Monitoring Handbook

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SEVENTH FRAMEWORK PROGRAMME

GenderTime

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Foreword

The GenderTime project

GenderTime was a project funded by the European Commission between January 2013 and December 2016. The purpose of the project was to promote structural change and increase the participation and career advancement of women researchers in seven research and education institutions in seven European countries.

The method for change that was adopted in the project utilized **Gender Equality Action Plans (GEAPs)**, which were tailor-made to fit each of the seven institutions. The seven GEAPs organized almost 200 actions and change interventions that were implemented during four years. The actions targeted organizational and managerial processes and procedures and aimed at e.g. creating gender sensitive recruitment, retention and promotion policies; supporting and improving work-life balance; establishing a more inclusive work culture, and; increasing gender awareness throughout the organizations.

The implementation of the GEAPs in the participating institutions was carefully monitored throughout the project. The name of the project, GenderTime, indicates the prominent place **monitoring** had as the acronym **TIME** stands for: **T**ransferring, **I**mplementing, **M**onitoring **E**quality.

This **Monitoring Handbook** outlines the guidelines and recommendations concerning monitoring which were developed and applied during 4 years in the GenderTime project. It also includes detailed information about the specific monitoring tools that were designed and implemented within the GenderTime project.

We believe that the handbook, by providing this type of practical information, can fill a gap in the literature about change management and action research.

We hope that the handbook can be useful to others involved in gender equality change projects. Many of the practical guidelines and recommendations are of a general character, not linked to gender equality. The handbook can therefore hopefully also be relevant for those involved in change projects more generally, not exclusively targeting gender equality.

The GenderTime Consortium in June 2013

Introduction

What is monitoring?

Monitoring refers to the on-going collection of data in order to assess whether a change project is going in the right direction and complies with the pace and stages set in the project plan. The purpose of adopting such an internal monitoring system in a change project is to gain a comprehensive understanding of the interventions, to learn from successes and challenges, and to facilitate **incremental corrections and improvements**.

Although the benefits of monitoring seem obvious, it is often not given a prominent place in change projects and sometimes it is overlooked completely. That monitoring is a neglected field is for example illustrated by the limited literature on monitoring. This is especially noticeable in relation to the much more extensive body of literature dealing with **evaluation**.

Defining monitoring and evaluation in relation to each other can prove challenging, particularly considering there are several different types of both monitoring and evaluation, some of which are overlapping (Equality Challenge Unit 2014).

One way to distinguish between monitoring and evaluation is to focus monitoring on what is happening in a project without necessarily explaining *why* it happens, which is instead left to the evaluation process to answer (Funnell and Rogers 2011).

Monitoring differs from evaluation regarding for example **timing**. While evaluation can take place after the project started and even after it ended, monitoring is usually initiated already in the planning phase.

Evaluation often uses a quantitative approach with clearly defined performance **indicators** to measure expected outcomes (Badaloni and Perini 2016). Monitoring, on the other hand, can use a **qualitative** and more **inductive approach**, which builds on continuous observations of the activities in the change project.

In the GenderTime project monitoring and evaluation were distinct project activities designed to complement each other. An **external team**, not involved in the implementation of GEAPs, performed the evaluation. In contrast, an **internal team** coordinated the monitoring activities in GenderTime and all implementing partners actively participated in these activities.

Two types of evaluation were used in the GenderTime project:
Impact evaluation focused efficiency and sustainability in the outcomes and results in comparison to the stated objectives and goals, and external accountability.
Progress evaluation focused the internal process of learning in the project, internal accountability, cooperation and collaboration between the project members (Siebenhandl and Mayr 2015).

Monitoring, as used in the GenderTime project, can be referred to as a type of **performance monitoring**. Exactly what this implies will be further explained in this handbook.

Defining monitoring and evaluation

- Monitoring and evaluation are distinct and complementing but sometimes overlapping project activities.
- Both monitoring and evaluation contributes with important information about project processes, progress and impact.
- Monitoring and evaluation can differ regarding for example timing, approach, involvement of participants and whether it is external or internal.

Why should we monitor?

If used strategically and systematically the many benefits of monitoring can be essential for the success of a change project.

One of these benefits is that monitoring contributes to systematizing **change interventions and the implementation process**. Implementation processes in change projects are often complex and multilayered and can at times also be confusing for those involved. Monitoring is useful as it can produce detailed and structured information about what is happening in the change project and how the interventions are going. It **tracks progress** and reports on achievements at different times in the project. This information, if fed back to the practitioners involved in the change process, can contribute to their **increased motivation**.

Collecting monitoring information data, while comparing it to the baseline and to the expected outcomes, makes it possible to identify where there is room for improvements. Monitoring identifies whether or not the desired results are achieved and can be used to develop **corrective actions** to optimize future achievements. This systematic knowledge can be further used to re-adjust objectives and goals and keep them realistic (cf. Kotter 1995).

Monitoring can, in addition, systematize **individual** and **shared reflection.** It can thus be used to provide a framework to facilitate knowledge sharing between participants and stakeholders in a project. These reflections can be used to improve the interventions and the implementation of the change plans, but also to develop plans for how interventions can be adapted to other circumstances and transferred to other settings.

Finally, monitoring can contribute to systematizing the **evaluation process** as it can identify the need for evaluation and let new important indicators and measures emerge inductively (Funnell and Rogers 2011).

What and *who* should we monitor?

When planning the monitoring activities in more detail important decisions have to be made regarding exactly which data that are valuable and relevant to collect, i.e. which data that can be considered as **reliable measures** of achievements, performance and progress.

It is advisable to gather a **variety of data**, using sophisticated monitoring tools of both quantitative and qualitative character: questionnaires, interview guidelines, checklists, templates and workshop concepts. This will increase the likelihood that the information about the achievements and progress is as reliable as possible. This includes making informed decisions about *whom* to monitor based on considerations of which actors possess important information regarding the interventions and the implementation.

In the GenderTime project both **qualitative** and **quantitative monitoring data** was collected. Qualitative data, however, was given precedence as it was decided it could provide better evidence of improved gender integration and gender equality.

A special focus in GenderTime was also dedicated to using monitoring in order to systematizing knowledge about **challenges** and **success factors** that either facilitate change or prevent change.

	Use monitoring to:
	- Systematize and improve the implementation process. - Systematize and facilitate individual and shared reflections. - Systematize and improve the evaluation process. - Systematize and analyze knowledge about challenges and success factors.

When should we monitor?

Monitoring needs to be performed on **regular basis** in a project. Sometimes it is even described to be an activity that should be executed in a routine-wise manner.

The character of monitoring should be adapted to the specific phase of the implementation process and whether the project is in the **launching phase** with early implementation interventions, in the main **implementation phase** or in the final **reflection phase** where the interventions are being completed. Monitoring plays different roles in the different phases.

Monitoring should begin already at the very start of the change project. The role of monitoring during this launching phase is to gather information and data to establish relevant **baselines** that can be used for time-related comparisons of before and after the implementation started. This launching phase can benefit from quantitative monitoring tools. The reflection phase, in comparison, requires qualitative monitoring tools.

The **intensity** of the monitoring activities should also be adapted to the specific phase. The implementation phase, for example, might call for a concentration of more monitoring tools than the other phases.

It should also be noted that monitoring takes time away from the implementation. To find a balance is therefore important, between monitoring regularly and allowing enough time for the project stakeholders and partners to use the tools.

How should we monitor?

In order to develop the best possible monitoring system a **structured approach** is recommended. This means making strategic and well-informed decisions during each phase of the monitoring process – most urgently about *what*, *who* and *when* to monitor.

These decisions can be facilitated by a combined inductive and deductive approach.

Using a **deductive** approach means making the decisions based on research literature. Research-based theories about organizational change can provide information important to understand change processes, problems and effective practices, and thus maximize the relevance and applicability of the monitoring activities.

This is information that also can be obtained from interviews with experienced evaluators or other experts, practitioners and change agents within the relevant field in question.

With an **inductive** approach the decisions about what, who and when to monitor are based on information gained from observations in the monitored project. This will allow for tailor making the tools to fit the needs of the specific project at hand.

The combination of a deductive approach with an inductive approach constitutes a sound and solid basis for the development of the monitoring tools.

The monitoring process

Step 1: Establish a baseline.
Step 2: Make well-informed decisions about when, what and who to monitor.
Step 3: Collect information about the achievements in the project.
Step 4: Compare the information with the project plan and objectives.
Step 5: Assess the progress and achievements.
Step 6: Discuss proposals for corrective actions.
Step 7: Use the results to develop future monitoring tools.

Monitoring in the GenderTime project

Overview of the monitoring program

Over the 4 years of project implementation in GenderTime totally 10 monitoring tools were developed and applied. This handbook provides a detailed description of each individual tool. First, however, an overview will be provided to highlight how these 10 monitoring tools formed a strategic and systematic monitoring program that was an integrated part of the GenderTime project.

Monitoring in the GenderTime project started with the realization that it would be an impossible task to develop monitoring tools for each of the almost 200 actions and interventions in the seven GEAPs (Barnard et al 2013). Instead the main task of monitoring became to support the national teams with reflection tools for identifying facilitators and barriers for structural change within their organizations and thus monitor the implementation processes from an **individual** and **organizational perspective**.

Monitoring approach

The figure below illustrates that the monitoring tools were fairly balanced along the **quantitative/qualitative spectrum** although there was a slight predominance of qualitative tools. The decision to give precedence to qualitative monitoring tools was based on concerns about avoiding a simplistic view of gender equality as only dealing with numbers. Drawing on previous studies, feminist theories and expert interviews gender equality was operationalized in qualitative terms as involving culture, structures and attitudes and therefore difficult to quantify. However, quantitative measures and indicators are an important complement to qualitative tools and some of the monitoring tools therefore also offered the opportunity to combine a qualitative approach with a quantitative approach.

Figure 1: Monitoring approaches and tools

Distribution of monitoring tools during project phases

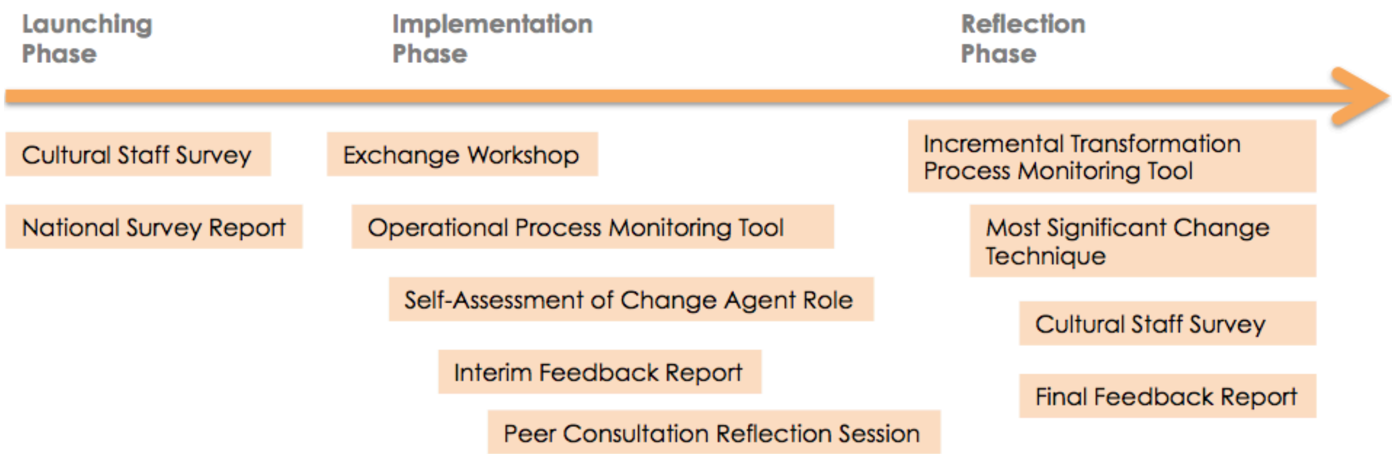
The figure below illustrates another important characteristic of the monitoring program in the GenderTime project – the timing of the different monitoring tools and how they were distributed during the different phases of the project.

Monitoring activities played an important role when establishing **baselines** in the launching phase of the project, i.e. month 1 to 6. This was achieved by collecting data about the status quo in each of the seven institutions where the GEAPs were implemented.

Two to three monitoring tools were used each year during the 4-year project with the exception of year 3 in the project when 4 different monitoring tools were implemented. The reason for this was that during year 3 all interventions were in progress, had been initiated or had already been terminated, which called for an intensification of the monitoring activities.

Decisions regarding the distribution of the tools over the 4 years also took into account that not too many monitoring tools could be implemented during each phase. Each monitoring tool required the involvement of the implementing GenderTime members and their workload was already high. The wish to create a **balanced monitoring program** also entailed a distribution of different types of tools during the different phases – hence for example alternating quantitative and qualitative tools.

Figure 2: Timing of the different monitoring tools



Cultural Staff Survey

Aim of the tool

The **Cultural Staff Survey** was the first monitoring tool developed and applied in the project. The aim of this monitoring tool was to provide the national teams with a quantitative indicator they could use to measure the level of gender equality at the participating institutions at the start of the project – to establish a baseline.

Background of the tool

The Cultural Staff Survey was based on a Culture Analysis Tool[1] developed by UKRC-WISE, as part of the HEFCE funded national HE STEM programme with the aim of sharing good practice in gender equality in higher education. The aim of this questionnaire is to help university departments understand how male and female staff experience their working environment and what, if any, improvements may be needed to ensure equality of opportunity. Content wise it focuses on four areas:

1. Participation and promotion practices
2. Workplace culture
3. Leadership and management commitment
4. Institutional reputation and social responsibility

Structure of the tool

The development of this monitoring tool began right at the beginning of the project. Six months into the project the national teams were involved in tailor making the survey to fit their specific national and cultural context but also to fit the intended target groups of the survey (e.g only faculty members or including also administrative staff). The survey was specified in this way, as the questions were adapted to meet the specific context of each institution also with regard to already existing gender equality activities of the organization or the GEAPs. This inclusion of specific institutional questions allowed for a broader efficiency assessment of the implemented GEAPs.

After translation into national languages the seven different versions of the survey were set up on the project webpage as an online version, which allowed a better dissemination of the questionnaire within the institutions/organizations (Barnard et al. 2014).

The figure on the next page shows a screenshot of the first page of the staff survey implemented at Loughborough University.

It illustrates for example that answering categories of the closed questions were organized along a 5-point-Likert-Scale plus the category 'Not applicable/I don't know'.

The questionnaire further contained sections for remarks were participants were free to add information if necessary.

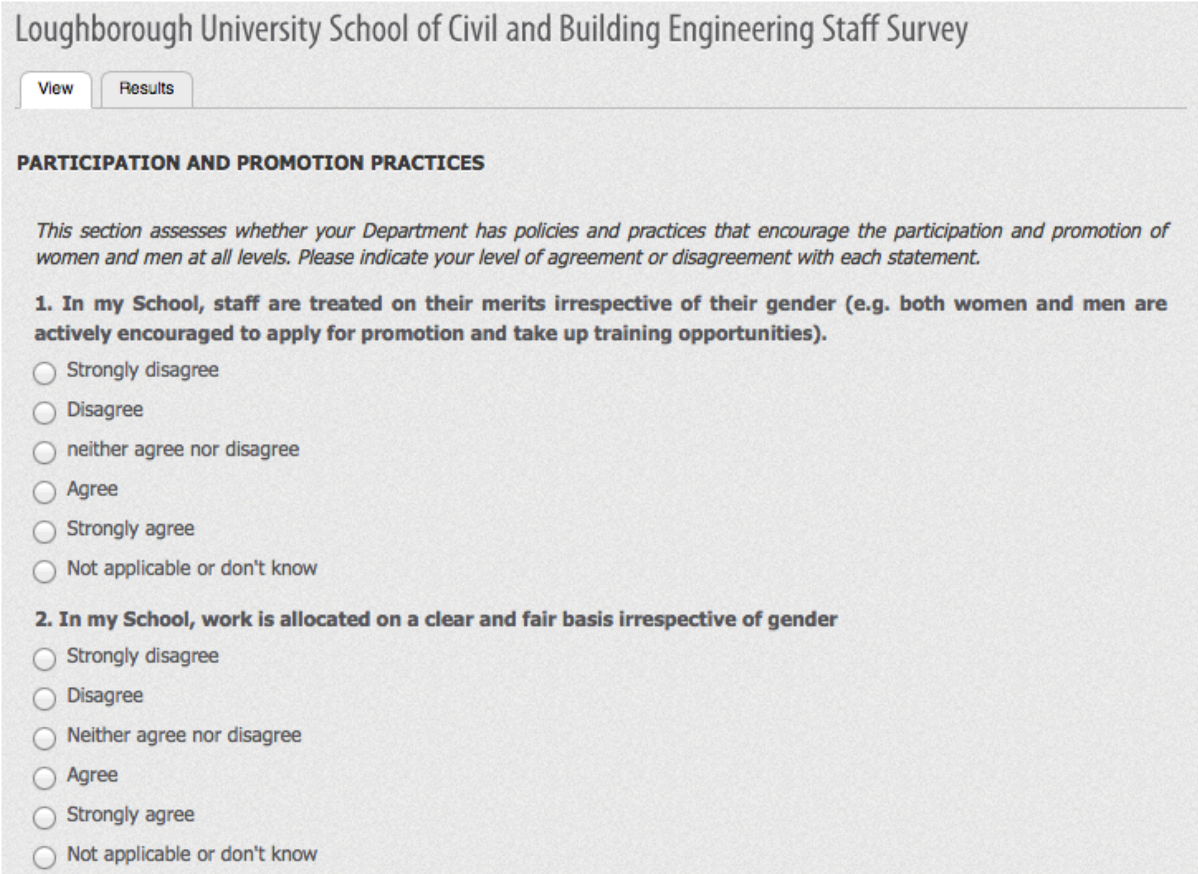
Results of the tool

Data Collection

Project partners were responsible for organizing the data collection at their own institution. The strategies used for promoting the participation at the survey were similar: emails to all targeted employees, announcements in internal newsletters, or e.g. via the company internal platform. Partly the commitment from senior management was used to motivate staff members to participate and also some kind of 'survey ambassadors', who informed colleagues about the aim and importance of the study. Some partners reported that they had 'neutralized' the survey announcement due to strategic reasons. Deleting words like 'gender equality' should help to activate also male staff members to participate and support their inclusion.

[1] See: https://www.wisecampaign.org.uk/resources/2010/06/staff-culture-analysis-survey for more information.

Figure 3: Screenshot of the first survey page at Loughborough University



Data Analysis

A special web application was developed, which allowed all partners to retrieve the absolute gender-segregated data of their institutional survey plus the overall cross-national data. The latter one also was made available as women and men only comparison between the countries.

Preliminary results were presented and briefly discussed by each national team during a project meeting. For a better understanding of the results more information of the national context was necessary, which led to the development of a national report template (see description of the next tool).

Summary

The implementation and analysis of this survey **symbolized a benchmarking** for the partners about the work culture in their institutions. It is a very good tool for getting information on staff member's perceptions of working conditions, management structures, communication flows and organisational environment not only with respect to gender equality matters. For achieving gender equal workplace conditions it is important to focus on the prevalent organisational structure itself (Castaño et al 2010). The results show that the implementation of gender equality measures or gender equality action plans can be even more difficult if actors in an organisation are not well informed about the legal, national and organisational context (Achterberg and Dahmen 2017).

A tool like this Cultural Staff Survey offers the possibility for an on-going reflection of the implementation process on a structural and individual level, which is important since organisational culture is not a static concept, it is fluent, and therefore it is necessary to explore the beliefs and behaviours within institutions (Peterson 2010). Therefore it can be recommended to implement a staff survey like this periodically or at the beginning and the end of an intervention for comparing the effects and results.

National Survey Report

Aim of the tool

The aim of the **National Survey Report** was to support and facilitate a cross-national analysis of the results of the *Cultural Staff Survey*. All partners were asked to give **more context information** on some selected survey questions, which are difficult to interpret for external persons without having organizational background knowledge. Additionally also general information about the implementation background of the survey at their institution, e.g. if they had received any feedback from staff members etc. should be provided.

Background of the tool

Partners were instructed to write as much as they wanted as a reply to each question. The space where they were supposed to insert text as a reply could easily be expanded. There was no word limit. Instead, they were encouraged to give as much detail and context as possible.

Interesting participant survey responses in open answer categories or remarks sections for single questions were supposed to be translated into English and included in the report by using a survey ID, so that it would be possible to cite them.

Structure of the tool

Like in the previous monitoring tools the layout and structure of the tool was kept similar to the already implemented ones, with the aim to evoke recognition value for the project partners.

The tool was structured as a Word-template with specified questions clearly indicating the information requested (see image right for an example of the first page). Project partners were invited to add background data in the remarks section in each box - for instance general remarks about national context or information about institutional context. Additionally partners were asked to add their own interpretations of the data.

Results of the tool

The reporting was based on gender-segregated data. Initially the idea was to use a more inclusive approach by adding the option 'other' to the otherwise binary gender categories 'male'/ 'female' and 'man'/'woman'. 'Other' would allow for people not being forced to identify with one of the traditional categories. However, since not all project partners transferred this idea to their national survey versions, this was excluded from further analysis.

The tool provided the possibility to compare the survey outcomes cross-nationally taking in consideration the interpretation of each team on their respective results. By doing so cross-national similarities and differences of the totally 1053 respondents where revealed, with partly surprising findings. For instance was male staff in Austria and Germany more likely to agree that it is clear for them what their department/faculty policies look like in relation to gender equality compared to their British and Spanish counterparts. And generally both men and women of the total sample agreed with around 50% that they understand why the institution/faculty needs to take up actions on gender equality. **Results** like these **offered indications** for the further implementation as well as monitoring process.

Figure 4: First page of the National Survey Report template

General information		
Please insert the short name of your institution here:		
How did you spread the information within your organization about the survey?	*Please insert text here*	
Please specify the target population of the staff survey in your country:	☐ All staff members (academic and non-academic) ☐ Other, please specify:	☐ Academic staff members ☐ Non-academic staff members
	☐ Whole university / institute ☐ Single faculty/faculties (please specify): *Please insert text here*	
Total sample number:	*Please insert text here*	
Response rate in %	*Please insert text here*	
Did you receive any feedback (positive/negative) or remarks from the participants concerning the survey?	*Please insert text here*	

Exchange Workshop

Aim of the tool

The aim of the **Exchange Workshop Monitoring Tool** was to allow all project partners to work together on the implementation of the GEAPs.

This was achieved through facilitating a collective reflection and an exchange of experiences between the participating GenderTime partners focusing on a discussion of successes and challenges.

Background of the tool

Like a majority of the monitoring tools, the Exchange Workshop was based on research about organizational change and feminist theories about challenges and resistance related to gender equality interventions.

This deductive framework highlighted the need to really understand the problems that change processes can encounter, but also the importance to learn from effective practices. Recommendations concerning this also emerged in the interviews performed with experienced evaluators and other experts.

Structure of the tool

The Exchange Workshop Monitoring Tool was structured as an internal workshop concept implemented during a project meeting. This workshop was part of the in-process consultation model of the implementation of the GEAPs (cf. Arrizabalaga et al. 2014).

Prior to the workshop participants had prepared a list of 3 challenges and 3 successes related to the process of implementing GEAPs at their organizations. These lists were the entry points for the discussions at the tables during the workshop.

The first part of the workshop was run in World Café format. World Café methodology is a simple, effective, and flexible format for hosting large group dialogue, so the partners had the chance to share their experiences of implementing GEAPs at their organizations.

In the **second part** of the workshop the partners were paired to work on a practical 6-month plan of how they could support each other. The list of challenges and success experiences filled previously together with the findings shared during the World Café constituted the input for this part. The 6-month plan consisted of a prioritized list of challenges to be addressed by a partner and suggestions for support from the partner.

Results of the tool

The results showed that persons involved in change processes **tend to focus on "challenges"** rather than on "success" factors. This is especially crucial since later monitoring tools showed the **importance of acknowledging** also **short-term wins** as well as **supporting factors** right from the beginning of the implementation process. It is not only essential for keeping up the enthusiasm and positivity of the change agents but also for communicating success into the organization. The challenges identified by this tool were related to "communication" (how to explain understanding of project), "precarity" (recruitment, promotion mechanism), "balance" (work life balance, gender balance), "data" (lack of disaggregated data), "environment" (skepticism, competitive culture) and "institutionalize" (decision-making issues, commitment of management).

Operational Process Monitoring Tool

Aim of the tool

The aim of the **Operational Process Monitoring Tool** was to provide a detailed overview of the progress towards the objectives in the implementation of GEAPs, during the early implementation phase. The purpose of the tool was to identify important **success factors** and **hindering factors**, related to the specific objectives in each institution.

Background of the tool

This monitoring tool, with the focus on success factors and hindering factors, was developed primarily using a deductive approach, drawing on previous action research on feminist interventionist change projects.

Obviously, due to the purpose of the interventions in the change project, feminist theories became important for the deductive approached used for developing the monitoring program in the GenderTime project.

Awareness of organizational power structures is necessary in projects aiming to change organizations. Gender equality projects can undermine power structures and reduce management control, which most probably will appear as undesirable by **powerful organizational actors**. It is for example important to identify the positions in which actors have the power to achieve the changes that are sought in the project, often line positions rather than staff positions (Coleman and Ripping 2000).

Based on this previous research the tool therefore for example included a question about **collaborations** within the participating institutions, with the aim to identify actors and internal partners important to negotiate with and win the trust from in order to succeed with the implementation of GEAPs.

Structure of the tool

This tool was designed as a template to collect information from all the implementing teams. Compared to several other reflection monitoring tools, filling out this template was intended to be an **internal team effort**, completed by each GenderTime national team. The Operational Process Monitoring Tool thus provided the national GenderTime teams time to discuss and reflect together on different experiences, perceptions and opinions regarding the implementation process.

The templates requested information about the implementation process that was structured around the objectives stated in the GEAPs, rather than the specific actions in each institution. The tables in the templates were therefore linked to every objective of the GEAPs. The tool was **tailor-made** for each team in this fashion as it was based on the objectives used in each GEAP. This also meant that the tool provided limited information about the specific actions, although the templates also made it possible to include information about specific actions - in progress or completed. The teams could decide to write generally about the objective or specifically about only one or two actions. The responses show that both ways of reporting were used.

Special attention was also paid to gathering information about whether some actions in the GEAPs had been **cancelled**, and why that was so. This was viewed as important information to be provided in relation to hindering factors and barriers.

The project teams were encouraged to write as much as possible and share as many experiences and as much detail as possible – without word limit in the document. The templates were distributed via email in month 22 of the project.

The figure below illustrates the design of the template for this monitoring. It displays one of the pages in the template document where the teams were supposed to fill out monitoring information about objective 1.

Figure 5: Example page of the Operational Process Monitoring Tool template

Objective 1			
1) Please specify your institutional objective(s):	☐ Improve employment opportunities for all at institutional level ☐ Review and monitor recruitment processes ☐ Diagnosis on the current situation regarding gender	☐ Review and monitor salaries ☐ Create gender balanced decision bodies ☐ Work-life-balance ☐ Not applicable for my institution	
2) Please identify the main actors for the implementation	☐ GenderTime members ☐ Transfer Agents	☐ Other, please specify:	
3) How important is this objective for your institution compared to the other objectives?	☐ Very high ☐ High	☐ Medium ☐ Low	☐ Very low ☐ Can't decide
4) Please describe the institutional relevance of this objective (e.g. aims, hopes, background, reasoning, outcome) with regard to achieving structural change:			
Insert text here			
5) Please describe, which factors support you in achieving this objective (e.g. managerial, individual, institutional etc.):			
Insert text here			
6) Please describe, which factors hinder you in achieving this objective (e.g. managerial, individual, institutional etc.):			
Insert text here			
6 a) If you already have met barriers in achieving this objective, how have you handled these? What were the consequences (e.g. change of measure(s), aims, persons involved etc.)? Please describe this process:			
Insert text here			
6 b) If you already have met barriers in achieving this objective but did not overcome these yet, what could help you? Please describe below:			
Insert text here			
7) How would you assess the success in achieving this objective until now?	☐ 1 - excellent ☐ 2 - good	☐ 3 - average ☐ 4 - satisfactory	☐ 5 - poor ☐ Can't decide
8) Any further remarks you want to add related to this objective?	☐ Yes If yes, please specify: *Insert text here*	☐ No	
9) Please insert names of team members involved in finalizing this template here:			

Results of the tool

The seven GenderTime partners reported on a wide range of **success factors** that they identified had supported the pursuit of the objectives and the implementation of the specific actions, for example good collaborations inside the institutions and management commitment. Similarly, they reported on a wide range of **hindering factors**, for example existing informal arrangements and lack of gender awareness.

This tool also provided examples of how challenges in the implementation process, related to lack of time, staff and funding, had been **overcome** by using different strategies. It also showed how some actions in the GEAPs had to be abandoned, due to challenges, and instead replaced with other ones.

The results from the tool proved to be highly relevant as it allowed for a deeper understanding of the progress related to each objective – which was important at this early stage of the implementation process. When developing the subsequent monitoring tools, however, the focus was again on specific interventions in order to retrieve more detailed information on the activities in each institution.

Self-Assessment of Change Agent Role

Aim of the tool

The aim of the **Self-Assessment of Change Agent Role Monitoring Tool** was to document information that could contribute to an increased understanding of which factors that motivate academics and practitioners to engage in activities aimed at transforming research institutions into gender equal organizations. It did so by asking: what are the most effective and efficient drivers for change?

Background of the tool

The deductive background of the Self-Assessment of Change Agent Role Monitoring Tool was the considerations expressed in the **expert interviews** that were performed within the GenderTime project. These gender equality experts emphasized the importance of also monitoring the people who actively implement GEAPs.

A second deductive starting point when developing the tool was the evaluation literature that focuses the importance of allowing for **reflection** during the implementation phase (Coleman and Ripping 2000).

A third starting point was taken in previous literature on **change agency**. Change Agents play an important role when it comes to changing organizations towards increased gender equality (Parsons and Priola 2013).

This tool also drew on feminist organization theories that provide a critical perspective on how organizational processes, practices and structures are gendered. Gendered organizational structures and practices are notoriously rigid and resistant to change (Linstead et al. 2005). Change agents for gender equality thus often face **resistance**. Feminist theories provided us with a framework for understanding the role of active and passive resistance to gender equality and to feminist activism. This monitoring tool collected information about different kinds of resistance and how such resistance can be overcome.

Structure of the tool

The Self-Assessment of Change Agent Role was a monitoring tool with a qualitative character and involved **self-reflection** by every GenderTime project member. The members of the consortium, who were active in the implementation of the GEAPs were asked to describe their personal experiences as Change Agents for gender equality. The tool was implemented during month 24 of the project, i.e. exactly at "half-time" of the project which is a critical phase when it is necessary to identify obstacles and provide support for corrections.

The tool thus provided a **personal** and **individual perspective** on success factors and challenges, especially resistance. This perspective was adopted with the intent to complement the institutional and organizational perspective that was used in the Operational Process Monitoring Tool to collect information.

The tool collected memories of situations in which the Change Agents had experienced negative and positive reactions to their attempts to improve gender equality in an institutional context. It was a tool that identified patterns of privilege and disadvantage and thus recognized the existence of a gender order, meaning that the notions and actions of individuals both produced and were the result of gendered power relations.

The tool was constructed as part of the framework of different, but coherently designed, templates developed within the monitoring program. The template consisted of six questions, considered to be the most relevant for the purpose of the tool – to collect data about the experiences of change agents for gender equality. Each team member was encouraged to write down as many reflections as possible. The six questions are shown below.

Figure 6: Questions of the Self-Assessment of Change Role tool

1) Please describe factors that have strengthened and/or supported your role as a Change Agent for gender equality. It can be individual (position, knowledge, networks etc.) or structural (management commitment, policies etc.) factors.

2) Please share some factors that have hindered and/or challenged you in our role as a Change Agent for gender equality. It can be individual (position, knowledge, networks etc.) or structural (management commitment, policies etc.) factors.

3) What motivates you as Change Agent for gender equality? Please share your personal motivation.

4) What can we learn from other Change Agents in our institutions/other institutions? What makes them efficient and successful? It can be individual (position, knowledge, networks etc.) or structural (management commitment, policies etc.) factors.

5) What could strengthen you in your roles as Change Agents in your institutions? It can be individual (position, knowledge, networks etc.) or structural (management commitment, policies etc.) factors.

6) Recommendations for efficient Change Agency: What do efficient Change Agents need and/or do? It can be individual (position, knowledge, networks etc.) or structural (management commitment, policies etc.) factors.

Results of the tool

12 change agents filled out this questionnaire template and submitted their personal reflections. These change agents described a wide range of supportive factors that strengthened them in their role as change agents as well as challenges that hindered them. These are personal stories about possessing or lacking different types of resources that are important for a change agent to be efficient.

All change agents referred to their role within the organization as an essential resource for the outcomes of the implementation process. Different variations of a **formal role** or an **informal role** were described as important resources to use. Being a change agent can often be an informal role within an organization and that role can be strengthened by for example a formal role such as being a professor. Having a formal role within the human resource department was also described as an advantage as it provides a platform to build a network within the organization. A position such as that can also open doors and lead to increased access to information.

The importance of resources such as time, money and the legitimacy of the gender change project were also mentioned. The results show that the lack of similar factors can become hindering and challenging. Most problematic was lack of support and resources and having a **precarious position** in the organization.

This tool contributed with important information about the **motivation** of the change agents (sense of fairness, awareness of problems, personal experiences of discrimination etc.) and about requests for supporting factors (more extended networks, less precarious positions, increased resources etc.).

Finally, the change agents also submitted useful and important **recommendations** for efficient change agency, based on their own experiences: search for allies; build a team; know the organization; be persistent; rely on facts; piggyback on existing initiatives etc.

Interim Feedback Report

Aim of the tool

The aim of the **Interim Feedback Report** was to let the national project teams report back on success factors and challenges, linked to each specific intervention activity in the GEAPs.

The aim of the tool was to gather provisional information that could be used to further deepen the monitoring of certain actions. The information collected constituted an important base for the decision which of the actions would be interesting and relevant to proceed with and monitor further with subsequent monitoring tools.

Background of the tool

The tool was designed with an inductive approach to collect data that was considered to be useful and valuable for the monitoring process.

A similar tool had been used in the beginning of the project for the systemization of the GEAPs in each institution. That tool had only collected implementation related quantitative information and is therefore not included in this handbook. For the Interim Feedback Report monitoring related information was added, and the tool delivered both qualitative and quantitative information.

Structure of the tool

The Interim Feedback Report was developed as an Excel document, which has limitations when it comes to the amount of information that is possible to gather. The data that was collected on each activity in the GEAPs was necessarily very brief. However, as this was an interim feedback report only provisional information was needed and an Excel sheet was therefore appropriate. This was also in line with the aim of the tool.

The report consisted of ten columns where the national partners would update already previously provided information about each action and measure in the GEAPs.

Figure 7: Questions Interim Feedback Report

Implementation related information

- Action
- Objective
- Stage indicated in previous report
- Qulitative information provided in previous report
- Update on qualitative information
- Stage (completed/in progress/cancelled)

Monitoring related information

- Deviations in relation to the intial GEAP
- Success/support factors to report?
- Challenges/resistance to report?
- Short dscritption of success factors/ challenges

Results of the tool

The tool provided **evidence of the progress of the implementation processes** at the involved institutions by depicting in a comprehensible way the advancement of the GEAP realization.

The table helped to identify delays, postponements, resistance, challenges and hindering factors. It was also important for identifying support and success stories.

For actions that the national teams indicated as still progressing according to the plan, they were asked if they would categorize this as an example of a success story or not. And if this action would be recommended as such a success story, it would be studied more in detail to gain knowledge about the supporting factors and *why* this became a success story.

The actions that according to the teams were not proceeding like planned would be further investigated in order to possibly identify and understand challenges and hindering factors.

The information gathered was used for the development of the Peer Consultation Reflection Session workshop concept, which is described in the next chapter of this handbook.

Peer Consultation Reflection Session

Aim of the tool

The aim of the **Peer Consultation Reflection Session Monitoring Tool** was to create an arena where participants in the project could listen, reflect, share ideas and solve problems together and learn from each other's experiences of the implementation progress across the national teams. The tool was implemented during month 30 – more than halfway through the project – when most interventions had commenced and there was a need for support and sharing of knowledge and experiences.

Background of the tool

This tool was also, just as the Self-Assessment of Change Agent Role Monitoring Tool, based on considerations about **reflection** as an important monitoring methodology (Coleman and Ripping 2000). However, instead of personal reflection this tool introduced the concept of peer consultation.

The development of the tool was inspired by previous literature on **peer consultation reflection exercises** (Brown et al. 1999). Peer consultation reflection exercise is an innovative strategy for personal and professional development that can be used in many different settings - creating a valuable opportunity to interact and learn from colleagues. It is a method that encourages and helps people to see their situation from a different perspective and to understand problems in a different way. When the Peer Consultation Reflection Session is working well it promotes equality among participants and generates new ideas and solutions for both presenters and participants.

The tool was also developed as a result of using the inductive approach as these types of **arenas for knowledge sharing** was something that had been requested within the project and something that had previously been appreciated.

Structure of the tool

The Peer Consultation Reflection Session Monitoring tool was developed as one of several **workshop concepts** within the GenderTime monitoring program.

During one of the project meetings all participants were divided into four different peer reflection groups to discuss four different themes. After 30 minutes discussion in these four groups, four new groups were formed, discussing four new themes. Besides the themes to discuss the participants were also provided with instructions for *how* to discuss them.

The participants were expected to switch between taking on the role as a presenter, i.e. a person that describes and reflects over a situation, action, challenge or good practice and the role as reflection facilitators. Reflection facilitators are expected to pose questions to the presenter to further clarify the challenges or to further increase the understanding of the success factors. The participants in the groups thus form a so called peer reflection team that not only facilitates the reflections of the presenter but also contributes with their reflections on how to for example overcome challenges or how to best take advantage of the success factors.

The Peer Consultation Reflection Session Monitoring Tool was tailor-made because the eight themes that were discussed in the peer reflection groups were based on the information that the teams provided in the Interim Feedback Report (see previous tool description in this handbook).

In order to facilitate reflections to be shared in a helpful manner and to stimulate sharing of good advice and solutions to challenges the themes were constructed as so-called "how to"- themes. The reflection experiences were supposed to focus on **successes** and **challenges** within the specific "How to"-theme.

The first round of reflection sessions was organized around the following four themes:

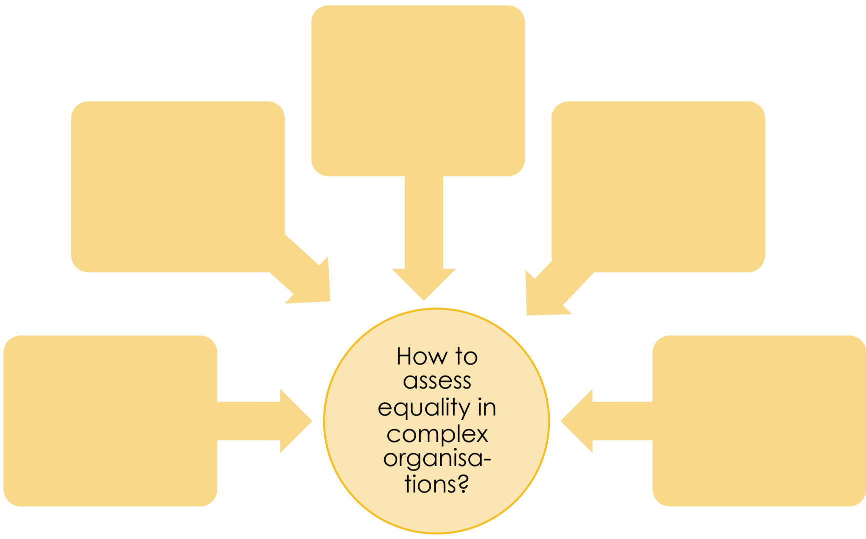
- How to assess equality in complex organisations (employment/salary)?
- How to understand the gendered career through interviews and focus groups?
- How to raise awareness within the organization?
- How to support women through mentoring?

The second round of reflection session was organized around the following four themes:

- How to monitor through gender sensitive indicators?
- How to identify career obstacles through exit interviews?
- How to disseminate good practices outside the organization?
- How to challenge male dominance through women's networks?

After 60 minutes everybody had participated in two Peer Consultation Reflection Sessions and a short "check-out" phase commenced, where one rapporteur in each of the eight teams reported back their main key insights that had surfaced during the reflection sessions. This "check-out" round revealed that the workshop concept had been successful as to providing an arena for sharing and reflection over a wide range of relevant and important themes. During the session there had also been a note taker in each eight team and the notes were made on so called "reflection sheets" (see below for an example).

Figure 8: Example of a "How to"-theme reflection sheet



Results of the tool

This tool provided interesting results for all 8 different themes. The challenges that were discussed concerned e.g. problems with developing indicators to make inequalities visible and lack of resources to collect data. The solutions involved suggestions about how already existing databases can be used in collaboration with HR departments.

Another important discussion concerned the role of women's networks. Here some challenges that were identified involved problems with involving women in networking activities and how to make women's networks powerful. Experiences of how men resisted women's networks were also shared as well as suggestions about how to create empowering face-to-face mentoring situations.

Incremental Transformation Process Monitoring Tool

Aim of the tool

The **Incremental Transformation Process Monitoring Tool** aimed at defining impact relatively and contextually in relation to the starting point in each participating institution. It was the first tool to be implemented during the final and third phase, the reflection phase, and it was therefore designed to allow for reflection on the two previous phases. As such it focused on facilitating an internal discussion within the GenderTime consortium about setting and achieving intermediate goals in a change project.

The purpose of the tool was thus to stimulate a discussion about how performance indicators, both qualitative and quantitative, can be identified, defined and used in a change project and how they can develop and change throughout the lifetime of a project.

The tool was tailor-made to collect specific information from each project partner.

Background of the tool

The Incremental Transformation Process Monitoring Tool was developed using a deductive approach, drawing on a comprehensive theoretical framework.

It was initially inspired by recommendations within evaluation theory, feminist theory and policy research, emphasizing the importance of including process criteria in evaluations of gender equality policies.

According to for example Krizsan and Lombardo (2013) evaluation involves linking such criteria to "incremental change in relation to institutional and contextual legacies" (Krizsan and Lombardo 2013, p. 86).

Focusing incremental change in specific contexts means among other things to acknowledge that the success of gender equality actions is dependent on the status quo compared to which these actions are adopted.

The Incremental Transformation Process Monitoring Tool also heavily draws on a theoretical model, developed by John P. Kotter, of an 8-step process of successful organizational change. This model constituted the foundation for the development of the tool.

The eight different steps are as follows: 1) Creating a sense of urgency about the changes needed. 2) Building a coalition within the organization. 3) Forming a strategic vision and initiatives about the changes. 4) Enlisting volunteers that are committed to the change. 5) Enabling action by removing barriers. 6) Generating short term wins. 7) Sustaining acceleration. 8) Instituting change.

These 8 steps are divided into three phases where steps 1 to 3 concern creating a climate for change. Steps 4 to 6 concern engaging and enabling the organization for change. Finally, steps 7 to 8 concern "making the change stick".

Using an inductive approach when developing this monitoring tool proved helpful as it became clear that all phases and several of the steps described in Kotter's model had already been the focus of several of the previous monitoring tools. However, the analyses also identified that some of these steps had not received enough attention. These steps were deemed highly important and therefore selected for the tool.

Structure of the tool

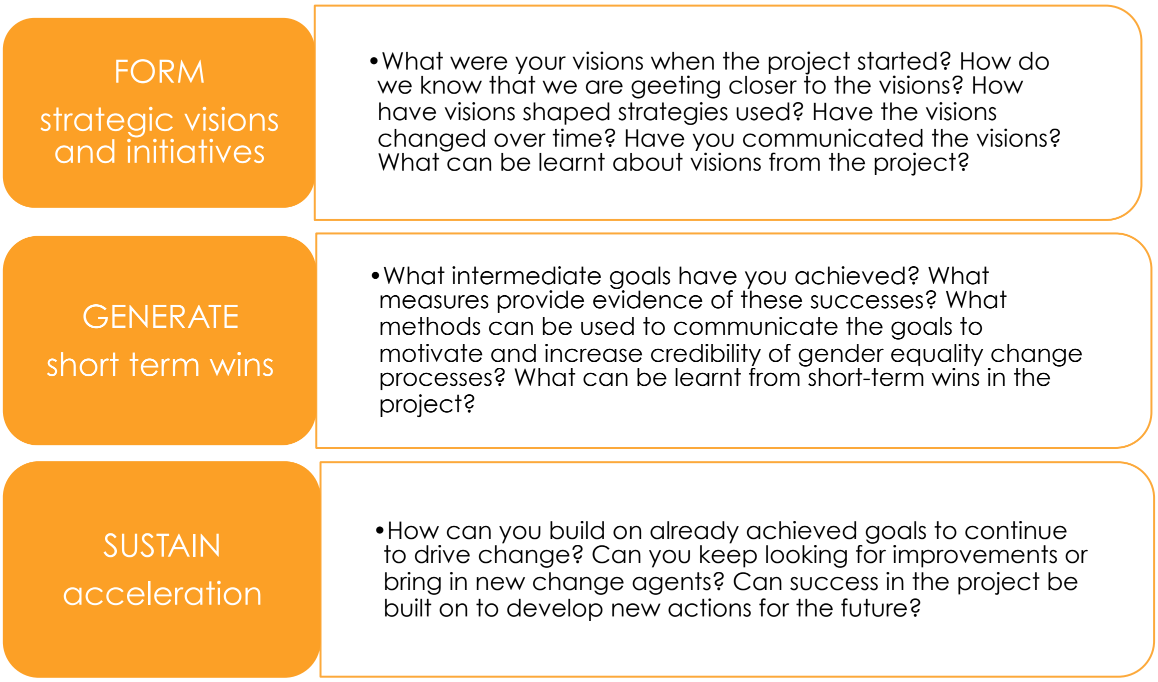
The Incremental Transformation Process Monitoring Tool was developed as a workshop concept and implemented during a project meeting.

The workshop started with an introduction of the tool and of the aim of using it. After this introduction the 15 participants – project members who implemented GEAPs - were divided into three groups for intense discussion and knowledge sharing during 45 minutes on one of three different topics:

1) How to form a strategic vision
2) How to generate short term wins
3) How to sustain acceleration of change processes

Each group documented their discussion in a tailor-made template (see figure 10-12 next page), which was collected afterwards. The outcomes of the small group discussions were reported and discussed within the whole team.

Figure 9: Incremental Transformation Process Monitoring Tool

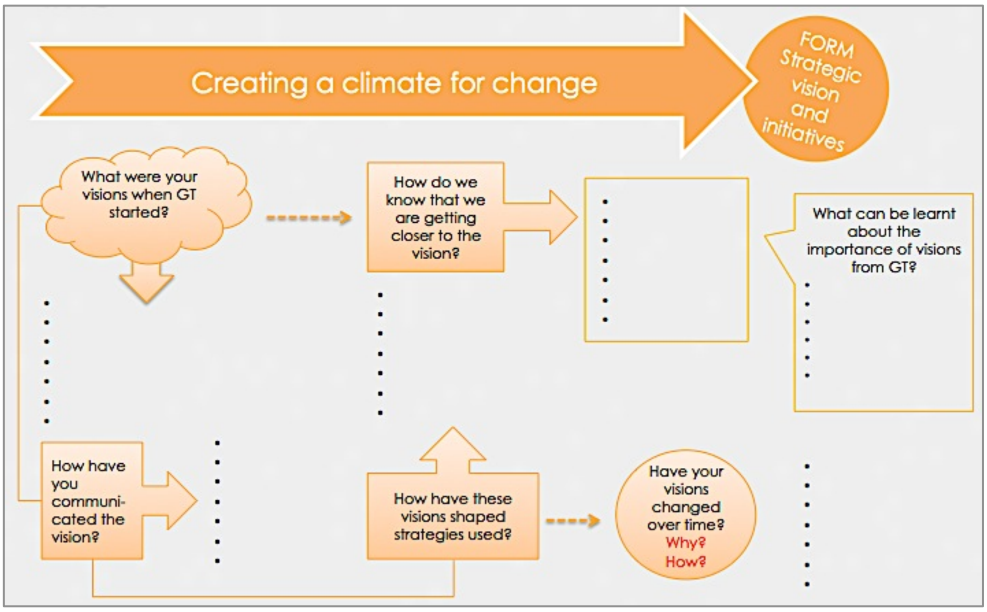


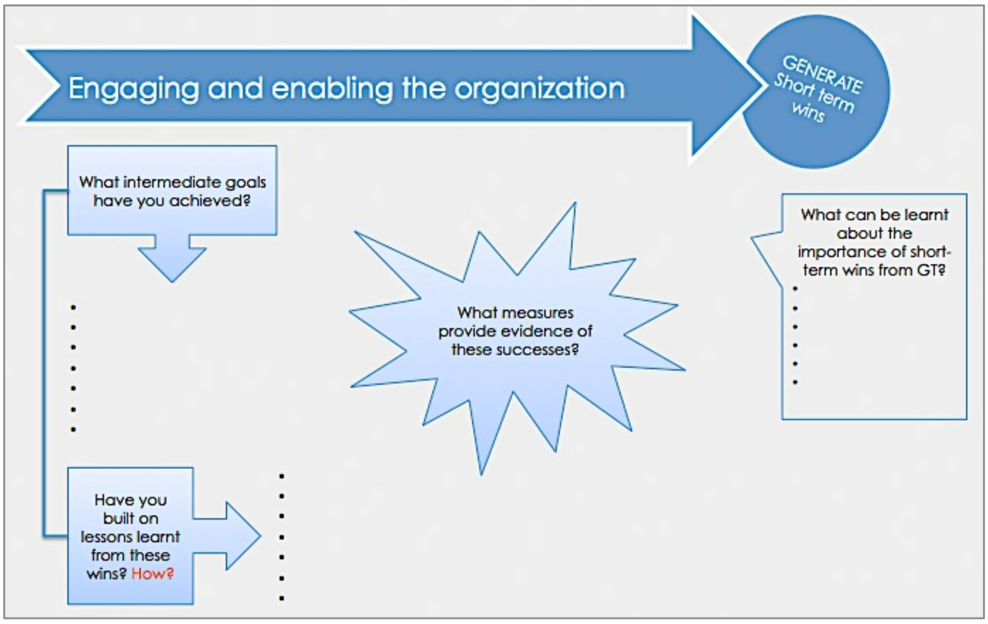
Results of the tool

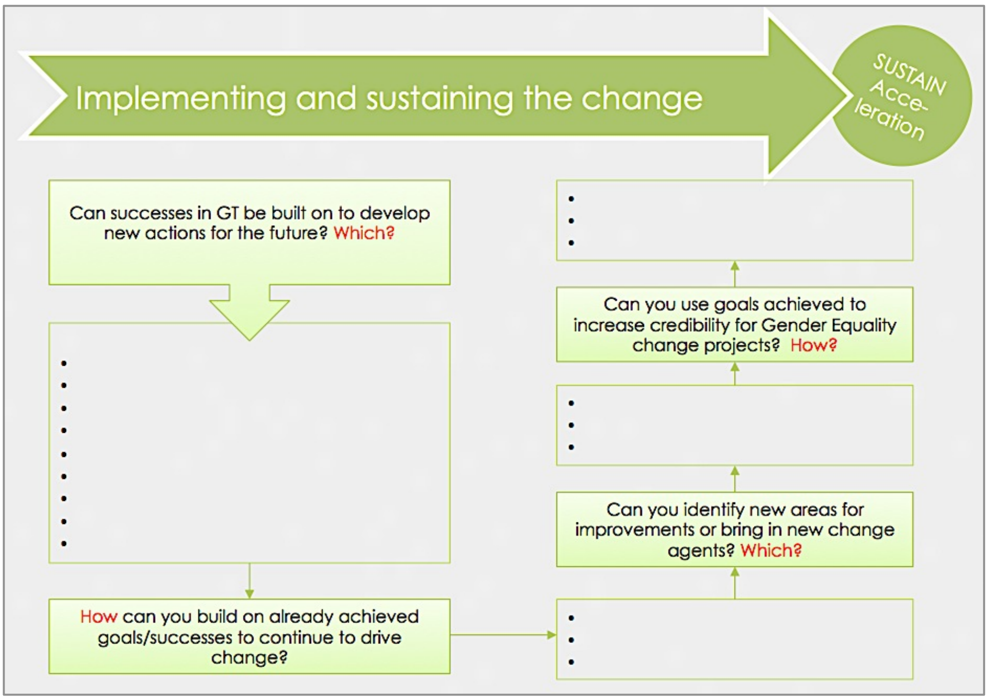
The workshop resulted in interesting discussions, reflections and recommendations. The discussions about the first topic showed how visions had changed over time in the national teams. While some had started from minimum requirement the visions had become more detailed, long-term and sometimes more linked to considerations about sustainability beyond the project lifetime. The importance of having realistic visions and flexible goals was emphasized as well as communicating the visions clearly in order to engage others in the change interventions.

The discussions about the second topic, about generating short term wins, resulted in recommendations about not starting to implement interventions where the resistance is the greatest. It also provided examples of how small successes could encourage and motivate change agents. Another recommendations concerned addressing personal interest and highlight the personal benefits.

The discussion about the third topic gave rise to recommendations about building a "super team" and bringing in new change agents in the project as part of succession planning. Networking was emphasized, both inside and outside of the organization.







Figures 10-12: Reflection templates for the Incremental Transformation workshop

Most Significant Change Technique

Aim of the tool

The **Most Significant Change Technique** was a monitoring tool used to collect participatory stories about change in order to monitor and evaluate the impact of the project. It focused on learning rather than accountability and identified the effects of the implementation of the GEAPs on people's lives and on their working environment.

This tool facilitated the gathering of information about outcomes and results that otherwise can remain hidden in a change project if only quantitative monitoring tools are used. The tool enabled the project participants to come to a better understanding of cultural changes and of their own role in the change process.

The aim of the Most Significant Change Technique, used as a monitoring tool, was:

- to collect evidence of intangible changes, like behavioural and attitudinal changes.
- to collect information on positive and unexpected changes.
- to collect information about changes of both individual character and organizational character (but from an individual perspective).

Background of the tool

Rick Davies and his colleagues developed the most significant change methodology already in the 1990s. It is a qualitative form of participatory monitoring and evaluation method that is based on stories (Dart and Davies 2003). It can provide evidence base for project improvement and impact evaluations. When used at the end of a change project it can gather evidence that can be used to introduce changes to future program indicators and contribute to the sustainability of the project.

The most significant change technique gathers rich descriptions that make intangible changes visible. It captures change stories as personal experiences and observations and requires the person that writes down the story to explain why a change was significant for them and provide both descriptive and interpretive information.

Structure of the tool

The Most Significant Change Technique was a monitoring tool that involved the beneficiaries and target groups of interventions, i.e. persons who participated in gender equality actions arranged within the project.

The tool was designed as a questionnaire/interview guide to collect participatory stories by way of two questions asking the participants to reflect over, and share, the most significant change of the GenderTime project from a personal and an organizational perspective, respectively.

The questionnaire template was distributed, together with a separate document with user guidelines, to the seven national teams, who identified potential informants, sent the questionnaire to them, collected them again approximately a week later and sent the answers received back to the monitoring team who analysed the responses.

This tool was also used as a workshop concept, implemented during the very last project meeting. The tool then allowed the participants in the consortium to share their views on the most significant change of the project. Again a template was distributed to each national team and during a 30 minutes discussion they reflected on this, taking down notes that were collected for analysis.

Figure 13: Questions of the Most Significant Change Technique tool

1) Describe below the project related activity/measure that you took part in. Reflect over the most significant change that you personally experienced in relation to participating in the activity.

It can be a direct change (you learnt something) or an indirect change (you made a change due to the information that you learnt).

Please explain why this change is important to you.

Examples: change in career possibilities and opportunities; change in awareness about gender and gender equality; changes in networks and contacts

2) In your opinion, what has been the most significant change that has occurred in your institution as a result of the project?

Please describe why this change is/was important to you.

Examples: change in attitudes, climate and culture; change in administrative routines; change in leadership and management; change in the physical environment etc.

Results of the tool

10 women and 1 man contributed with Most Significant Change stories related to the implementation of GEAPs. The stories were relatively short, but very complex and informative, stories. 23 individual stories about 9 different types of personal changes were submitted. These stories could be categorized into three different types of changes: changes in knowledge/awareness, changes in behaviour and changes in daily lives.

In addition, 31 stories about 14 different types of institutional changes were submitted. Also these changes could be categorized into three different types of changes: changes in culture, changes in practices/policies and changes in structures/management.

Remaining challenges were also identified: "Increased awareness and discussions did not lead to change in practices" and "No clear change in my institution".

Based on the stories submitted a theoretical framework could be developed – demonstrating a typology of dimensions of change along the lines of individual/collective, informal/formal and intangible/tangible. This framework and these dimensions were used as templates when implementing the monitoring tool as a workshop concept. The workshop participants were then asked to give examples of changes that could fit into these different categories.

Examples of individual and formal changes were described as involving greater importance in decision-making processes: "Management board includes me in many more issues because I could help improve certain topics with my gender knowledge, which is valued". The examples of tangible and collective results involved the realisation of a new, gender equal, salary system, gender budgeting, improved gender balance in boards and committees, gender networks and improved communications.

Final Feedback Report

Aim of the tool

The **Final Feedback Report** was the final monitoring tool to be implemented in the GenderTime project, together with the Most Significant Change Technique, during the very last months. The aim of this monitoring tool was to offer all team members the possibility to personally reflect one last time over the implementation process and progress during the last four years.

The Final Feedback Report had the following purposes:

- to collect information about lessons learned during the participation in the project
- to sustain the experiences made and make them available for future change agents
- to receive a final reflection on supporting and hindering factors during the implementation processes

The Final Feedback Report collected lessons learned that could be shared with people, who want to take up the challenge to make their institution more gender equal for all. The report was thus developed as part of the sustainability of the project.

Background of the tool

The Final Feedback Report was developed primarily using an inductive background.

The tool was designed taking previous feedback reports into account. The first of these reports, implemented already during the launching phase of the project, was not included in this monitoring handbook because it was more or less just a checklist over the different interventions in the seven different institutions and an update of the GEAPs. The second feedback report was the Interim Feedback Report, previously described.

The Interim Feedback Report contributed with important and relevant information during the implementation phase of the project. The information gathered, however, was brief and provided only an overview of the progress, suited for a quantitative analysis. The Interim Feedback Report was therefore considered limited. Although the same excel sheet that was used for the Interim Feedback Report could have been used also for the Final Feedback Report a different approach was considered more relevant and valuable for this final reflection phase.

The Final Feedback Report, in contrast, needed to collect more extensive information about the implementation process. Hence, a more comprehensive, qualitative approach was adopted.

Structure of the tool

The Final Feedback Report was designed in accordance with the other templates developed in the GenderTime project. As such it was structured as a questionnaires, with open-ended questions leaving considerable space for the participants to answer by writing quite extensive answers. The Final Feedback Report was distributed the same way, using the same distribution channel as the Most Significant Change Technique, i.e. via mail.

Instructions about how to fill out the questionnaire were also distributed together with the template.

It offered all GenderTime team members the possibility to personally and individually reflect one last time on the implementation process and progress in the project during the four years.

Instead of focussing on collecting quantitative data, as previous feedback reports, the tool covered the broader picture taking into account the experiences and knowledge gained by the team members directly involved in the work as change agents in their institutions.

The tool asked the participants to share their answers to three questions:

Figure 14: Questions of the Final Feedback Report

1) What kind of recommendation(s) or advice(s) would you give to a person, who wants to start implementing gender equality plans in her/his organization, based on what you have learned during the project?

Please explain why you think this is an important recommendation/advice.

2) If the project would start all over again in January 2017 – what would you do/organize differently?

Please explain in your answers also why you come to this conclusion.

Remark: Your answers should not be related to consortium related collaboration and work, we are interested in answers about the actual implementation process.

3) And finally, what would you do/organize exact the same way if the project would start all over again in January 2017?

Please explain in your answers also why you come to this conclusion.

Remark: Your answers should not be related to consortium related collaboration and work, we are interested in answers about the actual implementation process.

Results of the tool

10 Final Feedback Reports were submitted.

The replies to the first questions included a diverse set of recommendations. Commitment from the top management as well as from middle management was emphasized as important. Here it was stated: "The champion for change is key to success!". Others however also suggested that it was important to include all staff in the change efforts and engage them in a participatory way, e.g. by emphasizing the benefits of it for all. To be able to gain such commitment and involvement it was further recommended to "gather evidence!". This meant undertaking a survey or similar to confirm the relevance of a change project. This allows for a change agent to rely on facts instead of making assumptions about the situation. Awareness raising, defining and setting-up monitoring frameworks, and identifying allies and supporters were also suggested as important recommendations.

The replies to the second question, about what they would do different, included improving the timing of the work plan and making modification to the GEAPs in order to make them more tangible and manageable. Engaging people to take ownership for the actions planned and build a "task force" in the project was also considered as a way of improving the effectiveness and the results achieved. Defining and setting goals and a common understanding for the organization about what gender equality means was another task that could have been improved. Not all GEAPs included interventions for administrative and technical staff in the institutions and this was something that was considered problematic and therefore something that should be changed. Finally, it was suggested that they would not again underestimate the necessity of providing educational and information material on gender equality and gender issues for staff members and this was something that could have been improved.

Finally, the Final Feedback Report provided insights into what had been particularly successful aspects of the GenderTime project. Although most of the participants that submitted their response to the questions took the opportunity to reflect over possible improvements, several measures and actions in the GEAPs were underlined as highly influential, effective and successful. The specific knowledge transfer activities and the inclusion of transfer agents were also mentioned as important features to include in a gender equality change project such as this (Thaler 2016).

Recommendations for monitoring

Based on the experiences from monitoring in GenderTime the following recommendations can be formulated.

Make monitoring an integrated part of the project

This is a comprehensive recommendation that has several implications for the overall **planning** of monitoring. To integrate monitoring in the project means that it is considered a core part of the project and a continuous process throughout the different phases of the project. The implication of this is that monitoring activities should be planned parallel with other project activities.

Make monitoring a collaborative effort

This recommendation concerns the question about **participation** and who should be involved in monitoring activities. Making monitoring a collaborative effort means involving all project members. This involvement concerns not only the collection of information but also the assessments and analyses of the data gathered. Feeding back the results from the monitoring activities to the project members creates a dialogue about future improvements of the project– also of monitoring. This dialogue is essential for adopting an inductive approach.

Combine a deductive approach with an inductive

This recommendation concerns the overall strategy for the process of **developing** the monitoring strategy. Combining a deductive approach with an inductive means to draw on research-based literature about organizational change but to also let the monitoring process be flexible and guided by empirical observations of the change process being monitored.

Adapt to the project phase

This recommendation concerns the **timing** of monitoring. The intensity and frequency of monitoring should take into consideration the specific project phase. The implementation phase e.g. might call for more intense monitoring than the launching phase. The monitoring tools should also have different design depending on the phase. During the final phase they should e.g. allow for reflections of the complete implementation process (and thus might overlap with certain evaluation activities).

Combine qualitative and quantitative tools

This recommendation concerns how to **design** the monitoring tools. A diverse and unique set of monitoring tools should be adopted, with a wide range of methods and performance indicators; questionnaires, checklists, interview guides and workshop concepts for team discussions. Decisions about when to implement which tools should be based on considerations of the project phase. While the launching phase of a project may benefit from quantitative tools, the reflection phase may require qualitative tools.

Tailor-make monitoring tools

This recommendation concerns the **character** of the monitoring tools. Tailor-making monitoring tools means to design them while taking into account the specific, local, context that they will be implemented in and allow for them to be adapted to this context. This tailor-making aspect cannot be achieved without monitoring being an integrated part of the project or without it being a collaborative effort.

Collect diverse and varied data

The final recommendation concerns the **data** collected. Monitoring tools should collect data and information with a focus on diversity, variety and inclusion. The implication of this is that monitoring tools should include the direct involvement of both project members and so-called target groups or beneficiaries of project activities.

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Further information on the GenderTime project can be found on www.gendertime.org.

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