practices.

## **Conference methodology**

As set out above, strong emphasis was placed during the planning stages on moving away from a traditional academic conference format and providing opportunities for interaction, with the aim of making the conference worthwhile and beneficial to practitioners and all participants. As such, the conference was structured around a combination of plenary sessions and more interactive small parallel workshops. In order to promote the most productive discussions and outcomes, Moderators - drawn predominantly but not exclusively from the OPERA team - were appointed to chair each roundtable and parallel session. Each Moderator was provided with a set of questions to guide their session and was asked to lead the discussion along these lines. The aim of this methodology was to

ensure that Moderators were clear on the aims and objectives of their session, and that they were able to get the most out of the audience by posing strategic questions. Also, it was hoped that these guide questions could ensure that the key points that emerged during the OPERA component were discussed. Each session also had an appointed note-taker, who was asked to pick out the key outcomes of each parallel workshop.

The full list of questions for each session is outlined below:

*Roundtable: Gender+ training as a necessary tool in gender mainstreaming strategies in Europe*

- Can gender+ training be conceived by public institutions as a tool for the actual enforcement of GM strategies?
- What challenges and opportunities do these new policy instruments generate?
- Who should be responsible for commissioning and carrying out gender+ training?

*Roundtable: Networks for supporting quality in gender+ training*

- What are the potentials and pitfalls of building expert networks and communities of practices?
- Which degree of 'professionalization' of gender+ training do we think is potentially good?
- How to link trainers' participation in communities of practice to the recognition of more formalised or professional credentials?

*Ensuring quality in gender+ training (1): Developing quality standards*

- To what extent should be the quality standards dependent on the context? Is it possible to develop minimum G+T quality standards valid for every situation and context?
- If there are any kinds of requirements or certifications for G+ trainers: who should be the actors certifying or setting the rules for accreditation?
- How important are gender+ trainers and experts' networks in developing G+T standards?
- How can commissioners set up and monitor quality standards for the trainings commissioned?

*Transferring knowledge: theory and methodology (1): Participatory-experiential methodologies*

- Are there any preconditions before opting for experiential and/or participatory methods?
- What undermines their efficiency/usefulness?
- How can these methods help to deal with resistances from trainees?

*Promoting reflexivity through a Community of Practices (1): Dealing with resistances to gender+ training*

- Does 'real transformation' in a gender+ training process require resistance?
- What can we learn from resistances?
- What solutions and strategies that promote a process of change (of ideas, attitudes, practices about gender+ equality, etc.) can we devise starting from the resistances we face?

*Ensuring quality in gender+ training (2): Developing innovative training practices in non-European contexts*

- What specific issues enter into training in non-European contexts?
- Is it possible that gender training in development contexts always needs to take into account intersectionality? E.g. ethnicity, postcolonial relations, donor power relations
- What can European trainings learn from the EU context? And vice versa?

*Transferring knowledge: theory and methodology (2): Communicating feminist and gender studies theory in training*

- How can we make gender theory transferable/understandable to the larger public?
- What elements are essential to make a Gender+ training a feminist act?
- Should direct reference to Gender theory be a quality criteria for a Gender+ training curriculum, and if so, under what conditions?

*Promoting reflexivity through a Community of Practices (2): Experiences in making gender training more inclusive: towards intersectionality?*

- How do we define (in general terms) the relationship between different inequality axes?
- Do trainers tend to establish a hierarchy or priority between these notions according to their audience and the goals of the training they are conducting (e.g. awareness-rising, Gender+ analysis, establishing a gender equality strategy within the organization)?
- Which 'story' do we tell about gender (in)equality in our practice of gender+ training?

*Ensuring quality in gender+ training (3): Towards a professionalization of gender+ training activities?*

- Which professionalization paths for gender+ training activities can be identified in Europe?
- Should this process be bottom-up or top-down? In other words, what should be the role of practitioners, public commissioners and public authorities in shaping collective norms and quality criteria?
- What should be the contribution of the academic sphere in training professionals of gender+ training?

*Transferring knowledge: theory and methodology (3): New methodological challenges*

- Is innovation in methodology needed in order to overcome resistance to gender mainstreaming in institutions?
- What can we learn about methodology from different institutional contexts?
- What defines a training methodology as 'feminist'?

*Promoting reflexivity through a Community of Practices (3): Open session on Experience Feedback*

This session had a more open brief: to encourage debate amongst the audience based on their direct experiences in different institutional settings and to develop a discussion about how to negotiate with commissioners and address their concerns.

This process ensured that before the conference began the Moderators had been given clear guidance on how to make the most of the parallel discussions. This allowed for the most pertinent OPERA issues and findings to be discussed, whilst allowing space for new ideas and challenges to emerge.

### **Conference Achievements**

The conference was held at the *Centro de Estudios de Gestión* at the Somosaguas Campus of the Complutense University and attended by 126 participants from a wide range of countries - Albania, Argentina, Australia, Austria, Belgium, Bulgaria, Canada, France, Germany, Ireland, Italy, Lithuania, Netherlands, Norway, Portugal, Romania, Spain, Spain, Sweden, Switzerland, UK, and USA. The conference was highly successful in attracting the target audience identified during the planning stages. Out of the 126 participants, 50 were gender+ trainers or practitioners, 37 academics and 39 commissioners or representatives of equality institutions. It should be highlighted that all the academics who attended have an interest in gender training and/or knowledge transfer, and as such

the majority participated in their capacity as practitioners rather than as researchers. As such, the conference can be considered a genuine landmark event in bringing together gender trainers from across Europe for the first time, and for building steps towards an emerging Community of Practices in gender+ training.

Another considerable success of the conference was the high levels of participation and interaction in the plenary and parallel sessions. As planned, the Moderators of the parallel sessions allowed time for discussions and contributions from the audience in order to explore the guide questions set out above and also new areas brought up in the presentations. This meant that the key issues identified during the OPERA component were discussed and debated in more detail, achieving one of the key objectives of the conference. Coffee breaks and the lunch provided on campus also gave opportunities for informal networking and exchange between participants from different professional backgrounds, and contributed to the strengthening of the Communities of Practice.

### ***Reflections and Next Steps***

The conference evaluation process offers an opportunity for reflecting on the strengths and weaknesses of the conference and for generating lessons learned for future work on gender+ training. The 30 evaluation forms returned after the conference and carefully analysed provide some preliminary material for further reflection. A number of key points can be drawn from this evaluation process. First, they demonstrate the high level of interest and need for professional events of this kind, which aim at fostering knowledge transfer, sharing of practices, self-reflexivity, mutual learning and networking. Second, they emphasise the need for further disseminating the OPERA outputs (in particular as regards the process of definition of minimum quality criteria), through a community of practice. At the same time, respondents underlined the importance of face-to-face encounters, in addition to virtual platforms such as on-line forums or a future interactive database. Third, the evaluation process suggests that one of the main objectives of this conference has been at least partially fulfilled: to launch a collective process that aims to shape the norms, quality criteria and curriculum standards for a profession in the making. From this point of view, the final OPERA conference was considered to be especially welcome and inspiring. Many respondents stress the need to acknowledge a collective responsibility in order to keep this process alive, with the dissemination of the Madrid Declaration and the transfer of the database as two key components of this. They also consider that the process of developing a Community of Practices should include opportunities for regular meetings at the international level, also involving non-EU gender trainers and experts.

From a more practical point of view, the overall organisation of the conference was considered to be very high quality, and – as intended – the themes and content matched the demands and interests of the practitioners. However, in spite of the efforts made to avoid a strict academic conference format, many participants nevertheless found the conference format more academic than practitioner-oriented. Some suggestions were made as to how this could have been improved. For example, there should have been more space left for more planned networking and interactive activities. This would have allowed for practitioners to get more benefit out of the presence of a number of highly qualified and experienced experts. However, the keynote speech, with its engaging and stimulating content, was considered especially inspiring for most of the participants. Overall, the results of the evaluation should be read as highly positive and enthusiastic, calling for more such events in the nearest future, and for a lively community of practice to be built upon the foundations left by OPERA. Such events should work more closely with the practical needs of practitioners in order to ensure that the format and modes of engagement are appropriate for a broad range of participants.

### **3. Adapting content and priorities**

Section 3 tackles the shifts and changes assumed by the OPERA team with respect to planned activities. Although of minor importance in terms of schedule and activities actually performed, these are certainly relevant to understanding the adaptation of OPERA to the field of gender+ training, and the challenge of mainstreaming STRIQ outputs into training activities.

#### **3.1 Learning from practice: shifts and changes in planned activities**

Although continuous adaptations were requested, as in the other streams of QUING, in order to stick to available human and financial resources (including changes in the planning of pilot trainings and some delay in the submission of D57, D58, D64 and D75, the main deviations in OPERA are to be reported for WP31.

##### *Justified modifications in implementing WP31*

The initial focus of WP31, as stated in the full Annex, was the “training of trainers” as the best “multiplication”, or “spreading” strategy. Drawing on pilot training, expert meetings, and especially on D43 (‘Pilot manual for gender trainers including methodological and didactic guidelines’) and D65 (‘Guidelines for curricula standards for gender+ training’), a first emphasis had to be placed on the content of training, and a second major emphasis on training methodologies. Some trainers were expected to be selected among the QUING researchers and trained in this WP at the level of 11 European countries, and these trainers would then engage in training trainers in the other member states and candidate countries, and within countries.

However, due to the differences between the allocation and timing of resources initially planned and those finally implemented during the first three years of QUING, the genuine content of WP31 – that is, offering a training the trainers activity for the QUING researchers in the eleven partner’s teams, was no longer possible and needed to be readapted. There were much fewer researchers available for OPERA activities in the teams, as the biggest efforts in human resources had been carried out during the first two years of QUING, and there were no additional resources to maintain a ‘face to face’ training format at a European level (mainly in terms of travel expenses).

Nonetheless, the OPERA activity, through its own deliverables and in a fruitful conjunction with the TARGET project, has created a well spread and quite ample community of gender+ training experts who have been in contact and answered the OPERA requests –such as the gender trainers data base, questionnaire to institutions- and attended OPERA expert meetings, and also the ones held through the TARGET project. Through these expert meetings as well as other previous deliverables – especially, during the second management period, the pilot trainings and the fulfilment of the ‘Guidelines for curricula standards’ (D65)-, we have identified gender trainers’ needs, challenges and concerns. From our discussions and from the conclusions of the expert meetings and work sessions reported in D64 (“Report on curriculum workshops”), has emerged the need for a “community of good practices between gender trainers” that would be first established on line. This significant shift from performing training-the-trainers activities in a face-to-face format towards an on-line training community had also an impact on the timing for the submission of due deliverables. A one Month delay in regards to the previously planned date for submitting D67 and D68 (renamed D57 and D58) has been accepted. This allowed enough time to discuss the innovative nature and the technical aspects of the planned format for this on-line community of good practices. The OPERA team has decided to convert “training-the-trainers activities” into 3 on-line monographic, capacity-building one-day forums moderated by OPERA team members in February-April, 2010 and opened to the network of gender+ training experts built through the synergy between OPERA and TARGET.

### **3.2 Mainstreaming STRIQ results into OPERA: the growing relevance of intersectionality**

Beyond above-mentioned changes, which stem from the necessary fit between available resources and tasks to be carried out, there is also a more substantive change to be reported. This is the one that led the methodology and content of OPERA, already very focused on inclusiveness, to leave a greater space to the issue of intersectionality. Indeed, along with (and also as part of) the definition of quality and curriculum standards – as main objectives of OPERA – and the issue of resistances, the inclusion of intersecting inequalities to the design of training equality has been gaining increased relevance.

This adaptation derives from the widely shared premise that gender theory has to be one of the basis of gender+ competence. This conceptual framework is key to help trainees understand which power mechanisms are at stake in gender+ inequalities, how inequalities are maintained and reproduced, and how they can be tackled. Rooting practical tools into a solid conceptual framework is the pre-condition to gain a transferable and long-lasting result (see: D65: 18). Gender+ theory includes reflections on the structural causes of gender+ inequality, but also the multiple interconnected causes which create an unequal relation between the sexes in the areas of family, work, politics, sexuality, culture, or intimacy. Elements of change and transformation, of empowerment and participation of civil society have also been pointed as relevant part of gender theory to be used in gender+ training. Yet, gender+ theory needs to be balanced with practical contents, in order to make newly acquired ideas and theoretical insights transferable into daily work. This may entail reshaping the most advanced gender theories so they can be communicated to a larger public, but avoiding simplifications that often reveal to be exclusive. This process of transfer knowledge has been given specific relevance within the frame of training activities, and OPERA fostered in-depth discussions, both internal and external to QUING, about the ways to ensure the transferability of gender theories in training. One of the most challenging theoretical issues, however, is posed by the attention to be paid to situations of multiple discriminations.

Indeed, as stated in the Full Annex, “if intersectionality is at work in strategies against inequalities, then not only new and more comprehensive analytical methods are needed, and *new methods of education and training*, but also consultation will need to be rethought”. Discussions held under OPERA have shown that intersecting inequalities resulted to be especially challenging to gender trainers, due to their complexity, to the lack of a widely accepted definition and to the different structural relations between different inequality strands this concept may entail. One of the main challenges in using gender theory in gender+ training consists in the priority order set up between notions such as inequality, equality, gender and gender “+” (i.e, intersecting inequalities). While it can be difficult to separate gender from inequality, deciding what to start with often depends from the audience, from time limit and from the kind changes the training pretends to achieve. It can be also highly relevant to address the different meanings of gender equality strategies implied by gender+ equality policies, as those put in evidence by QUING. One of the main justifications for dedicating a forum to the inclusion of intersectionality and gender/feminist theories in gender+ training was thus the need to operationalize the huge contribution of QUING to the knowledge of gender equality policies in Europe. More specifically, as it has been stated in previous deliverables, integrating the concept of intersectionality in gender+ trainings “highlights the importance of understanding and reflecting on multiple inequalities and multiple discriminations” (D65: 20). The main challenge is to operationalize intersectionality theory into training activities avoiding simplifications that may derive from its complexity. The question of what intersectionality is cannot be answered easily as different conceptualizations, and different terminologies still coexist to designate the intersection (and potentially, the mutual consolidation) of different inequality strands. Moreover, for the last 20 years, intersectionality has been theorized from the points of view of feminisms and gender studies, but also critical race studies, queer studies and disability studies.

Questions such as how to make the inclusion of intersecting inequalities a quality criteria and how to properly use intersectionality theories in trainings have been widely addressed during the on-line forums, the OPERA workshops and the Final conference. Discussions did not provide straightforward solutions, and advocated to adapt the references to multiple discriminations with regard to the context and conditions of gender+ training activities. This was made clear especially as STRIQ provided comprehensive data as regards the diversity of policy strategies tackling multiple inequalities in Europe. Although direct references to intersectionality theoretical works such as Crenshaw (1991; 1989), Ferree (2011), Weldon (2008), Verloo (2006) or Walby (2009) are considered to be useful to structure a reflection on multiple inequalities, they are also believed to be too complex to be extensively referred to in a training format. To this respect, Mieke Verloo has shown that using *“more general theories can be helpful as a start and in combination with straightforward feminist theories”*. Though, intersectionality theory may occasionally provide ready-made concepts which might be directly transfer to training, as pointed out by María Bustelo: *‘I have also found useful Hancock (2007). Her use of the ‘oppression Olympics’ is useful to explain in class as opposed to analyse the interactions of different inequalities, and for looking for common things (structural nature of inequalities) as well as the unique mechanism of inequalities for each (looking also for non-intersectional inequalities, as Weldon suggests)*. Yet, as pointed out by Lut Mergaert, including an intersectional dimension to training activities remains a challenge, as pointing to the ‘diversity’ dimension might in some contexts provoke a reaction of rejection of the explicit consideration of any category and thus confirm the status quo.

More practical questions have also received some answer. For instance, the timing of references to multiple discrimination or inequalities in a curriculum, as well as the relationship to be established between those different inequality axes have been addressed. It was thus said that it is very important to present gender as intersected with other inequalities as soon as possible in a training session, in order to de-simplify the issues at stake. Moreover, it was mentioned during the discussions held under OPERA, that making a training more inclusive also made necessary to adapt the language, to make it more inclusive to other forms of inequality’. As one example for synergies among the different strands within QUING, team HU issued a paper on intersectionality in Gender+ Training that combined STRIQ, OPERA and WHY perspectives<sup>2</sup>. Last but not least, QUING STRIQ findings have largely fuelled the thorough discussions held during the two working groups dedicated to the inclusiveness of Gender+ training activities during the final OPERA conference. As a result, those have been mainstreamed among a large community of practitioners.

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<sup>2</sup> Baer, Susanne; Keim, Janet; Nowottnick, Lucy (2009): Intersectionality in Gender Training. Online available at: [http://www.quing.eu/files/2009/WHY\\_paper\\_baerkeimnowottnick.doc](http://www.quing.eu/files/2009/WHY_paper_baerkeimnowottnick.doc)

## 4. Presentation of the main concrete outputs

Section 4 presents the main concrete outputs of OPERA, and their contribution to the overall dissemination of QUING results. It also reports on other dissemination activities directly related to OPERA (including papers, roundtables and trainings), as well as the mainstreaming of the quality criteria elaborated by OPERA throughout the gender academia. This section finally presents the functionalities and future prospects of the gender experts' database.

### 4.1 Dissemination: mainstreaming of quality criteria

#### A) *Dissemination tasks*

The table below summarized the main dissemination tasks carried out by the OPERA team members, including the presentation of OPERA methodology and results, and the dissemination of the quality criteria defined by OPERA through gender training activities.

DATE	TYPE OF EVENT	AUDIENCE	ATTENDANCE	OPERA members involved
October 2007	<i>Expert meeting</i>  OPERA Expert meeting on gender+ training, Vienna, Austria	<i>Academics</i>	30	RAD Mieke Verloo  HU Susanne Baer and Lucy Nowotnick  YW Lut Mergaert  UCM, Maria Bustelo, Emanuela Lombardo  All QUING partners
November 2007	<i>Workshop</i>  Dynamic Cities need Women, Brussels, Belgium	<i>Policymakers, trainers, academics</i>	60	YW Lut Mergaert  RAD Mieke Verloo  UCM Maria Bustelo
February 2008	<i>Expert meeting</i>  Expert meeting of Project Directors TARGET-Atlantis, Fredericton Canada	<i>Academics, policymakers</i>	100	UCM, Emanuela Lombardo
April 2008	<i>Expert meeting</i>  OPERA Expert meeting on gender + training with Spanish trainers from Likadi, Madrid, Spain	<i>Trainers, academics</i>	5	UCM, Maria Bustelo, Emanuela Lombardo, Amaia Pérez
May 2008	<i>Expert meeting</i>  Expert Meeting on Contents of gender training (TARGET), Humboldt University, Berlin, Germany	<i>Trainers, academics</i>	30	HU, Susanne Baer, Lucy Nowotnick  RAD, Mieke Verloo  UCM Maria Bustelo, Emanuela Lombardo

				YW, Lut Mergaert
<b>June 2008</b>	<i>Expert meeting</i>  Expert Meeting on G+T to discuss G+T content, methodology, format and resistance  Umeå, Sweden	<i>Trainers, academics</i>	25	UCM, Maria Bustelo, Emanuela Lombardo
<b>October 2008</b>	<i>Gender training</i>  Gender mainstreaming, Instituto de la Mujer, Castilla-La Mancha, Toledo, Spain.	<i>Policymakers</i>	100	UCM, Emanuela Lombardo
<b>October 2008</b>	<i>Expert meeting</i>  EACEA-FIPSE Meeting of Project Directors (Target), Brussels, Belgium	<i>Academics, policymakers</i>	100	UCM, Emanuela Lombardo  RAD, Mieke Verloo
<b>November 2008</b>	<i>Paper</i>  Presentation of OPERA at the conference Gender Diversity fits Europe - A Journey through South-East Europe	<i>Change agents, trainers, policy maker</i>	100	HU, Janet Keim
<b>November 2008</b>	<i>Expert meeting</i>  expert meeting on gender+ training TARGET, Nijmegen, Netherlands	<i>Trainers, academics</i>	30	RAD, Mieke Verloo  YW, Lut Mergaert  HU, Susanne Baer, Lucy Nowotnick  UCM Maria Bustelo, Emanuela Lombardo, Ana de Mendoza
<b>January 2009</b>	<i>Gender training</i>  Gender impact assessment, Instituto de la Mujer, Castilla-La Mancha, Toledo, Spain	<i>Policymakers</i>	50	UCM, Emanuela Lombardo
<b>March 2009</b>	<i>Expert meeting</i>  Expert Meeting on Gender Competence TARGET, Northeastern University, Boston, USA	<i>Trainers and academics</i>	30	RAD, Mieke Verloo, YW, Lut Mergaert  HU, Susanne Baer  UCM Maria Bustelo, Emanuela Lombardo
<b>May 2009</b>	<i>Gender Training</i>  'Enfoque de género en las políticas locales'. Instituto de la Mujer Castilla- La Mancha. Workshop 'Formación para la transversalidad de género'.	<i>Civil servants, Focal Persons in GE</i>	25	UCM, Silvia López

<b>June 2009</b>	<i>Paper</i> Presentation on „Promoting Equality Policies – Key Aspects for Organisational Change Using the Example of Public Administrations“ in the stream on „Change Agency in the Field of Equality and Diversity“ EOI Conference 2009, Istanbul	<i>International audience, academics, trainers, change agents</i>	25	<b>HU, Lucy Nowotnick</b>
<b>June 2009</b>	<i>Expert meeting</i> Expert Meeting on Gender training curriculum TARGET, Madrid, Spain	<i>Trainers, academics, policymakers</i>	35	<b>UCM Emanuela Lombardo, Maria Bustelo, Maxime Forest, Alba Alonso</b>  <b>RAD, Mieke Verloo</b>  <b>YW, Lut Mergaert</b>  <b>HU, Susanne Baer, Lucy Nowotnick</b>
<b>June 2010</b>	<i>Lecture</i> Master for Gender equality Agents, University Paris 6 La Sorbonne: “Perspectives normatives, intersection du genre avec d'autres discriminations, usage de la comparaison: trois enjeux pour l'analyse des politiques publiques en Europe »	<i>Professionals (long-life learning)</i>	23	<b>UCM, Maxime Forest</b>
<b>September 2010</b>	<i>Lecture in a Steering Group Meeting</i> “The QUING Project Quality in Gender + Equality Policies in Europe. OPERA activity: Focus on Gender Training in Europe”  The European Network on Gender Mainstreaming. Steering Group Meeting, Rome Sept. 23 <sup>rd</sup> -24 <sup>th</sup> 2010.	<i>Experts</i>	60	<b>UCM, María Bustelo</b>
<b>September 2010</b>	<i>Expert Meeting</i> Expert Meeting on Gender Mainstreaming in Europe organised by the  European Institute for Gender Equality (EIGE), Vilnius, Lithuania	<i>Policymakers, academics, gender consultants and trainers</i>	40	<b>UCM</b>  <b>Emanuela Lombardo Maria Bustelo</b>  <b>YW Lut Mergaert</b>  <b>RAD, Mieke Verloo</b>
<b>October 2009</b>	<i>Gender Training</i> „La Igualdad de Oportunidad en la Agenda Europea“, Jornadas	<i>Gender Equality Officers, Regional administration</i>	100	<b>UCM, Maxime Forest</b>

	interadministrativas Género y políticas de Igualdad, Valladolid, Oct. 6	<i>officers</i>		
<b>February 2011</b>	<i>Presentation</i> “The QUING Project Quality in Gender + Equality Policies I Europe. OPERA: Gender Training in Europe” OPERA Final Conference “Advancing Gender+Training in Theory and Practice. An International event for practitioners, experts and commissioners. Madrid, February 3 <sup>rd</sup> , 4 <sup>th</sup> 2011.	<i>Policy makers, public administrators, academics and women’s movement</i>	140	<b>UCM, Mieke Verloo and María Bustelo</b>
<b>March 2011</b>	<i>Lecture</i> “Conocimientos y Competencias para avanzar en la igualdad de género. La formación de género+: el proyecto de investigación QUING-OPERA 2006-2011” II Congreso de políticas públicas de Igualdad de Género. Santander, March 18,19 <sup>th</sup> 2011.	<i>Policy makers, public administrators, academics and women’s movement</i>	200	<b>UCM, María Bustelo</b>
<b>April 2011</b>	<i>Lecture</i> “The QUING Project Quality in Gender + Equality Policies I Europe. OPERA: Gender Training in Europe”. Ciclo de Conferencias Internacionais. Políticas de Igualdade de género: contextos, vozes e designios. Faculdade de Economía da Universidade de Coimbra. April 7 <sup>th</sup> 2011			<b>UCM, María Bustelo</b>

**B) Applying OPERA outputs to gender+ training: Reporting pilot experiences**

More generally, within the time frame of QUING, OPERA findings have been used to enhance the quality of gender training activities carried out outside from the OPERA implementation plan, with the participation of different OPERA team members (individuals and institutions).

✓ *Yellow Window / Madrid team: Gender+ training in Research*

Yellow Window (YW) emphasized the strong relation between OPERA and its most recent (and most important) training and training-the-trainers activities. Indeed, Yellow Window has been awarded a substantial contract with the European Commission under FP7, to perform initially 30 (later 33) trainings in different member states in the field of Gender+ Research, and to develop a Gender Toolkit to be possibly reproduced and mainstreamed. One of the main arguments developed in the tender to secure this contract was that the quality and good practices criteria to be identified in QUING with the participation of Yellow Window would be consecutively applied to the proposed trainings.

The toolkit + training packages were designed to provide the research community with practical tools to integrate gender in FP7 research. Trainings were carried out in a 1 day session format, divided into an introductory morning session and a thematic, experience-based afternoon session in the form of two parallel sessions addressing specific research areas.

Two formats were initially adopted by the consortium formed by Yellow Window with Gender at work ([genderatwork.org](http://genderatwork.org)) and Engender ([engender.eu](http://engender.eu)) along with a pool of field experts. However, insights from the OPERA process resulted in the trainers privileging a multiplier format (advocacy skills, dealing with resistance) over a research community format (participatory, work on actual documents). As such, trainings performed with the core participation of Yellow Window have served both as an empirical testing process of the theories developed in OPERA on gender training and as a source of inputs from the field work in a form of 'action research' model.

For these reasons, the success and perspectives opened up by those trainings can be also credited to OPERA. OPERA team members have also been associated at different stages with reflection on the implementation of curriculum and quality criteria during these trainings. For instance, the latest training carried out in Paris by Yellow Window within the frame of the Gender in FP7 research project (Sept. 24th, 2010) - observed by OPERA team members - implemented several of the quality criteria developed under OPERA. This Toolkit + training format developed under the contract with the EC has been highly praised by commissioners for its quality and adaptability to a wide range of institutional contexts, and was given specific attention among the Women & Science Helsinki group members.

As a first example, in September, 2010, the Spanish Helsinki Group invited Yellow Window to perform a multiplier training targeted towards civil servants and trainers in Spain. A workshop was also held to discuss to what extent such a format is appropriate for Spain and whether it should be adapted to its context and audiences. The Equality Unit of the Spanish Ministry of Science was especially interested in transferring this format. For that purpose, high level officials were trained so that the Spanish research funding programs can be made gender-sensitive and to build gender competence in the Ministry. This training was followed by a meeting with the representative of the Equality Unit to discuss the practical issues involved in the transfer in presence of four OPERA team members. This preliminary contact resulted in establishing cooperation between two QUING partners- Yellow Window and the Madrid UCM team - in order to provide the Spanish Ministry of Science with a Toolkit + training activities in 2011. A licence agreement for the publication of the Toolkit in Spanish was signed by the Spanish Ministry and the EC, and the Gender in Research toolkit has already been translated into Spanish for this purpose.

Within this frame, the opportunity has also emerged, to include a face-to-face training of trainers to our WP 31 activity. This was made possible through collaboration between the UCM team and Yellow Window partner. Two face-to-face training sessions have been organized in cooperation by the UCM team and Yellow Window, with the participation of the head of the Women and Science Unit at the Spanish ministry for Science and innovation, on March, 28-30, 2011 in Madrid. Apart from a training focusing on Gender in FP7 research projects, a 2 days training-of-trainers was then organized that mainly aimed at disseminating OPERA outputs among well-trained and experienced professionals.

Further evidence of knowledge transfer activity closely related to OPERA is the interest expressed by the Gender Equality unit of the French Ministry of Science for a Toolkit + training format strongly committed towards the implementation of quality criteria. First contacts were established with the French member of the Helsinki group, chief of the Gender Equality Unit (MIPADI) at the French Ministry for Science and Research. These preliminary contacts involve both Yellow Window and a QUING Madrid team member and have aimed so far at adapting the definition of curriculum to the French context. In February, 2011, the deputy-head of this Gender Equality Unit attended the final OPERA conference and in April, 2011, a member of the UCM QUING team, Maxime Forest, was hired

as an external expert by the Gender Equality Unit of the French Ministry of Science. He will be committed to the mainstreaming of the OPERA quality criteria for any training activity to be launched in the future by this institution. Due to the success of the initiative, the EC awarded a second contract to Yellow Window to continue offering 'gender in research' training sessions throughout Europe. This second contract was signed on March, 1<sup>st</sup>,2011.

✓ *Berlin Team*

Labs (*Werkstattgespräche*) on "Intersectionality in consultancy work", "Intersectionality in training and civic education" and on "The role of law in antidiscrimination work":

In order to disseminate and further qualify results from the QUING project, and OPERA in particular, HU Berlin organized three "labs" on May 27<sup>th</sup>, July 1<sup>st</sup> and December 2<sup>nd</sup> 2010. That is a specific format of workshops in which new ideas are developed by and discussed with practitioners, trainers, researchers and experts engaged in anti-discrimination work. Invited experts provided impulse presentations about previously defined pending issues in antidiscrimination work, such as: What conceptualisations of inequalities and intersectionality are applied in which kind of training? Which theoretical foundations are referred to when and why? Which competencies are relevant for "good" training and for whom? After short impulse statements that every invited speaker presents from their particular contexts of work and engagement, discussions are initiated between the speakers as well as to a huge extend with the audience as well. Thus, both with regard to content and their participatory and explorative format the "labs" were very well received by the attendees. Each event attracted about 50 participants and can also be seen as a dissemination activity of OPERA findings: The activity proved to be a fruitful add-on module for training of trainers in which trainers can broaden their networks and can share and discuss core questions of trainings with peers. Due to the success of this event, another "lab" has been scheduled for December 2010 in which we will focus on the role of law in anti-discrimination training.

In their shape and content and the attention paid to the issue of intersectionality, these trainings integrated several of the key elements developed through OPERA activities, and provided additional insights for the monitoring of innovations in gender training activities.

#### **4.2 The database: a reliable and updated resource for experts and commissioners**

The OPERA database is a key activity for ensuring the continuation of the Gender+ Training Community of Practices (see: Part III, section 1) beyond the QUING project. The main objectives of this particular activity were to:

1. Ensure the maintenance and high quality of standards for gender+ training
2. Ensure the maintenance and high quality of a database of gender+ trainers
3. Contribute to a higher quality of gender+ equality policies in the Member States of the EU, in the EU and in the candidate countries
4. Select potential parties for maintaining and updating the standards and the database after the lifetime of the QUING project
5. Negotiate the best conditions for the future of high quality standards and database
6. Select the final partner

The Gender+ Trainers Database was creating during the OPERA component and regularly updated. Each update has involved new entries, deletions and updated contact details. A final update was carried out at the end of the QUING project to incorporate the conference participants who were not included in the original Database. It is hoped that at the time of transfer the database will contain around 450 relevant and up-to-date entries. These entries span a broad range of actors and

institutions across the gender+ training community, such as gender+ trainers, knowledge transfer-focussed academics, equality and diversity institutions, policy-makers and commissioning bodies.

The premise behind the transfer of the Database was that the OPERA component had demonstrated that the present moment represents the beginning of an interesting and worthwhile process. However, work remains in order to harness the momentum of this process and ensure a sustainable future for the emerging Community of Practices in Gender+ Training in Europe. The database transfer has a key role to play in this, and the aim is to create possibilities for the role of the database and develop it further. The need for a sustainable process was identified by the gender training community throughout the OPERA component and is reflected in a number of OPERA activities, most specifically the Final Conference and Madrid Declaration. However, as the OPERA team had no resources to continue leading these activities, a clear need emerged for some kind of hand-over to a high quality partner which could develop an important leadership role in the development and promotion of this Community of Practices.

#### *Selection of high quality partner*

Criteria for the selection of the high quality partner were established at the OPERA coordination meeting held in Madrid in June 2010. It was agreed that the key criteria was the following: The willingness and capacity of the selected partner to maintain and enhance the database as a support mechanism for a Community of Practices in the making among Gender+ training practitioners. Based on this criteria, the OPERA team identified the European Institute for Gender Equality (EIGE) as a potential partner. EIGE was selected due to its role as a primary European institution which aims to promote gender equality and provide technical assistance for this. As such, it is well positioned to pursue the further development of a Gender+ Training European community. Preliminary discussions were opened and a more concrete dialogue was established at the OPERA Final Conference with EIGE representative and senior gender mainstreaming expert Barbara Limanowska. Eventually, a phone meeting was held between OPERA and EIGE which established a verbal agreement on terms and conditions. After this, EIGE's legal department produced a contract, which was then approved and signed by both parties and is currently operational.

#### *Expected outcomes of the OPERA Database transfer*

The contract between OPERA and EIGE outlines the key functions of the Database for the future:

- Provide a singular source on information on gender+ trainers across the EU and beyond
- Act as a focal point for facilitating communication between gender+ training Communities of Practice
- Represent a concrete output of the emerging Communities of Practice on gender+ training and contribute to the development of quality standards
- Provide an open resource, i.e. no party will hold exclusive rights over the *Database*

In order to achieve this, EIGE has agreed to carry out a number of activities:

- Provide the necessary software and technical support to host and maintain the database
- Monitor and manage both the content and format of the database
- Assume responsibility for updating contact details as necessary
- Search for new members to continue completing the database by conducting a proactive search of gender+ trainers every twelve months and adding new members to the database
- Publicise the existence of the database to ensure high visibility across the gender+ training Communities of Practice

It is expected that the Database will be fully operational by 1<sup>st</sup> December 2011. In addition to the management and development of the Database, informal discussions with EIGE have raised the

possibility of opportunities for continuing the work of OPERA beyond the QUING project. Potential activities include a gender+ trainers' forum (either online or face to face) and a conference or seminar in 2012 for gender+ trainers. As such, it is hoped that the transfer of the Database will achieve not only the desired objectives, but will also contribute to a sustainable impact for the QUING project.

## Part II.

### Transferring knowledge to *and from* gender training: A reflexive assessment of OPERA

#### 1. Assuming the diversity of audiences and policy sectors in the definition of standards for gender+ training (shifting expectations)

This section briefly gets more into the details, as regarding the continuous adaptation of OPERA to the reality of the field it engaged with. For this reason, it pays specific attention to the shifts from the definition of curriculum standards to the setting of minimum quality criteria (also including curriculums); and from the promotion of best practices to the identification of “practices with potential”. These shifts should be understood in the frame of a highly contextualized activity where policy sectors, audiences and training formats matter and prevent the rough definition of ready-made and easily transferable, universal standards.

##### 1.1 *Training: a highly contextual activity*

The goals of gender+ training are highly context-specific and vary according to the target group, but also the type of organization or administration by which it is commissioned / organized, and the policy sector in which they are applied. As a consequence, defining the goals of a training paying attention to its specific context will strongly impact its content and those goals need to be discussed by commissioners and trainers. It has been assumed in this project, that gender+ training enhances gender+ competences of the individuals in their respective fields of competence. Yet, as it may also affect their values and representation, in a social context where gender and other inequalities are deeply rooted in society, the goals of gender+ training may be also to overcome prejudices and stereotypes around gender. The cognitive dimension of gender+ training, i.e. its capacity to provide knowledge on gender and other inequalities, including findings from gender studies, ethnicity, diversity, age or sexual orientation studies, will also depend on the context where it is carried out. Moreover, a gender+ training is always embedded in the broader context of gender+ equality policies, and aspects such as existing gender machineries, gender mainstreaming history, or available data and expertise on gender+, need to be taken into account when designing gender+ training (see: D43, 2008: 13).

For this reason, defining curriculum and quality standards applicable to gender+ training always results problematic since gender+ training is highly contextual and largely varies in terms of approaches, concepts and methodologies. This makes the quality and content of gender+ training a very sensitive issue. As such, discussions held under OPERA, drawing on experience feedback from a wide variety of geographical and institutional contexts, highlighted the necessity not to create general and too sharply defined standards that would fix a particular meaning of the quality of gender+ training, excluding other definitions and actors that might be included. However, it remains that some guiding principles are requested in order to avoid everything being labeled gender+ training. Beyond general principles (Gender+ training as part of a gender+ equality strategy that aims at building gender+ competence and fostering processes of change within organizations and institutions), these broadly defined ‘standards’ have to be set according to the typology of gender+ training, to which specific goals are attached (discussed in D64 and D65) :

- *Basic awareness training* (providing basic introduction on gender as a social construction and gender & power relation, as well as its intersection with other inequalities. Makes participants aware of the mandate to place gender+ equality at the core of organizational practices and institution goals. Also touches upon participants’ values and representations)

- *Gender+ analysis training* (The goal is to think about participants' own organizations as part of a system of disadvantage, about the role they play in this system and how awareness could be applied to produce change)
- *Gender equality strategy training* (help institutions to develop their own strategic plans, to establish sustainable and concrete commitments toward making the necessary organizational changes. The focus is on identifying priority issues for intervention taking into account their feasibility in terms of resources)

### *Training the trainers: specific challenges*

In OPERA, training the trainers has been considered the best multiplying strategy to be adopted to ensure the diffusion of content and quality standards aiming at enhancing gender+ training and subsequently, competences on gender+ among a variety of actors.

Yet, as it has been extensively discussed in previous deliverables, training the trainers presents specific challenges. While it can be assumed that training-the-trainers activities target people who supposedly do not need to get back to gender+ theory, train-the-trainer training shall nonetheless place the emphasis on the need for trainers to be self-reflective about their own practices since the dependency of gender+ training on contexts implies the need to permanently adapt it in terms of content and methodology. For this purpose, networking with the community of active gender trainers may help to foster self-reflexivity.

However, trainers themselves constitute a rather vague category. Indeed, the pool of those who may eventually be commissioned to facilitate the above-listed gender+ training activities may designate external trainers (who work as consultants for different organizations in one or more specific fields), as well as trainers internal to the organization itself. Among the first sub-category, trainers can present much differentiated profiles, alternatively dominated by characteristics drawing from consultancy, academic, juridical, corporate management and other activities. Such diversity, which is correlated to different practices, methodologies, perspectives and possibly, priorities, makes even greater the need for commonly and widely accepted, though broadly defined, quality criteria. Moreover, since training external trainers produces a resource for change across a whole organization, university-based training may endorse specific relevance for this type of external train-the-trainers training. Generally speaking, among trainers, trainers commissioned to train future trainers surely constitute a specific category, as they are in the frontline to establish quality criteria, define the content of training-the-trainers curricula and the self-definition of what a trainer-of-trainer should be.

### **1.2 From curriculum standards to minimum quality criteria?**

The initial mission statement of OPERA extensively referred to the development of curriculum standards that would ensure the quality of gender training activities, and that would be partly shaped by the output of the analysis performed under other streams of QUING, also reflecting the greater attention of intersecting inequalities. Pilot training were thus expected to identify core elements to be standardized and mainstreamed in the form of specific, thoroughly designed and largely applicable guidelines for quality gender+ training.

Yet, as shown in D65 (*Guidelines for curriculum standards*), the outputs of OPERA to this respect slightly differ from the original mission statement, as these guidelines privileged a reflection on the objectives and meanings of gender+ training over the definition of universal standards, providing gender trainers and commissioners with an *open framework* to be adapted to their own purposes/contexts. The main elements of this framework are briefly addressed below.

### *Gender+ training is about power relations / labels do carry power*

The existence of power relations of gender and its intersections with other inequalities and the need (and challenge) of changing such power relations have to be an integral part of the training. Studies on the implementation of equality policies show strong indicators that purely technical knowledge will not be transformative, but fade in light of the resistance or mere stability of traditional ways of policy making. Hence there is a necessity of carefully balancing constructive political debates and technical arguments, adjusting them to the context and the group composition. It is also important to note that beyond the different understandings of various concepts, labels also do carry power. First, terminology has effects on the inclusion or exclusion of target groups. Experience shows that the label 'gender' attracts mostly women to participate in training activities. Second, terminology signals the political strategy in which the gender+ training is embedded. Therefore, it is important to consider the label carefully.

### *Making the most of the legal context*

In gender+ training activities, many trainers and commissioners as well as participants often refer to the law as an important or even a lead frame for the training. Legal instruments may address questions coming up in a training session, or they may even mandate the training itself. In some countries, equality law more or less directly mandates training, not only for private companies, but also for public policy makers. In Germany for instance, the federal equality law obliges every public employee to work towards equality. For trainers, commissioners and participants, the law may convey a certain authority specifically relevant to the training. It may be the reason why participants have to work towards equality, and thus have to attend the training. For example in Spain, trainers and commissioners report that the 2007 equality law has been a turning point and now provides an important reference, completed in 2011 by the Law on Research, which opens new channels for implementing gender training at different levels. Referring to the legal order may also answer substantive questions as to the goals of equality policy, the measures legally foreseen to achieve these goals, and the limitations equality policies may face. It may also be used to expose the myth of our societies treating all individuals equally and fairly.

Nonetheless, it has been highlighted that regarding the use of law in gender+ trainings, it is important to consider that the law is not neutral: in most EU member states, explicit discrimination based on gender or other grounds has been declared unlawful, but indirect discrimination is far from being eradicated from the legislative order. Additionally, the law is not stable, but changes constantly and trainers need to make sure that they are up to date regarding the laws relevant to the issues they intend to cover. Part of the required legal knowledge is the decisions of the European Court of Justice (ECJ) and highest national courts. Moreover, laws are not always coherent, but may offer contradicting visions of equality.

### *Gender+ theory needed... but what does it include?*

As stated in D65, p.6, gender+ training, as part of a strategy for change and "*to deserve the name, conveys and enhances people's gender+ competence*". Gender theory is the basis of gender+ competence. It provides the conceptual structure within which gender+ relations can be adequately understood and to which practical competences need to be attached. This conceptual framework can help trainees understand which power mechanisms are at work in gender+ inequalities, where gender+ inequalities do occur, how are inequalities maintained and reproduced, and how they can be tackled. Rooting practical tools into a solid conceptual framework is therefore the pre-condition to gain a *transferable and long-lasting result*. Specialized gender+ training targeting people already familiar with gender+ concepts obviously do not need to come back to theoretical frames, but gender+ theory may constitute the large part of an awareness-rising session. By gender+ theory, we mean theories on the structural causes of gender+ inequality, referring to the construction of gender roles and to the creation/reproduction of power privileges. Gender theory entails key concepts, such as: doing gender,

sex/gender debates, feminist debates, hegemonic masculinities, gender dualism and binaries, heteronormativity and queer critiques; intersectionality theory, diversity, social justice and insights from postcolonial theory, critical race theory, disability studies, etc.

*Including intersectionality for truly gender"+ training: some recommendations*

As it has been highlighted in D65 and as it also resulted from discussion held during OPERA workshops, a multilevel and dynamic conceptualization of intersectionality seems most productive to address intersectional inequalities in gender+ trainings: it focuses on the production and possible change of inequalities on all levels of society. The goal is to understand interlocking types of inequalities and to provide tools to analyze policies as to whether or not they take intersectional inequalities into account. It is at this juncture that the "+", as an integral part of gender+ competence acquired during training activities takes shape: for a successful inclusion of intersectionality into the training, the concept must be explicitly part of the theoretical content, but it must also be reflected in methods used and the supporting material. Last but not least, the trainer needs to know how to apply an intersectional perspective onto a policy field and will use this competence to consider intersectionality as a cross-cutting perspective in all parts of the training. This means that the commissioner, in dialogue with the trainer(s), shall reflect on the role intersectionality plays and can play with regard to the context and conditions of gender+ training activities when planning them. As a step taken towards the greater inclusiveness of gender+ training, OPERA designed a checklist, based on self-analysis and self-evaluation, to be used before, during and after the training in order to determine the degree of integration of intersectionality in the session.

The overview of the development of gender+ training in our case-studies, and the thorough analysis of the differentiated institutional and legislative design carried out under LARG, have also made clear that if any curriculum standard was to be shaped, it would be applied in very differentiated contexts, by a plurality of actors. Therefore, shaping more specific curriculum standard would have resulted in both an extremely ambitious and uncertain endeavor that would have made possible to conciliate context specific and yet commonly framed and widely mainstreamed standards for gender+ training. It is for this reason, and taking into account the elements outlined in 1.1, that curriculum standards have been understood as an open framework, whereas considerable efforts have been carried out by OPERA to identify a series of *minimum quality criteria* to be applicable in a variety of situations and contexts, and that would nonetheless captures the essence of what makes a 'quality' Gender+ training a real instrument for actual social and policy change. Understandably, those minimum quality criteria do engage with the issue of content and sketch the basic features indispensable to an effective knowledge transfer in the field of gender and other discriminations. Yet, they cannot be considered as a comprehensive and unified standard of content fixed for once and for all. These criteria, as they were firstly designed in D65 are summarized below, and do insist on the context-specific nature of gender+ training, the minimum content (including gender theory), the methods, the format and the evaluation of training.

**Context:** Gender+ training methodology and content should be adapted to the context the session is set in, to its audience and to the way in which participants may resist the training.

**Commitment:** Gender+ equality objectives become effective only when supported as the highest level of the commissioning organization, and if implemented as a top-down strategy.

**Content:** Gender+ training should include:

- Gender+ theory, constructivist understanding of gender, intersection with other inequalities.
- An introduction to international and European and national legal frameworks.
- Data, facts and figures should be an integral part of the training while keeping a clear focus on the participants' daily work, proposing a good selection of case studies adapted to the audience's field of work and employing material from their own area of work.

- An equation between the training content and the level of knowledge of the participants. Ex-ante questionnaires may be useful to collect information about the participants' knowledge.
- A careful balance between political debates and technical arguments should be achieved. Challenging the participants' beliefs inevitably leads to *resistances* which need to be addressed as they are an integral part of a gender+ training.
- A scrupulous concern for complementing theoretical content with practical approaches. Starting from participants' experiences and making use of their everyday working material works best.

**Transparency:** Transparency of the commissioners about their goals and expectations is essential to the success of gender+ training. Trainers should also be open and clear about their gender+ approach and goals. Transparency in the communication and dissemination of information on gender+ training activity and gender+ equality policies must also be guaranteed.

**Quality of trainers:** Besides manifest training and adult pedagogy skills, gender+ trainers must have specific competences:

- Gender+ competence: knowledge of gender+ theory up to date with current academic debates, research questions and acquaintance with gender analysis instruments.
- Method competence: knowledge of methods and competence in their application.
- Field competence: understanding of the participants' working field, which make the trainers' competence another highly contextual element of gender+ training.
- Personal competence: a personal ability to clearly communicate goals and contents of gender+ training while raising interest and questions.

**Methodology:** The methodology should be tailored to the participants' needs and to the organization's gendered culture. *Participatory and experiential* methodologies offer greater training potential. Most importantly, the training methodology should assess existing *resistances* to gender+ training and develop strategies to deal with those.

**Resources and format:**

**Time:** experience has shown that the length of time devoted to the training should ideally be a minimum of two days to allow for a learning process to take place. When planning the time, attention should be paid to participants' different circumstances (childcare provision might need to be foreseen);

**Venue:** the equipment and the learning environment matter. When choosing a location, its accessibility for all should be ensured. The venue should induce debates and a use of a variety of training methodologies.

- Incentives: motivation for civil servants' and employees' participation in a training activity can increase if the organizing institution offers incentives (certificate of participation; training within working hours). However, incentives can also have some tradeoffs.
- Target: group composition, size, professional field and hierarchies matter and should be considered at the planning stage of training.
- Breaks: social interaction is important for the success of the gender+ training.

**Evaluation:** Monitoring and evaluation procedures should be considered as an integral part of the gender+ training activity to assess how the training activity has been undertaken, whether it can be improved, and ultimately, if it has reached its goals.

Nevertheless, since such definitions cannot be arbitrarily established from above, but should result from an intensive and cumulative dialogue between trainers and academics in order to be further defended and promoted towards commissioners, these criteria have been consecutively widely discussed during the final OPERA conference and the process of consultation that led to the adoption of the OPERA Madrid declaration, producing another sample of basic criteria to be widely accepted among a *community of practitioners* in the making (see: Part III, section 1).

### **1.3 From best practices to 'practices with potential'**

The mapping of training practices in the QUING case studies initially performed under OPERA (See: D29), and the assessment of pilot trainings carried out in Spain, the Luxemburg, Germany and at the level of EU institutions, was committed to the identification of countries with "higher practices of gender training", and of good practices that could be mainstreamed further through OPERA.

Yet, due to the context-specific nature of gender training activities in terms of institutional settings, audiences, objectives or duration, it was soon acknowledged that the quality of practices had to be assessed in relation with these contextual features, and that a good practice could not be labeled best practice because it did work well in one specific context or framework. Therefore, Susan Baer (QUING HU team Berlin) suggested to focus on "practices with potential", i.e. practices offering greater potentiality in terms of negotiation with commissioners, format-setting, applied methodologies, contents, evaluation or self-reflexivity. Once identified or brought to the discussion during OPERA workshops and training activities, these practices with potential were consecutively discussed among the broader community of practitioners that was established through the on-line for a and the final conference.

## **2. Discussing methodologies of gender training: learning from practitioners**

This section engages with another dimension of gender training (applied methodologies), and another aspect of our approach (learning from practitioners). It offers a summary of our rich debates that took place in the QUING Community of Practice over experiential and participatory methods, and also an overview of alternative or issue- and context-specific methods developed by gender trainers. It covers a broad range of discussions, which contribute substantively to our understanding of such methodologies. The key issues debated during these discussions were: how to define participatory and experiential methodologies; what, if any, preconditions are required for implementing such methodologies; whether it is useful to distinguish between participatory and experiential methodologies; and what kinds of resistances tend to arise to such methods and how can these be tackled. An overview of these debates with the most pertinent contributions is outlined here.

### **2.1 Experiential methodologies**

*Providing working definitions to experiential methodologies*

A first point from which to begin a discussion of experiential methods is to search for a common definition and try to agree on what such methods might consist of. A rough working definition of an experiential methodology was posed at the beginning of this debate in order to try to reach an agreement between practitioners:

*'A methodology for teaching-learning which is based on - or at least take serious and systematically into account - the real experiences the trainees have in their own professional and/or personal life. This kind of methodology is obviously to a certain extent an 'inductive' methodology, trying to build the learning experience upon the particular experiences and situations of the trainees.'*

In more practical terms, it was suggested that:

*'A 'real' experiential methodology does not uses examples from trainees' experiences as 'excuses' for making the trainer's point, but rather one that transforms those concrete experiences into 'general' guidelines, theories or explanations that might be useful for all. An experiential methodology uses different pedagogical techniques which help to 'take out' or 'make explicit' the trainees' experiences.'*

To guide the discussion more specifically, participant practitioners were asked to consider the content of experiential methods, taking into account a number of issues: minimum characteristics that must be present in order to label a training method as 'experiential'; particular tutorial and communication techniques to be used; and examples from practitioners' own experiences with experiential methods. The aim in particular of the definition set out above is to try to differentiate between a 'real' experiential methodology, which really takes into account trainees experiences, and 'using' trainees experiential 'references' to make our points as trainers. There is always a danger of searching for the good examples that trainees might pose, and then using those that help the trainer to make a point. Is this a useful distinction? A very interesting point was immediately raised in response to this:

*'I wonder how difficult it is for the trainer to effectively work with these experiential examples and input from the participants, if they do not quite 'fit' the points you want to make as a trainer. How 'disturbing' is this for the planning of your training session? Don't you lose your grip on the contents and time planning then? Or is a condition then that you have ample time, or at least a series of training sessions where you can build on these types of inputs?'*

*Are there preconditions for using an experiential methodology?*

This point was picked up for further discussion by another practitioner, who suggested that there may be some preconditions for a training that wants to use experiential methodologies. In terms of planning the training session, perhaps the 'experiential' element referred to above is especially relevant in the warming up stage of the training, when questions are raised in the initial brainstorming. If trainers are short of time, working with people's inputs to the discussion in all sessions can be difficult.

The discussion then continued with the suggestion that a trainer should be able to find a 'middle point' between planning and using a real experiential methodology which really utilises trainees' experiences to try to construct generalisations from them. This is more challenging in situations in which the trainer is short of time. This is a recurrent theme across the discussions with practitioners – that while it is important to be 'practical', trainers should also be aware that the purpose of an experiential methodology is that it inductively contributes to the training in itself, and up to a certain point should be ready to question and adapt what has been prepared in advance. A further contribution suggested that this distinction makes sense as it allows us to think about the links between participatory training in the field - when you are concretely doing the training - and participatory design of the training itself. She added from personal experience that *'quite often it happened to me that I realized once the training already started that it would have been better to have access to participants' experiences in order to design and shape the training itself, which is seldom possible'*.

A few points were submitted for discussions as regards preconditions for using experiential/participatory methods, for example:

- In terms of audience - type, size, degree of diversity/homogeneity in terms of field, role, position, etc.?
- In terms of time - duration, timelines, frequency of the training?
- Elements to be agreed upon with commissioners?

A useful experience was shared by a gender expert:

*'Our experience has shown that the room set-up is important to allow participatory techniques to work effectively. Flexible seating, so that chairs can be u-shaped as the 'basic' set-up so that participants face each other and that the trainer can move, walk in the middle. Room size adapted to the group, so that participants cannot go and hide away somewhere in the back to be avoided: amphitheatre style*

rooms with fixed chairs (auditorium).’ This point was debated by a commissioner, who said that ‘even if the space is appropriate, there could be a closed atmosphere. So, it is important that the trainer’s attitude be open to participation, feedback and judgements.’ This point takes us back to one of the over-arching themes of discussions with practitioners - the need for self-reflection and flexibility on the part of the trainer, being ready to change strategies, topics or examples. These points were then backed up with personal experience from a gender trainer:

*‘The last two comments on type of room and trainer’s attitude are very important, I think. I remember once an amphitheatre room with a great distance between trainer and participants and the results in terms of participation were undermined indeed! The physical distance discouraged participation and created a sense of hierarchy. So I share the idea of a good environment and the possibility to have materials to do work in groups. The point made about the openness of trainers is also very relevant. It requires trainers to be open to be challenged themselves. This attitude seems to be a quality criterion for training, as it opens up the possibility of trainers to challenge their own biases and comfort zones. Yet, it also requires good skills from trainers, so to be able to deal with challenges posed and use them as ways to advance in the discussion of the gender problematic, doesn’t it?’*

A useful contribution to this debate was then made by a gender expert, who argued that:

*‘Of course the physical conditions are important but I have had experiential experiences in lecture halls. It is more difficult but it can be made if the pedagogical contract is clear and the methodologies are in accordance. On the contrary in sitting in a u shape does not in my experience indicate necessarily that this ‘magic’ of genuine dialogue will happen. Building trust in a group is a huge challenge that to me is an important precondition for participatory experience.’*

#### *Adapting experiential methodologies to contents and formats*

Adding to this debate, a commissioner from a public institution added a useful practical experience and presented the particular challenges posed by online training when attempting to use experiential methodologies. She argued that this is more difficult in a basic online gender training where participants have no previous knowledge about gender. However, training for professionals which spans three different topics - employment, human resources and social affairs – presents more opportunities for experiential methods, as the trainees can put into practice all they have learnt in their professional/personal experiences. In terms of on-site training, this aims to tutor the trainees so that they learn: what does the mainstreaming process consist of? Which elements do they have to use? And also it put them in touch with the tools that exist in order to put them into practice in their fields of action or even in their own work. This point therefore raised a very important issue regarding different types of training, leading to a further set of questions to guide the discussion:

- Is it more difficult to use an experiential methodology in on-line than face to face courses?
- In order for a method to be genuinely 'experiential' is some knowledge or experience in the field in which the trainees work necessary?
- Can we use an experiential methodology for 'basic' training courses?

An interesting perspective was provided by a gender trainer, who suggested that:

*‘I would think that to some extent all trainings try to incorporate techniques based on experiential methodologies, but some trainings would mainly work through this approach. There is, I think, an incentive in gender+ training to encourage participants to speak from (their own) experiences; this incentive is partly derived from feminist epistemology more generally. However, experiences may be shared for the purpose of learning and sharing (assuming there are commonalities among the*

*trainees), but they may also be shared for the purpose of being challenged. There are some examples of race critical approaches, where trainees are 'pushed' to challenge their own experiences.'*

She added a further set of questions to be taken into account in this discussion: 'Would experiential methods apply to both? How are the 'standpoints' (to use another term from feminist epistemology) of trainees taken into account in defining experiential methods?'

Another gender trainer agreed with this basic approach of starting from people's experience and added that this could be complemented by using appropriate and relevant documents. However, she also suggested that it is important to keep in mind that 'challenging certain biases should be an aim of training. That is, the aim is a collective reflection about gender inequalities and possibilities of changing.' She then suggested it would be useful to look at the critical race studies approaches. The conversation continued with a suggestion that the trainer's experience should be taken into account 'both for sharing and for challenging what is being said or discussed. In this sense, what was discussed above about helping them to be aware of what they do - or not do - about gender, could be the next step after considering the different experiences. For example using own personal experiences where the trainees have felt in a situation of discrimination or inequality might function as a good practice.

Continuing the discussion of practical approaches, the issue of heterogeneity in a gender training was then raised, with the question: is it more difficult to apply experiential methodologies the more heterogeneous a group? Could it be possible that using different experiences from the trainees, and with enough ability in the part of the trainer, the exchange and feedback of different experiences might be enriched? This was identified as an important issue for gender training in general, going beyond the use of experiential/participatory methodologies. A gender expert also suggested that:

*'(T)he creation of a learning experiential experience requires in our opinion some enabling conditions that not always - and I would say only occasionally – exist in both on-line and on-site training:*

- 1. Time - more time than conventional training projects*
- 2. Capacity to LISTEN to what each person says both verbally and non-verbally*
- 3. Build bridges between different experiences and try to find commonalities and differences*
- 4. Don't hide conflicts and tensions, work with them*
- 5. Deconstruct experiences to recognize assumptions, beliefs, political views etc.*
- 6. Relate experiences to theory and vice versa*
- 7. Stimulate innovation in the way experiences are presented and/or planned*
- 8. Problematize the idealization of experiences as well as denigration'*

## **2.2 Participatory methods**

*Providing working definitions for participatory methods*

Moving on to looking at participatory methods, a working definition was proposed for debate:

*'A methodology for teaching-learning which is based on the active participation of the trainees during the training period. This methodology is based on the benefits of active learning, both for a better cognitive and experiential grasping of the training contents and aims, and for a sense of appropriation of those contents on the trainees' side. A participatory methodology uses different pedagogical techniques which makes trainees active in different ways during the training period. These techniques not only facilitate trainees' reaction to trainer's proposals, but also give room to trainees' ideas and proposals.'*

In terms of specific points for discussion, the following were suggested:

- Minimum characteristics to be present to label a method of training as truly “participatory”
- Tutorial and communicational techniques to be represented
- Exemplification through your OWN experimentation of participatory methods
- Are the differences between a participatory methodology and an experiential one clear?
- Should they always go together or not necessarily?

The debate began with a contribution from a gender trainer:

*‘Using a participatory method means in my view to learn by practicing some knowledge in a group, so not just listening to what trainers tell you but actually doing it. It involves on the part of trainers the planning of work in groups using documents that resonate to the trainees. One thing that seems a bit difficult to foresee is how particular groups will react to a particular type of work in group or document. Some groups are more active and enter sooner into group work, others less so; some like to work with documents which others don't like... How best to ensure people's participation in a training, given the variety of people's experiences and ways of being? Are there any single recipes?’*

This definition was challenged by a gender expert, who pointed out that participatory does not necessarily mean in 'groups', it can be in the plenary too. She added a practical example: *‘When for example the trainer asks the group for suggestions, jotting down the ideas on a flip chart, and all the ideas together start to build the more global picture... Then participants who do not immediately feel ‘ready’ to contribute can decide to stay in their comfort zone and not come forward.’*

The original contributor agreed with this, then reflected more broadly on the distinction between experiential and participatory methods posed at the beginning, arguing that they do seem to overlap to the extent that by participating you share experiences and make experience of knowledge by doing. However, she was not clear of the analytical advantage of distinguishing between them.’ The moderator then clarified that the purpose of distinguishing between experiential and participatory methodologies is that they are different in nature. The first uses trainees' experiences for training purposes and the second pursues making trainees participate during the training process and this is based on the convention of active learning. ‘However’, she added, ‘I also think they are complementary, but it could also happen that they do not need each other. For example, you can prepare a training taking into account trainees’ experiences, for example through texts or a questionnaire, or you can use participatory techniques without experiential ones.’ She rephrased the original question to clarify the debate:

*Should they go together? Or how we can use synergies in using both?*

A gender trainer then reflected on this and suggested that:

*‘If we mean experiential methodology as previous ideas or experiences that trainees have, and transform these experiences into contents of the training, then we understand that both methodologies are complementary. Whenever we talk about an experiential methodology it must be participatory, but not necessarily the other way round.’* However, this point was contested, as it does not seem to make sense. If an experiential methodology is required, it is almost certain that a participatory method will be selected as much as is feasible’. The conversation was then closed with a personal experience from a gender training context:

*‘In the trainings that we deliver, we normally need to assess some of the trainees’ prior experiences in any case, so that we can also assess what the impact of the training has been through a post-questionnaire and repeat-questionnaire several months after the training. ‘Participatory techniques’ are indeed more about the interactions among participants. My understanding of ‘experiential*

*methods' is more in line with feminist epistemologies and goes a bit beyond interrogating trainees about specific professional experiences or knowledge or skills.'*

The discussion then moved back to a more conceptual level in terms of tackling the distinction/compatibility between experiential and participatory methods:

*'We believe that a methodology can be participatory and not experiential but an experiential methodology should always be participatory. We consider that the experiential methodology in gender training is the most indicated, because this kind of training aims not only to increase knowledge but to change attitudes. The aim is to change beliefs in order to look at reality from another point of view. This need starts from the analysis of the own beliefs and experiences (from all trainees) to remove them and to build another view of reality. This methodology needs time (it is difficult to do in a training of two or three hours) and some continuity.'*

In conclusion, the debate with practitioners about participatory and experiential methodologies and methods set out a broad range of perspectives and provoked rich discussions. Gender trainers shared experiences which were able to enliven the debate and ground it in real-life examples of the complexity of the gender training process. The points raised and discussed contribute substantively to our understanding of methods in gender training, and the limitations and challenges and rewards of adopting participatory and experiential methodologies.

#### *Potential resistances to experiential/participatory methodologies*

Building on these discussions, the conversation moved on to explore resistances to experiential/participatory methods. Some additional framing questions were posed:

- To what extent is it possible/easy to articulate participatory methods with more driven approaches?
- How to (kindly) overcome resistances without necessarily developing a separate training agenda for those trainees who hardly engage into participatory or experience-based interaction?

A gender expert began by sharing an experience of difficulties with participatory techniques in Eastern European contexts. She wondered if this was a matter of cultural differences. Are people in these countries not used to these forms of techniques in a training setting? She recounted experiences of *'participants who almost literally freeze and try hard to make themselves invisible when a participatory technique is introduced; wanting to dive under their tables; hide away and disappear... Some indeed do not come back after coffee or lunch break...'* A gender trainer then complemented this with a comparative context: *'I'm not familiar with training in Eastern Europe, but I have noticed cultural differences that favour or undermine participatory methods. This is a generalization, as it depends a lot on the types of groups, but when teaching in UK universities it was more difficult to stimulate students' participation than it is in Spain. I don't know how it is in a training context - whether these cultural differences show up and how do trainers face them.'* A further gender expert shared her experiences in this area: *'I have also noticed that there are sometimes people who feel terribly uncomfortable with participatory methods and then one just has to provide some optional 'work' for them. Isn't it so that the trainer has to be able to manage a set of different methods or tools for varying situations and contexts? Gender sensitivity requires also methodological sensitivity.'*

It was then suggested that the educational background of participants was relevant. For example, it would be expected that participatory methods would be most appropriate when they draw upon previous experience of encouraged participation (at school, at university or even within the targeted organization itself). When it is a passive or submissive attitude that is usually praised by the institution

(be it the School, the Administration or the company), it is likely that resistances will be significant. A further practical point was then raised by a gender expert, was that *'training materials that were drawn from participants' own work for a participatory exercise (group work) triggered resistance because the material seemed 'too close' to them. Participants reacted defensively, as if they felt criticised for 'insufficiently gender-sensitive performance of their work'*. As shown in the previous debate, not only physical aspects help to create a positive environment, but also - and especially - trainees' attitudes and openness to participatory approaches. It may be that cultural differences such as the ones described for some experiences in the Eastern European countries - whether due to not being used to them or shyness are easier to overcome, for example with more time - than initial negative attitudes to the gender training itself. In any case, it seems that we should pay serious attention to them and allow time, special techniques and a good dose of patience for creating the appropriate conditions for such methodologies.

### **3. Discussing knowledge transfer theory: who (can) resist gender+ training?**

The issue of resistances has received a large amount of attention in OPERA activities. Here, it will be framed in a broader perspective in order to address the different faces of this multi-layered phenomenon. We will firstly address the issue of transferring Gender knowledge (in particular, gender theory) outside academia. Then, we will pay attention to the political economy of knowledge circulation among gender training practitioners, including potential resistances towards sharing information and the diffusion of 'best practices'. Finally, we will frame the resistances from trainees and from potential commissioners as a diverse phenomenon, both individual and institutional.

#### **3.1 Some challenges in transferring Gender knowledge outside Academia**

##### *The "jargon issue"*

A recurrent issue tackled during OPERA workshops, has brought into the discussion the need to prevent the diffusion of a new jargon through gender training activities. For instance, Lut Mergaert emphasized that in the toolkit Gender in research developed by Yellow Window, Engender and GenderatWork, a more practical approach was preferred to the use of the gender mainstreaming vocabulary. De-jargonizing gender training might include limiting the use of acronyms. More generally, we addressed the following question: Why does jargon get in the way of knowledge transfer? In response, we considered the need to tap into level of knowledge underneath the jargon. Another related issue was that in the respective fields where gender trainers intervene, their own jargon possibly interferes with the one privileged in the field. Transferring knowledge might be better achieved when trainers— at least partly – adopt or refer to the language used in a concrete field as Research project management, for instance.

##### *Participatory learning for trainers and peer reviewing*

Discussions held under this chapter demonstrated the need to produce knowledge on the *process* of gender training, as illustrated in the forthcoming book by Jeanette Van de Sanden drawing upon her PhD thesis on *Transferring Knowledge about Sex and Gender*. Yet, as shown by Maria Bustelo, producing knowledge on gender training supposes a participatory kind of learning to be present among trainers, which highly depends on the cultural context. Indeed, supervision or peer evaluation that better produces knowledge on a process in the making is given different levels of awareness according to the context. In Spain, just as in France, it opposes the "Libertad de catedra"/ "autonomie de l'enseignant" (Autonomy of the teacher) and would be seen as interference. Nevertheless, since gender training is not teaching, some tolerance towards peer evaluation could be fostered among trainers, in order to help them to build up their own capacities.

In the case of one-day trainings divided into morning/afternoon sessions, information (for instance, about trainees' backgrounds and resistances) can be easily gathered during the morning

session and passed over to the afternoon trainer. We considered also an appropriate way to gather experience on the process of training to perform some extensive interviews with experienced trainers. This, however, would require developing specific channels to tap the knowledge that accumulates while practicing – especially as people do not always “know exactly what they know” - and to translate it to the level of academic expertise.

An important point highlighted in our discussions was that it was part of the objectives of QUING and OPERA to generate a (mostly missing) literature on training methodology, and, once we get the pieces of the puzzle, to arrange them in the form of a consistent theoretical body. This is especially needed as all gender trainers understand the theory of training but cannot necessarily write it down. At the same time, we have been dealing with professionals with a background of significant autonomy which they are eager to preserve. This is precisely why we considered it was important to *collectively* develop guidelines and standards so that they can be better appropriated and multiplied. Simultaneously, we engaged with the fact that including within OPERA, academics tend to consider that Gender training does not draw on theory.

### **3.2 The political economy of knowledge circulation among gender training practitioners**

#### *Gender+ training as a market of skills and competences*

Discussions held during TARGET-OPERA expert meetings in Berlin, Nijmegen, Boston and Madrid have led to emphasize the marketization of Gender+ training activities across Europe. Marketization not only tends to shape what gender training looks like; it also makes the tools and methodological approaches developed by trainers a matter of competitiveness, as trainers need to sell their competences on a developing market. This market, however, does not have neither certification / accreditation instances nor commonly accepted quality criteria. It is shaped around a number of sub-markets/arenas linked to concrete gender issues or mechanisms (mainstreaming, Gender-based violence, Gender and Justice, Development, participation, etc.) and specific institutional and organizational arenas.

The absence of rules and accreditation procedure (be it informal, for instance through the socialization within a CoP) introduce strong concerns as regarding the willingness of trainers to share knowledge, tools and experience. The Community of Practice OPERA aimed to launch through three on-line forums and later through the final conference, attempted to take into account the competitive issues of trust, “fair use” and honesty about sources and credits. In their terms of conditions and functioning mode, the online forums thus placed the emphasis on the importance of a fair exchange. As it emerged from previous discussions, trainers appreciate the tools they have developed to be used and improved by others, but at the same time, they need to promote it in a competitive context. From this point of view, academics, which are also part of this community, are placed in quite different situation, since they are committed with knowledge diffusion.

Additionally, it is clear that domestic contexts matter as regarding the degree of competitiveness and reluctance to share information. In some countries, like Germany, training activities already constitute a rather stabilized market where actors are strongly competing to promote their skills and methodologies. On the contrary, it seems that other contexts are more favorable to exchange and knowledge diffusion. Given its international dimension, our community has taken into account these different situations and intended to provide basic guarantees of fairness and privacy. But at the same time, it advocated the idea that knowledge doesn't grow unless it is shared. This, however, implies to make sharing easier and more attractive keeping in mind that all practitioners need support networks to complement what they do in practice with others experiences as well as theoretical inputs.

The social construction of knowledge, we assumed, needs to be collective, but this construction can face resistances, especially among professionals who enjoy a relatively strong

autonomy in the development of their pedagogical skills. We expect that the common need to overcome resistances about gender+ equality faced by gender+ trainers, as well as the on-going discussions on experiential-participatory methodologies and the inclusion of intersectionality to gender training will encourage participants to the on-line forums to actively share ideas, references, methodologies and experiences. The on-line forums and the working sessions held during the Final conference thus also aimed at making sharing easier by abolishing hierarchies between trainers, facilitating self-reflexivity and providing new theoretical support.

It remains, though, that the Final conference has proven the eagerness of gender trainers to share about their practices and experiences in a safe environment, as far as the full participation of every member of the community is encouraged.

### **3.3 Dealing with resistances to gender training: a multi-level challenge**

Potential resistances to/in gender+ training activities have been giving increased relevance and attention over the OPERA time span, as it soon appeared that dealing with different forms of resistances, located at different levels (organizational, institutional, collective or individual) was one of the main challenges faced by practitioners, for which they need the most to engage in experience-sharing. The broad issue of resistances was thus given specific relevance during the OPERA and TARGET workshops, was consecutively tackled through an issue-specific on-line forum and constituted one of the streams addressed during the Final conference. From these extensive discussions, which involved practitioners, academics and commissioners from different countries and continents (including Spain, Germany, Italy, Argentina, Switzerland, Austria, the United States or Lithuania), it became clear that resistances to gender+ training are both a common and diverse phenomenon. They may take a number of forms, such as denial of the relevance of the gender+ equality policies, refusal to accept responsibility for dealing with gender+ equality policies or simply through non-implementation. Moreover, these different forms of resistances are located at different levels, from individual to institutional, and do not only involve commissioners and trainees, but also trainers themselves, as those may prove reluctant to question their own attitudes, methods or knowledge.

*Where do resistances come from?*

Knowledge transfer may always confront with resistances. Yet, it has been emphasized that resistances to gender training are of a specific nature. This was pointed out by a Spanish trainer, for whom resistances “*are in part connected to a wide shift that it is not only linked to new forms of management, implementation, design of measures, but also to new approaches that also concern private life. I think trainees feel destabilized (sometimes also empowered to change “male”- oriented patterns) when issues like reconciliation, care provision, violence, promotion in the labour market, leisure time... are tackled. I think we are not just speaking about technical issues, we are proposing new approaches to manage or to redefine the personal domain as well.*” In relation with this assumed intrusiveness of gender training, at least three discourses can be articulated:

USELESSNESS: “*this (gender equality) is an old-fashioned issue since women and men are equally situated in employment, social life... so a gender equality debate is useless*”

CULTURALIZATION of the PROBLEM: *gender inequality only concerns to other cultures, so gender inequality is alien to our domestic context/citizens.’*

DO NOT COMPLICATE THINGS: *there is an implicit or even explicit discourse based on the idea that introducing a gender perspective means just making issues more complicated. It is like “society works smoothly, mistakes will be solved naturally”. This is of course closely connected with a liberal discourse based on merit and “gender-neutral” capacities.’*

As resistance to G+T comes from the fact that trainers are expected to question existing beliefs, paradigms and social position, discussions thus highlighted that space and time were needed to overcome resistances – space for relationships on different power relations, participations, breaking conventions, creating communication and knowledge (overcoming expectation of lecturing to construct knowledge collectively on a different basis in actual relations). Need to break traditional training space defined – is knowledge focused on the trainer or is it in all of us? Where/how does power get generated through training itself? What would space look like if we wanted to construct and reconstruct relationships through training. As it has been emphasized, time is also needed for this process and this is a very scarce and valuable resource, particularly in gender trainings.

*Are trainers exempt from resistances?*

Resistances do not occur only among commissioners and participants; trainers also experience resistances themselves to G+ on both the cognitive and the emotional level. There are cognitive and emotional barriers in what trainers experience in racism, xenophobia etc. It is therefore important to identify and distinguish different categories of resistance and how they shape/limit the impact of training. It was also highlighted that when confronted to rather unarticulated resistances from the trainees, trainers themselves are likely to engage in confrontation, rather than adopting a reflexive and positive attitude. As resistances from the trainees are likely to undermine trainers' authority and legitimacy, and possibly to question their own identity, beliefs and values, they do constitute a permanent challenge for trainers, that requires added efforts in terms of self-reflexivity and evaluation. In dealing with resistances, trainers can so far mostly draw upon their own, cumulative experience. This relative isolation has been illustrated by their eagerness to share about these situations with peers. For instance, according to the final conference evaluation, sessions on resistances were scored high among participants, as it engaged with a truly challenging and largely disregarded aspect of gender+ training.

It has also been pointed out, that commissioners are not necessarily representatives of the master's house and it was thus suggested to look outside confrontational role as a better way of enlisting commissioners for providing better conditions, not only in terms of time and space. Commissioners can be allies inside the master's house and from there building networks and alliances as foundation for change

*What can we learn from resistances?*

Finally, dealing with resistances also entails a reflection on the transformative potential of gender+ training. In other terms, it has been discussed whether a truly transformative training had necessarily to produce some degree of resistance. In fact, it appeared that gender+ training, as far as it aims to produce social and organizational change, has to fully engage with trainees' anchored values, beliefs and stereotypes and therefore, can hardly spare a certain level of confrontation. Yet, resistances to gender+ training, when occurring, should be embraced and dealt with as part of a necessary process of organizational, institutional, societal and personal change.

## **Part. III Making OPERA outputs sustainable and transferrable**

### **1. Towards a Community of Practices?**

This section places the emphasis on the contribution of OPERA to the development of a network of gender experts, involving a variety of actors. It assesses the synergies developed with the TARGET network and other gender expert networks. It also analyses the foundations, the promises and the potential pitfalls of the Community of Practices OPERA has attempted to launch, and the contribution of the Madrid declaration on Gender+ training to the future of this community.

#### **1.1 Synergies between OPERA, TARGET and other Gender expert networks**

*TARGET: a transatlantic project designed in synergy with QUING*

The Transnational Applied Research in Gender Equity Training consortium (TARGET-ATLANTIS) was launched in November, 2007 and ran until November, 2009, with a joint EU-US funding. As stated in its own narrative<sup>3</sup>, “this co-operative policy-focused research project proposes to: (1) draw on the expertise of EU researchers to develop evaluation criteria for gender mainstreaming training in US development projects, with the UW-Madison producing a database of gender expertise and training programs in the US ; (2) compare this US development focused gender mainstreaming to that conducted within the EU among the member states, to identify context-specific differences in training needs and enhance the focus on race/ethnic and other types of intersectional inequalities in gender mainstreaming training; (3) conduct four expert workshops, one in the US and three in the EU, to specifically identify best practices in gender mainstreaming training with regard to content (HU Berlin), methodology (RAD Nijmegen) and curriculum standards (UCM Madrid), as well as for outreach into third country development for “training the trainers” (NU Boston); (4) develop a curriculum manual for EU trainers and disseminate best practices for teaching the gender mainstreaming approach both within the EU and US and in third countries, both by making data and reports available on the web, and by publishing and presenting the research results in academic and applied contexts”. The main expected results of TARGET were the establishment of database on gender training experts and programs; a manual on gender training practices, curricula, and standards; the participation in conferences and workshops to disseminate results to policy makers and academics.

Comparisons within and between the US and EU in training practices, curricula, methods, and standards were expected to promote a higher quality mainstreaming of gender into policymaking by learning from existing best practices, and promote the development of specific training programs in gender and women’s studies and area studies of development that will refine and improve the educational standards for gender expertise.

Just as QUING-OPERA, TARGET was explicitly designed as a step toward developing curriculum and tailoring research training to address this significant and growing need for gender policy experts and for teachers able to effectively train policy actors. Composed of five major institutions (three in the EU and two in the US), TARGET brings together a wide range of experience in gender mainstreaming across EU and third-country contexts. From its very beginning, it aimed at drawing upon the experience of EU institutions which are doing significant research on training, to allow US agencies to build on their assessments of needs and begin to develop gender training criteria also. Conversely, as most of EU research has focused on mainstreaming within member states, it was expected that such dialogue would benefit to European research. Moreover, it was emphasized that in the US, gender policies have long engaged with the intersections between gender,

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<sup>3</sup> <http://www.ssc.wisc.edu/gender/Research/ATLANTIS-TARGETnarrative-FINAL.pdf>, date accessed: 05.12.2011

race, class and other significant markers of difference among women, whereas this form of analysis was only emerging in the EU, but was central to QUING's mission.

#### *Synergies with OPERA: broadening the scope*

As underlined in the narrative of TARGET, "the OPERA project looks at gender training in a comparative context within the EU across all policy areas. As a result, policy agencies working on third-country development assistance are implicitly included, but only occupy a marginal position in the overall assessment of EU gender mainstreaming policy". Instead, TARGET has aimed to include comparison of how the EU and its member states do gender mainstreaming training targeted at other countries, thus facilitating comparison with the US. Additionally, drawing on findings about intersectionality in US policy, TARGET was expected to offer a nice comparison to the analysis of how race, ethnicity or religion intersect with gender equality policies in the EU.

In more technical terms, it was underlined that OPERA was not designed to systematically compare gender training in Europe to that in the US, or to organize expert meetings with relevant gender trainers to discuss both content and methodology of curricula for gender training, while these supplemental activities are crucial for identifying best practices. EU-based workshops were conceived as a venue for exchanging knowledge on gender training with a distinctive focus on the specific elements of content, methods and standards for gender training. In particular, the expert meeting held at Humboldt University of Berlin focused on *content* of training. The expert meeting held in Radboud University in Nijmegen focused on the *methodology* of training. And finally, the expert meeting held at the University Complutense of Madrid discussed *curriculum standards* for gender training for policy makers, politicians and public administrators.

Expected convergence between OPERA, as a project providing the research background on gender+ training, and TARGET, as a mean to broaden comparison and facilitating experts meetings, did fully work, as shown by the highly integrated agendas of the two projects, and the regular collaborations maintained between both teams in 2007-2009. This has been made possible due to the participation of two QUING consortium members, the Humboldt University in Berlin, and the Complutense University in Madrid, to the TARGET consortium, as well as the participation of Mieke Verloo's co-hosting institution, the Radboud University of Nijmegen, to the TARGET project. It is also relevant to stress that this cooperation has been maintained beyond the funded period of TARGET, thus enabling the participation of TARGET researchers at the University of Wisconsin to the three on line for a held in 2010.

The main contribution made by TARGET to the achievements of OPERA, is certainly the making of a transatlantic community of practitioners who collectively and regularly engaged with a same set of issues and problematics, drawing upon an increased variety of policy and institutional contexts. This is also to be illustrated by the composition of the gender trainers database.

#### *Synergies with other experts' networks*

Other contacts have been established and developed over the QUING period, with emerging experts' networks on gender mainstreaming in Europe, which were especially valuable for OPERA. This was especially the case for the network on gender mainstreaming being established with the support of the EU commission, with the University of Linköping, Sweden, as central partner. This led to the active participation of Ann-Charlott Callerstig to the Final OPERA conference.

### **1.2 A Community of Practices among the actors of Gender+ training in Europe**

Building a Community of Practice (CoP) among Gender training practitioners emerged as a valid option as result of the changes introduced in the initial content and implementation plan of the OPERA activity. On the one hand, these changes, detailed in D57, originated in the material impossibility, in terms of time, human and financial resources, to carry out the tasks genuinely planned

by WP31 – that is, offering a ‘training the trainers’ activity for the QUING researchers in the eleven partner’s teams. On the other hand, it also resulted from the unexpected achievements of OPERA, such as an ample and well-spread community of gender+ training experts in synergy with the TARGET project, or the identification of gender trainers’ challenges, needs, and concerns. In particular, from discussions during expert meetings and work sessions held under QUING/OPERA and TARGET, as reported for instance in D64, the need for a “community of good practices between gender trainers” emerged, which supposed a significant shift from performing training-the-trainers activities in a face-to-face format towards an on-line training community. Converting training-the-trainers activities into 3 on-line monographic one-day forums moderated by OPERA team members and opened to the network of gender+ training experts built through the synergy between OPERA and TARGET, has thus made necessary to collectively engage with the notion of Community of Practice (CoP), increasingly praised in knowledge transfer literature and learning theory.

As detailed in D57 (*Manual for Gender Trainers: Guidelines towards a community of practice among Gender+ trainers in Europe*), the notion of Community of Practice stems from a more extensive understanding of learning processes that opposes to the general assumption that learning 'has a beginning and an end; that it is best separated from the rest of our activities; and that it is the result of teaching' (Wenger 1998: 3)<sup>4</sup>. Instead, social anthropologist Jean Lave and pedagogue Etienne Wenger embraced learning as social process that largely draws upon experience in daily life. This assumption was the basis for a significant rethinking of learning theory, in which the Community of Practice, as the location for this interactive process, has been given specific relevance. In that sense, “Communities of practice are formed by people who engage in a process of collective learning in a shared domain of human endeavor (...) (they) are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (Wenger, 2007)<sup>5</sup>. Put in more normative terms, a CoP is supposed to foster the collective involvement of practitioners in a concrete area of interest and expertise into joint activities and discussions, and sharing of information.

It was thus thought to be both appropriate and challenging to enhance the capacity and the willingness of different categories of gender training practitioners to join in a cumulative effort aiming at strengthening their activities, thanks to the circulation of ‘practices with potential’, to the mutualization of the reflection on resistances and to the collective validation of quality standards. Indeed, a CoP appeared as an appropriate means to trigger self-reflexivity among a community still in the making, but which definitely share a same ‘domain of human endeavor’, a number of learning and communication techniques, the willingness to learn how to make gender training better and, at least in the case of gender experts approached through the QUING/OPERA and TARGET projects, a broadly defined common aim: enhancing gender-sensitivity and fostering gender equality (understood in a more inclusive way) in human organizations. Additionally, OPERA activities have shown that the definition of curriculum and quality standards is a very sensitive issue as gender training may vary in terms of approaches, concepts and methodologies and as there is no instance legitimate to fix a particular meaning of the quality of gender+ training. For this very reason, the content of OPERA activities has shifted from the definition of curriculum standards to the discussion of minimum quality criteria and ‘practices with potential’ to be tested in a variety of contexts and possibly mainstreamed. It appeared that these objectives would be better achieved if resulting from an interactive process of mutual learning as the one carried out through a CoP.

Simultaneously, building a CoP among gender training practitioners surely constitutes a challenge as gender+ training remains a highly contextual activity, of which the goals may vary according to the target group, but also the type of organization by which it is commissioned / organized, and the policy sector in which they are applied. More generally, the capacity of gender+

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<sup>4</sup> Wenger, E. (1998) 'Communities of Practice. Learning as a social system', *Systems Thinker*, <http://www.co-i-l.com/coil/knowledge-garden/cop/lss.shtml>. Accessed November 1st, 2009.

<sup>5</sup> Wenger, E. (2007) 'Communities of practice. A brief introduction'. *Communities of practice*, <http://www.ewenger.com/theory>, accessed November, 1st, 2009. See also: Lave, J. and E. Wenger (1991) *Situated Learning: Legitimate Peripheral Participation*, New York: Cambridge University Press.

training activities to provide knowledge on gender and other inequalities also depends on the context where it is carried out, paying attention to the broader institutional and policy context, including gender machineries, gender mainstreaming history, or available data and expertise on gender+. Despite the above-mentioned shared basic features, gender+ training practitioners also represent a rather vague and diverse category and are engaged in the processes of professionalization and marketization of gender+ training activities across Europe. This makes the tools and methodological approaches developed by trainers a matter of competitiveness, in the absence of certification / accreditation instances or commonly accepted quality criteria. This situation, which makes mutual learning and cumulative approaches more problematic, was nonetheless considered as an incentive for the making of a Community of Practice, as well as a challenge to ensure confidentiality and fairness among future participants.

Last but not least, a Community of Practice was here understood as a *supportive*, rather than an expert network, in that sense that it was designed to enable trainers/experts to keep interchanging ideas beyond face-to-face encounters as those carried out during expert meetings or academic seminars, to promote *effective changes* and to enhance communicational and tutorial skills of its members.

As an innovative means for strengthening gender+ training activities, the OPERA CoP was launched in the form of three monographic, one-day on-line forums supervised by OPERA team members on a social utility accessible upon individual registration from the QUING project webpage (<http://forum.quing.eu/>), in January-April, 2010. The Final conference, and the consecutive process of adoption of a joint declaration on gender+ training, were considered as the two next steps in a long term process, by which disconnected or isolated individuals are progressively encouraged to join a community of practitioners. A further step might be to strengthen communication between Communities of practices emerging in a common area (or market) as the European Union, in order to identify common interests, objectives (in terms of social change) and quality criteria that would make them and their memberships stronger when it is necessary to negotiate with commissioners what Gender+ training is about, and how it should be designed to be effective. The widespread of the Madrid declaration, and the transfer of the gender trainers database to the EIGE, are expected to play a role in this process.

### **1.3 The Madrid Declaration on Gender+ Training**

The *Madrid Declaration on Gender+ Training* is one of the primary outputs of the OPERA component of QUING, and also acts as a tool for the dissemination of the OPERA results and activities. The idea of the Declaration emerged during the planning stages of the OPERA conference, during which it was agreed that the conference should aim to produce some kind of mission statement on gender+ training as a first step forward in establishing minimum quality criteria, building a Community of Practitioners, and as a tool of accreditation for gender trainers. During these initial discussions, it was agreed that the Declaration should be positioned in order to work towards an agreement on minimum quality standards among gender+ trainers, driven by the key criteria established during the OPERA component. A preliminary draft of the Declaration was developed by the OPERA team in advance of the conference and then circulated during the conference for discussion in the parallel session related to each aspect of the Declaration. In the final plenary session a first round of comments and responses to the Declaration draft were collected from conference participants, in response to which a further draft was developed.

In terms of content, the Declaration is arranged into three key sections: the positioning of Gender+ training; the content and methods of Gender+ training; and the further development of high quality Gender+ training. After the conference, participants were invited to join in an online consultation process, offering comments and suggestions on the Declaration during a period of approximately six weeks. A Spanish version was also provided to enable Spanish-speaking participants to join in. The consultation process was in general well received. Out of all of those contacted, 29% approved the document outright, 2% rejected it and a further 3% had some

reservations. Out of the remaining 65% who did not send an official reply, 38% viewed the Declaration. This means that the consultation process reached a wide audience and the vast majority of conference participants (72%) engaged with the process in some way.

After the consultation process closed, the feedback on the Declaration was arranged anonymously and presented to the OPERA team. We then held a telephone conference to discuss each comment and agree on how to respond. The majority of the feedback was not substantive in the sense that they did not propose a change in focus or structure. Nevertheless, the comments were very useful in challenging the orientation and priorities of the Declaration. It is interesting to reflect on the comments received as they give an impression of which aspects of quality criteria are contested by gender+ training practitioners. A justification of all the responses was sent to each person who had provided feedback, in order to be accountable and transparent about the decisions made.

Below is a summary of the comments received and the ways in which each was dealt with (comments in italics):

- *Somewhere the term "gender +" should be explained.* We have added an additional sentence in the opening paragraph to explain the term.
- *"Gender+ training should work towards engaging both men and women" reinforces a gender binary and actively excludes the realities of trans and intersex people.* Have changed this to 'engaging men, women and people of any gender or sex'.
- *I think it useful to talk also of service delivery as well as policy making.* Have added 'and service provision' as we see this as slightly broader than service delivery.
- *The only thing I would add is that a gender + training should break up gender and other stereotypes.* We have added a further bullet point: 'Gender+ trainings should work towards challenging gender and other stereotypes'
- *Suggest including men's studies.* We have agreed that we understand 'gender theories' to be an umbrella terms which incorporates men's studies and masculinities.
- *I wouldn't mention feminism to civil servants - there's a shut down right away.* We only use feminism in relation to theory so will keep it in. We want this to be a feminist declaration.
- *Needs an extra line about gender training taking into account actual gender inequalities particular to the location, sector, policy and service delivery area with which trainees engage in the course of their day-to-day work.* We have added an extra bullet point about the importance of context.

Based on the outcomes of this meeting, a further version of the Declaration was produced and circulated to the OPERA team for final approval (see ... for full text of the final version). The final stage of the Declaration involves its life beyond the QUING project. Negotiations are underway with the European Institute for Gender Equality (EIGE) to secure a handover of the process of dissemination. A plan of action for the Declaration has been developed in order to ensure it is promoted and used in the most productive way, to the maximum benefit of the emerging Community of Practice in gender+ training.

The plan stipulates that the following actions should be carried out:

- Contact all members of the OPERA Gender Trainers Database informing them that the final draft of the Madrid Declaration on Gender+ Training is now available
- Create a process by which supportive individuals and institutions can sign up to the Declaration – for example by creating a webpage through which people can add their signatures
- Encourage those who have signed to add the Declaration to their website and to circulate it among colleagues and relevant mailing lists

- Search out relevant mailing lists across gender equality institutions, public administrations and academia and send out the Declaration along with the invitation to sign up
- Maintain an active list of those individuals and institutions who have signed up to the Declaration and use this as the basis for promoting the Declaration widely
- Actively search for new and innovative ways to promote the Declaration, such as interventions at relevant conferences and meetings

It is hoped that this Declaration will remain a highly visible and influential tool which contributes to creating a legacy for the QUING project: vibrant Communities of Practice in Gender+ Training working in agreement with basic quality criteria.

## Conclusions

In order to reflect broadly on the OPERA component, the Conclusions are structured into achievements, lessons learned and future prospects.

### *Achievements*

Beginning with the successes, it can be argued that these have been considerable. The key objective of OPERA was to operationalise the QUING results, and this has been achieved in two main ways. First, OPERA has been focused on promoting quality in gender equality policies, in line with the overall aim of QUING, and on establishing the need for quality in gender training as a fundamental component for gender mainstreaming strategies. Second, OPERA has worked to introduce and integrate intersectionality into gender trainings, developing and promoting the concept of gender+ training at the European level. A further achievement of the OPERA component has been the promotion of bringing together a critical mass on gender+ training in Europe. Before OPERA, it was clear that gender training was an under-explored area and any advances made in terms of quality were conducted as practical struggles by individual gender trainers and organizations. This critical mass of gender+ trainers promoted a reflection not only on practical questions but also on generating concepts and theories of gender training. Moreover, this was conducted under the idea of quality and curriculum standards, moving beyond a study of gender training Europe and engaging in a concrete manner with concrete standards. At the same time, this process was carried out in collaboration and consultation with gender trainers and practitioners.

Continuing with the achievements of OPERA, one of the most substantive has been the establishment and development of a Community of Practices in Gender+ Training experts. This has been consolidated through a number of key OPERA activities: the OPERA database; synergies with TARGET; the transfer from a training the trainers activity to an online forum format; the OPERA final conference; and the Madrid OPERA Declaration. In addition, one of the main strengths and innovations of OPERA has been its focus beyond academia, and the engagement of gender trainers and experts, commissioners and policy-makers. This is one of the key ways in which OPERA allowed the QUING project to move beyond an academic research project into policy-making and implementation arenas. In particular, engagement with gender training commissioners represented an original step as previous work on gender training had focused almost exclusively on the trainers themselves. This led to asking fundamental questions about how gender+ training is formulated in the policy-making process and, in turn, to one of the most important findings of the OPERA component: that gender+ training must be integrated into a gender mainstreaming strategy in order to be effective. Also, it reframes the planning of gender+ training away from being a purely technical issue and places it more broadly in policy-making debates and processes.

### *Lessons learned*

It is also useful to reflect the challenges that arose and lessons learned during the OPERA component. A first challenge that OPERA was faced with has been the tension between looking for 'quality standards' -as they were named at the beginning of the project- in an activity such as gender+ training which is highly contextual. The shifts in the OPERA language from 'standards' to 'minimum quality criteria' and from 'best practices' to 'practices with potential' reflect the lesson learnt through the debates of the expert meetings concerning the importance of adapting the search for quality with the wide variety of gender+ training contexts, approaches, concepts, and methodologies. Not only quality criteria need to take such context variety into account in order not to exclude gender+ training practices that have quality potential, but also the fixing of quality criteria needs to be considered, as all political processes, one that is open to actors' contestation and in constant process of transformation. Yet, this does not mean that minimum quality criteria cannot be 'fixed' for some time, in order to avoid everything being labeled gender+ training and to promote gender+ trainings that strive for quality. It

seemed then important in OPERA to support the recognition of quality gender+ trainings that for instance include in their content the structural character of gender inequalities or practices that enhance trainers' reflexivity. The principles included in the Madrid Declaration on Advancing Gender+ Training in Theory and Practice, supported by a variety of people, are in this sense an example of this ongoing attempt to reconcile quality criteria and context diversity.

A practical issue and overarching concern for OPERA is the extent to which it was possible to reach all the people carrying out and commissioning gender+ training in Europe. It was clear that language issues were a significant barrier to participation in many of the OPERA activities such as the online fora. In Italy, for example, there is anecdotal evidence of innovative and high quality practices in gender+ training. However, due to language issues such individuals and organizations were not significantly integrated into the OPERA activities. In order to combat this to some extent, particular effort was made to include Spanish participants in as many different ways as possible, by translating key documents and providing simultaneous translation at the Conference. In future activities it would be useful to reflect on this issue and consider solutions such as conducting online fora with simultaneous translation. A further related point is that it is difficult to assess to what extent the Europe-wide Community of Practices is being replicated at local levels. This could be explored further and a greater effort made to promote local networks and activities.

Another key challenge of the OPERA component has been working with such a broad range of actors – most notably, gender trainers and commissioners. Engaging with gender trainers throughout the process has revealed a number of tensions between academic and practitioners' working methods. For example, at times there has been a conflict between the needs and perspective of gender trainers and those of academics. While gender trainers have tended to push for more 'pragmatic' approaches and discussions, academics have often been requesting more debate and detailed discussion on the theoretical and conceptual aspects of gender training. This tension was particularly evident in the organization and evaluation of the conference. While the conference team (primarily academics) aimed to move away from a strict academic format in favour of a more participatory model, it seemed that this was only partially achieved. Feedback from the conference evaluation process revealed that for many gender trainers the conference was not participatory enough and 'too academic'. This tension is a useful finding in itself, and points to a need for further work to be done on creative ways of engagement and finding a middle ground between gender training practitioners and academics. In terms of commissioners, this challenge has been even more pronounced. While gender trainers in general have been open to reflection on their practices and methods, there remains considerable work to be done in encouraging commissioners to engage in such reflexive practices.

### *Prospects*

Finally, it remains to reflect on the future trajectory of the OPERA component, of which four main aspects can be highlighted. First, the success of the OPERA Conference can be considered a key output which is likely to have a lasting impact on the field of gender+ training in Europe and worldwide. This will be consolidated through the production of a short publication outlining the main themes and debates of the conference, which will be circulated widely among relevant mailing lists. Second, the Madrid Declaration on Gender+ Training is likely to become a Europe-wide reference point for quality standards in gender+ training. It is hoped that the open consultation process and dissemination among a wide range of institutions will lead to a multiplier effect and that individuals and institutions will 'sign up' to the Declaration, legitimizing its value as a tool for setting quality criteria. Third, a proposal for a book on gender+ training is currently being developed. This will allow for a more substantive reflection on the issues and challenges raised during the OPERA process and give an academic presence to the findings. Finally, the management of the Communities of Practice, OPERA Database and Madrid Declaration have been handed over to the European Institute on Gender Equality. This means that rather than be lost after the end of the QUING project, the

momentum can be built upon in order to continue developing these activities. EIGE have already taken a strong interest in gender training and are currently in the process of developing an expert group, with activities such as a second gender training conference planned for 2012. The handover of the OPERA activities and outputs to EIGE is likely to ensure a sustainable and positive legacy for the OPERA component, and for the QUING project overall.