

PLOTINA

**Promoting gender balance and inclusion in research,
innovation, and training**

TERMS OF REFERENCE

**PLOTINA external reviewer for the
monitoring and evaluation of GEPs' progress**

Grant Agreement no. 666008

Project acronym: PLOTINA

Open call for
“three external reviewers of the Gender Equality Plans' progress”

Date of publication of the call: **12-12-2017**

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This tender documentation is the underlying document for drawing up and submitting bids by tenderers for the above mentioned H2020 project PLOTINA (Grant Agreement no. 666008).

1. Contracting Organisations

1.1 Basic data and Person Authorised to Act on Behalf of the Contracting Organisation

- **Contracting organisation for external reviewers**

Name: Zentrum fuer Soziale Innovation (Centre for Social Innovation)

Address: Linke Wienzeile 246, 1150 Vienna, Austria

Person Authorised to Act on Behalf of the Contracting Authority: Maria Schwarz-Woelzl

- **1.2 Contact Person of the PLOTINA project**

Name: Prof. Tullia Gallina Toschi

Organisation: ALMA MATER STUDIORUM – UNIVERSITÀ DI BOLOGNA (UNIBO), Full Professor at the Department of Agricultural and Food Sciences (DISTAL)

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2. Preamble

PLOTINA is an ongoing CSA project that responded to the Horizon 2020 GERI-4-2014 call for proposals. It runs from February 2016 to January 2020.

The overall objective of PLOTINA is to enable the development, implementation and assessment of self-tailored Gender Equality Plans (GEPs) with innovative and sustainable strategies for the Research Performing Organizations (RPOs) involved. This objective will be achieved by: i) Stimulating a gender-aware culture change; ii) Promoting career-development of both female and male researchers to prevent the waste of talent, particularly for women; iii) Ensuring diversification of views and methodologies (in this case by taking into account the gender/sex dimension and analysis) in research and teaching.

PLOTINA is a partnership of RPOs, Professional Associations and Partners with specific expertise in monitoring the progress of the project and in the dissemination. The consortium represents the diversity of European RPOs as well as the diversity of European social and cultural environments.

The work plan proceeds in four stages:

- i. Assess the current situation in all Partner RPOs
- ii. Design GEPs for each RPO
- iii. Design, implement and evaluate Actions in the Partner RPOs to address the targets of the GEPs
- iv. Create a platform of resources that can be used by RPOs across Europe to implement their own GEPs suited to their own situations. The GEPs Actions will

support systemic and sustainable changes at the institutional and departmental of the PLOTINA's RPOs.

The end results will be a set of modular and adaptable resources for other RPOs at the starting stage in the setting up of GEPs, in particular: Tools, GEPs Library of Actions, research and teaching Case Studies and Good Practices.

Strongly aligned with a European Research Area (ERA) objective on gender equality, PLOTINA will contribute to increase the number of female researcher, promote their careers and integrate of the gender dimension into the design, evaluation and implementation of research, to enhance its quality and relevance foster excellence and the social value of innovations.

The progress made by the PLOTINA RPOs, in terms of governance of gender equality policies, strategies and processes, gender equality in recruitment, career progression and pay, work and personal life integration, and gender/sex variable insertion in research activities and teaching throughout the duration of the project will be assessed in two iterations. Therefore, a methodology is developed to evaluate the progress made by the RPO partners, in terms of design and implementation of the self-tailored Gender Equality Plans (GEPs).

The main tasks in the monitoring and evaluation WP are:

- Establishment of a catalogue of core indicators;
- Designing, programming and implementing a self-assessment monitoring software for the RPOs;
- Synthesis of the audit reports (D2.3);
- Interim evaluation report and collaborative formative event;
- Final evaluation report.

In order to guarantee impartiality in the monitoring and assessment process of the progress made by RPOs, three peer reviewers will be selected from countries different from those represented in the PLOTINA Consortium, on the basis of their recognized role in setting up Gender Equality Plans or their scientific expertise in gender equality.

Basing on the Grant Agreement of PLOTINA (GA no. 666008), the overall responsibility per peer reviewer is to produce:

- i) A formative interim report by compiling a checklist format for either two bigger RPOs or three smaller RPOs, assessing the progress made in the first phase of the GEPs implementation and providing suggestions for the second phase. The formative interim reports will be carried out before M32 (10/2018).
- ii) A summative final evaluation report by compiling a checklist format for the same two (resp. three) RPOs, describing the GEPs' progress achieved in the overall project run. The summative final evaluation reports will be carried out within M46 (11/2019).

The major activities and steps in the monitoring and evaluation of the GEPs' implementation progress are:

- i) From M31, August 2018, to M32, September 2018, peer reviewers, basing on the list of supporting documents provided by ZSI and described below, will assess individual RPO progress against the catalogue of core indicators and scores by producing a formative interim evaluation report to guide RPOs in revision of their GEPs and the Actions for the Library (before the end of September 2018). Supporting documents are: the synthesis of the Audit reports, as well as of the monitoring activities, as periodically conducted by the partners Elhuyar and Progetto Donna (qualitative data) and of the quantitative data collected through the monitoring data-management system (quantitative data) (M31). The reports' structure will follow the same structure as used in the synthesis report of the audit reports, according to the five pillars:
1. Gender balance in governance bodies, and decision-makers bodies;
 2. Gender equality in recruitment, retention and career progress;
 3. Gender equality in work and personal life integration;
 4. Gendered-balanced participation and progression in research careers and Integration of the gender/sex dimension in research contents;
 5. Integration of the gender/sex dimension in teaching curricula.
- ii) ZSI will compile the comparative report of the individual (interim and finale) reports and integrate the peer reviewers' reports to one single report (M33, October 2018).
- iii) The interim evaluation report will be presented by ZSI and discussed with RPOs at the meeting hosted by ISEG (M34, November 2018) to carry on a formative process with the aim of empowering them to achieve the suggested changes and provide feedbacks to enable self-assessment and improvements of GEPs.
- iv) ZSI will produce an analysis related to the second phase of GEPs implementation (M30-M44) focusing on outputs and outcomes, including the Action Library, Case Studies, associated documentation, analysis software, and effectiveness of the Audit procedure, that will be submitted to the peer reviewers by M45 (October 2019).
- v) Peer reviewers will produce a summative final evaluation report by compiling a second checklist format providing an overall assessment of GEPs implementation in each RPOs by M46 (November 2019). The focus of the final report will be on learning and transferability of gender equality and gender/sex inclusion in the RPOs and RFO's partners. It will be structured to assess the GEPs implementation, in terms of Actions and impacts, according to the five pillars reported in step (i).
- vi) On the basis of the peer reviewers evaluation, ZSI will produce a final evaluation report (M48). The final evaluation report produced by ZSI and the methodology for the impartially monitoring will be presented and discussed at the final PLOTINA conference (M48). The complete methodology for impartially monitoring will be also uploaded into the online PLOTINA database as a monitoring tool to be used by other European (M44-M48).

3. Mandate of external peer reviewers

Activity 1: Participation in a half day online workshop

Description of the activity: for a deeper understanding of PLOTINA's aims, objectives and methodology, and in order to get insight into the context of the PLOTINA's monitoring and

evaluation activities, a half day capacity building workshop with the peer reviewers will be conducted online. The workshop aims further, to fine-tune the workplan, to concretize the structure of the reports and the related checklist form and to establish a smooth communication flow.

Timing: The online workshop will be organized and facilitated by ZSI. The workshop will take place in the last two weeks of May 2018.

Activity 2: Formative interim report about RPOs' GEPs implementation progress

Description of the activity: This task provides the foundation for the success of the GEPs' implementation progress for the second phase. On the basis of: i) quantitative and qualitative analysis of the monitoring data of the first phase of RPOs' implementation of GEPs, and ii) assessment against the synthesis report of the audit reports (which builds the baseline of the monitoring and evaluation process), the three peer reviewers will produce per RPO a formative interim evaluation report by compiling a checklist form to guide RPOs in revision of their GEPs and the Actions for the Library.

Expected output and deadline for submission: two (resp. three) formative interim reports per peer reviewer, including recommendations for the second GEP implementation phase. The two (resp. three) formative interim reports have to be submitted to ZSI before the end of September 2018.

Activity 3: Summative final report about RPOs' GEPs overall implementation progress

Description of the activity: this task includes the summative analysis of the entire implementation process from T0 to T2. The methodology is similar to activity 2: On the basis of: i) quantitative and qualitative analysis of the monitoring data both of the two implementation phases (T0 to T2) and ii) assessment against the synthesis report of the audit reports, the three peer reviewers will produce per RPO a summative final evaluation report. The focus will be on outputs, learnings, transferability and up-scaling of gender equality and gender/sex inclusion in the RPOs partners. It will be structured to assess the GEPs implementation, in terms of actions and impacts.

Expected output and deadline for submission: two (resp. three) summative interim reports per peer reviewer, including lessons learned for transferability to other RPOs. The date of submitting the two final reports to ZSI is end of November 2019 (M46).

Summary of outputs and deadlines

Act Nu.	Activity description	Activity output/deliverable	Timeline for implementation/Deadlines
1	Participating in an half day capacity-building online workshop	Participation	April 2018
2	Two (resp. three) formative interim reports, including recommendations for the second GEPs' implementation phase	Two (resp. three) reports, 1. Assessing individual RPO progress against the catalogue of core indicators and scores in order to guide RPOs in revision of their GEPs and the Actions for the Library. 2. Giving recommendations for the second GEPs' implementation phase.	30 September, 2018
3	Two (resp. three) summative final reports about RPOs' GEPs overall implementation progress, from T0 to T2	Two (resp. three) reports, 1. Assessing the overall GEPs implementation, in terms of actions and impacts. The focus will be on outputs, learnings, transferability and up-scaling of gender equality and gender/sex inclusion in the RPOs partners	30 November, 2019

4. Duration and Timeframe

Start of the public contract implementation is expected on 1 April 2018. The date for the start of the public contract implementation is conditional upon the end of award procedure and signing the public contract with the selected tenderer.

The contract will last until November 30, 2019, however it is subject to the achievement of the activities and outputs described above.

5. Estimated Value of the Public Contract

The estimated maximum value of the public contract is EUR 1.667 net of VAT. The contract will not be open for amendment of services or budget.

6. Requirements for Meeting Qualifications Criteria

Subcontractors should be based in one of the following countries: Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Romania, Slovakia, and Sweden.

Tenderers can be physical persons.

Providing Curriculum Vitae documenting:

- proven expertise in the field of gender equality issues – finished or ongoing projects and service contracts;
- fluent written and spoken English.

The following weights apply for the required qualifications:

Expertise in the field of gender equality issues, especially in the field of gender equality plans	Max score: 14
Fluent English	Max score: 6
Total max score: 20	

Candidates which do not meet the minimum threshold of 10 scores will not be considered eligible.

7. Deadline for Submission and Contents of the Applications

7.1 Submission of an Application

The deadline for submitting applications is **20 February 2018, 17 hrs Central European Time.**

The applications shall be submitted in writing as a pdf-document via email to the contracting authority representative Maria Schwarz-Woelzl schwarz@zsi.at

*Please include in the subject of the e-mail the following: **666008 PLOTINA peer reviewer application***

7.2 Content of an application

Each application should contain a Detailed CV(s). Key information should include number of years of experience and degree of responsibility held in various relevant projects.

8. Evaluation Committee

The applications will be evaluated by a Committee composed by ZSI, Elhuyar and Progetto Donna, where the latter ones are the gender consulting expert partners in the PLOTINA project. Each of the three partner organizations will separately evaluate the applications and score them along the scheme as described in section 6. In case more than three applicants receive the highest score, the project coordinator (i.e. UNIBO) will be asked for a recommendation. The tender results should be announced not later than the 20th of March.

9. Payment Conditions

It is foreseen that there will be two payments, linked to delivery of outputs as follows:

1. November 2018 (M34);
2. upon fulfilment of the contract (January 2020, M48).

10. Other Conditions

The contractors reserve the right to amend or modify conditions laid down in the tender documentation. The contractors shall be obliged to inform all invited tenderers about any amendment to the tender documentation.

Requests for additional information (in writing or via e-mail) can be made on the following address:

Contact: schwarz@zsi.at