INSPIRE

SPkg 4 – Sustaining & Deepening change

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List of Acronyms

GE	Gender Equality
IGE	Inclusive Gender Equality
GEP	Gender Equality Policy/Plan/Program
IGEP	Inclusive Gender Equality Policy/Plan/Program
SPkg	Support Package
RPO	Research Performing Organisation
RFO	Research Funding Organisation
R&I	Research and Innovation
GI	Gendered Innovations
IGIP	Inclusive Gendered Innovation Policy/Plan/Program
IGI	Inclusive Gendered Innovation
EU	European Union
EC	European Commission

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Introduction: Aim of the Support Package

The aim of Support Package 4 (SPkg 4) is to provide a practical resource for promoting long-term change in gender equality, diversity, and inclusion efforts within Research Performing Organisations (RPOs) and Higher Education Institutions (HEIs). This support package addresses key issues and offers tools to initiate and support institutional and organisational change. It supports practitioners, researchers, activists, students, and communities involved in diversity and equality work in higher education and research by presenting up-to-date research insights, strategies, and tools. The support package emphasises an intersectional approach that goes beyond traditional Western notions of gender equality, aiming to include and centre diverse identities and perspectives, particularly through the lens of intersectionality in equality efforts.

Content of Support Package 4

This Support Package focuses on the theme of Deepening and Sustaining Change in research and innovation (R&I). While this is a broad topic, we've identified and focused on three key areas that are especially relevant for practitioners and stakeholders:

1. Monitoring and Evaluation
2. Intersectionality
3. Power, Backlash, and Resistance to (Gender) Equality and Diversity

Each of these topics is explored in a dedicated chapter to provide practical guidance and insights for advancing long-term, embedded change through a multi-level, holistic approach.

- **Chapter 1:** Monitoring & Evaluation introduces the topic and shares tools, strategies, and recent findings from the INSPIRE project, including factors that support or hinder Gender Equality Plan (GEP) work. The chapter ends with a practical table of resources for easy reference.
- **Chapter 2:** Intersectionality explains the concept—rooted in Black feminist thought—and why it's essential for building inclusive and just higher education systems. It delves into the importance of shifting GEP work towards IGEP work and explores core ideas like critical reflexivity and positionality. The chapter also offers practical advice for addressing common challenges in integrating intersectionality into GEP work.
- **Chapter 3:** Power, Backlash, and Resistance looks at how resistance to equality efforts can provide an entry point for deeper change. It breaks down different types of resistance—whether implicit or explicit, individual or institutional—and provides tools for navigating them. The chapter also includes a curated list of helpful resources for daily organisational work.

Together, these chapters aim to offer a grounded, actionable, and multi-sited resource to support long-term progress in equality, diversity, and inclusion within research performing organisations and higher education institutions.

Drawing from sources of inspiration

This resource draws on the latest findings from the INSPIRE project, as well as valuable tools and insights from related feminist projects such as MINDtheGEPs, GENDERACTIONplus, GenderSAFE, CCINDLE, FIERCE, RESIST, and others, including completed initiatives like ACT, CALIPER, TARGET, SPEAR, UniSAFE, EFFORTI, and SUPERA. Most of the materials included were created to support those working on equality in research performing organisations (RPOs) and higher education institutions—many specifically focus on developing and implementing Gender Equality Plans (GEPs).

While the 2022 GEP requirement for Horizon Europe funding has driven some recent progress, this support package is designed to be useful regardless of whether your organisation has or needs a GEP. What's most important is tailoring any policy or tool to your specific context. Research consistently shows that effective equality work depends on adapting strategies to the particular discipline, organisation, and geopolitical setting. For example, Chaves and Benschop (2023) emphasize that gender practices differ across academic fields, and therefore equality policies should be context specific.

With that in mind, we encourage readers to reflect on how the guidance and tools offered here can be applied—or adapted—to your own organisational setting, considering factors like local legislation, institutional culture, and broader national or regional dynamics.

1.What is Monitoring and Evaluation?

Why are monitoring and evaluation important to sustaining and deepening change?

Monitoring and evaluation (M&E) are essential for making long-term progress in gender equality, diversity, and inclusion. They help track whether activities—such as those in Gender Equality Plans (GEPs)—are not only being implemented as planned but also whether they are effective and making a real impact. By using the right indicators, you can assess whether your initiatives are reaching the right people, having the desired effect, and moving the organisation toward meaningful change.

However, effective M&E is often missing or underdeveloped. Without it, it's hard to know what's working, what needs to change, or where to focus efforts. As research shows (e.g., Chaves & Benschop, 2023), if data collection is weak or if goals aren't linked to relevant indicators, it's difficult to measure success or transformation.

This lack of clarity can also lead to reduced engagement from stakeholders and slow down momentum. On the other hand, strong M&E processes can drive accountability, improve decision-making, and increase understanding of how and where change is happening[1].

Good M&E also allows for flexibility: it helps you adjust your actions if needed and clearly identify what needs to happen next and who is responsible. This clarity supports responsibility, transparency, and accountability—all of which are critical for real change.

Finally, strong M&E doesn't just measure what's already been done—it also helps identify gaps, learn from past efforts, and improve future initiatives. By reflecting on what hasn't worked and why, organisations can better tailor their strategies and foster deeper, long-lasting change[2].

What is Monitoring? What is Evaluation?

Monitoring and evaluation (M&E) are closely related but serve different purposes, and both are essential for creating long-term change in gender equality, diversity, and inclusion efforts.

Monitoring is an ongoing process that involves regularly collecting data to track whether activities are on course and objectives are being met. It helps ensure that initiatives are progressing as planned and that resources are being used effectively. For example, under EU GEP requirements, it is mandatory for organisations to develop yearly monitoring reports to show how their Gender Equality Plan is progressing. Monitoring can highlight when adjustments are needed and helps decision-makers stay informed throughout the life of a project.

Evaluation, on the other hand, is a more in-depth process that typically happens at the end of a project or funding cycle (summative evaluation) —though mid-term evaluations (formative evaluation) can also be useful. Evaluation looks beyond whether activities were completed and asks about meaningful outcomes and impacts. It assesses both how well an initiative was carried out (its merit) and whether it responded to a real need (its worth). For example, a training session might meet its attendance target, but if it doesn't actually improve participants' understanding or behaviour, then its impact is limited.

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[1] In an overview of the literature on deepening and sustaining organisational change towards inclusive gender equality in Research and Innovation Organisation, Chaves & Benschop (2023) finds some learning lessons for the design and implementation of gender equality: "Policies need to be (re)formulated to include very clear actions and responsibilities, naming exactly who bears responsibility for these actions, and, what consequences are in store if these actions are not carried out. This highlights how responsibility, transparency, monitoring, evaluating and accountability are key aspects for the implementation of any policy design." (Chaves & Benschop, 2023, p. 5). Chaves and Benschops scoping review is based on review of 189 articles and a critical analysis of 97 articles published in English since 2017. (Chaves & Benschop, 2023, p. 5).

[2] It is notable that the current GEP requirement policy for R&I institutions applying for Horizon Europe funding states that institutions must cover four minimum process-related requirements, with monitoring and indicators being central to one of them: "data collection and monitoring: sex and/or gender disaggregated data on personnel (and students, for the establishments concerned) and annual reporting based on indicators" (European commission, 2021, p. 9) (See page 9 for a full description of the mandatory requirements). This requirement helps exactly to push for greater accountability, transparency and sustainability of GEP initiatives.

It's also important to recognise that evaluation is not purely objective. Judging whether an initiative is successful involves making decisions about what outcomes matter and how they should be measured. These decisions are shaped by values, politics, and context. In our work through INSPIRE, which is grounded in an intersectional feminist and decolonial perspective, we see evaluation as more than just a technical process—it's also about reflecting on power, purpose, and who benefits from specific actions.

Understanding these distinctions and acknowledging the value-driven nature of evaluation helps ensure that M&E processes are not only useful but also meaningful. They provide insight into what works, for whom, in which context, and why—ultimately supporting more intentional, inclusive, and lasting change.

Quick overview of Monitoring and Evaluation

Monitoring and evaluation serve different but complementary purposes in equality work. Monitoring focuses on tracking progress during an initiative—checking whether activities are being carried out as planned and if key milestones are being met. It provides regular updates that help teams adjust actions in real time. Evaluation, by contrast, takes a step back to critically assess the overall effectiveness, efficiency, and impact of an intervention. It looks at whether the initiative achieved its goals, whether it addressed real needs, and how it could be improved for the future.

The timing also differs: monitoring happens continuously or at regular intervals throughout a project, while evaluation is usually conducted at the end of a funding or GEP cycle—though mid-term evaluations are also possible. For example, Horizon Europe requires organisations to submit annual monitoring reports, but a full evaluation would go further by analysing the outcomes and learning from the experience.

A Feminist Approach to Monitoring and Evaluation

Leading voices in gender equality and political science emphasise that monitoring and evaluation (M&E) must take a distinctly feminist and transformational approach to drive real organisational change (Schmidt, Palmén, & Bührer, 2023). Without this perspective, M&E risks reinforcing limiting gender norms and missing the deeper structural issues that sustain inequality.

It's important to note that not all gender-related evaluation methods are inherently feminist or transformational. For example, while gender-sensitive approaches acknowledge gender, they can still unintentionally uphold stereotypes and maintain the status quo. A feminist approach, by contrast, focuses on uncovering and addressing systemic power imbalances and the root causes of inequality. Recognising this distinction is essential when evaluating gender equality efforts. With this foundation in place, we now turn to the key components of effective monitoring and evaluation.

1.1 Main components of an evaluation

When evaluating Gender Equality Plan (GEP) work, several core elements should be considered to ensure a thorough and meaningful process:

1. **Organisational Context** – Begin by assessing the current state of gender equality within the institution. This includes reviewing existing policies, practices, and gender representation data.
2. **Objectives and Actions** – Evaluate whether the GEP's goals are clearly defined, measurable, and aligned with the broader equality strategy.
3. **Implementation Process** – Examine how the GEP is being put into practice. This includes tracking progress, identifying challenges, and assessing whether resources are being used effectively.
4. **Impact Assessment** – Determine whether the actions taken have led to real change, such as better gender balance, increased inclusivity, or reduced discrimination.
5. **Sustainability and Future Planning** – Consider how progress can be maintained and built upon over time. This includes planning for ongoing improvement and adapting as needed.

Importantly, evaluations should be participatory, involving a wide range of stakeholders—especially those from underrepresented groups—to ensure diverse perspectives and meaningful results.

As outlined in the CALIPER project's Evaluation Methodology (Sangiuliano, Cescon, Palmén & Müller, 2021), the evaluation process can also be viewed through three main stages: design, implementation, and impact. This structure helps clarify what's working, what needs adjustment, and how the GEP can evolve to meet long-term goals. Evaluations can be formative or summative. A **formative evaluation** is conducted during a project's development to improve its design and performance by providing ongoing feedback. In contrast, a **summative evaluation** assesses the overall effectiveness and outcomes after the project is completed, helping determine its impact or value.

1.1.1 Design of the Intervention (GEP)

The first step of any evaluation process is to assess the **design** of the intervention, in this case, the Gender Equality Plan (GEP). A **formative evaluation** emphasises the importance of understanding whether the intervention was well-conceived and if it properly addresses the specific needs of the organisation or target group. A well-designed GEP should outline clear, realistic, and contextually relevant actions that address gender inequalities within the institution.

The design assessment should evaluate whether:

- The objectives of the GEP are clearly defined, measurable, and aligned with the organisation's broader strategic goals.
- The planned actions (e.g., gender-sensitive recruitment, leadership development for women, and measures to close the gender pay gap) are suitable and feasible in achieving the desired gender equality outcomes.

- The chosen interventions and tools (e.g., gender audits, training programs, flexible working arrangements) are appropriate for tackling the specific gender inequalities identified in the baseline assessment.

- There is a strong theoretical foundation underpinning the GEP, ensuring that the measures chosen are based on evidence and best practices. (see e.g., **EIGE framework** and **TARGET Tool**).

In formative evaluation, this step involves asking questions like: *Are the planned actions and tools suitable for the organisational context? Are they likely to result in meaningful change?* It's critical to ensure that the GEP design has the potential to deliver sustainable and impactful results, with a clear logic model or theory of change that links activities to outcomes.

1.1.2 Implementation of the Intervention (GEP)

The **implementation** phase of the evaluation assesses whether the GEP is being executed as planned and with sufficient efficiency. Even a well-designed intervention can fail if it is poorly implemented—due to factors such as lack of resources, inadequate engagement from decision-makers, or resistance within the organisation. In this phase, formative evaluation is key, as it provides an opportunity to identify problems early and suggest corrective measures to ensure successful execution.

For the GEP evaluation, implementation analysis should focus on:

- **Resource Allocation**: Are sufficient financial, human, and technical resources dedicated to the GEP? The TARGET Tool emphasises monitoring whether the necessary resources (e.g., budget, staff, training) are being allocated efficiently and whether the activities are on schedule.
- **Stakeholder Engagement**: Is the GEP being supported by key decision-makers and relevant stakeholders within the organisation? Are there clear communication and feedback mechanisms in place? Regular consultation with stakeholders, including women and marginalised groups, is critical for identifying barriers and improving the plan's execution.

- **Monitoring and Adaptation**: Are regular monitoring mechanisms in place to track progress? The TARGET Tool suggests using specific self-assessment tools or checklists to ensure ongoing monitoring. For instance, if certain measures (like gender-sensitive hiring practices) are not being effectively implemented, the GEP can be adjusted to address these shortcomings.

- **Process Evaluation**: Are there any internal barriers or challenges hindering the smooth implementation of the GEP (e.g., lack of buy-in from staff, poor coordination between departments, insufficient training)? Formative evaluations often involve surveys, interviews, and focus groups with employees to gather real-time data on the implementation challenges, providing actionable insights for mid-course corrections.

In this phase, the evaluation asks questions like: *Are the planned actions being carried out efficiently? What obstacles or challenges are arising? How can implementation be improved to ensure greater success?*

1.1.3 Outcomes & Impact of the Intervention (GEP)

The final area of evaluation focuses on the outcomes and impact of the GEP. This is typically the principal goal of a summative evaluation, but formative evaluations also consider the early and medium-term outcomes. For GEPs, measuring outcomes and impact involves assessing both desired and unintended effects of the intervention, whether positive or negative.

Outcomes might include:

- **Short-term outcomes**: Changes in attitudes toward gender equality, increased awareness of gender issues, or the establishment of new gender-equal practices (e.g., more women in leadership roles, better work-life balance policies).
- **Medium-term outcomes**: Improvement in organisational gender equality indicators, such as the narrowing of the gender pay gap or a more gender-diverse recruitment pool.
- **Long-term impact**: Institutionalised gender equality practices that result in a cultural shift towards gender equity in all aspects of the organisation's operations.

Formative evaluations, while often focused on identifying early outcomes, still need to address the long-term vision by ensuring that the GEP has clear, measurable objectives that can later be tracked through **summative evaluation**. Additionally, this phase involves identifying unintended consequences—such as resistance to change, the emergence of new gender disparities, or backlash against gender equality policies—that could undermine the GEP's effectiveness.

Different gender equality evaluation tools such as CALIPER's Evaluation Methodology, EIGE framework and TARGET Tool all stress the need to measure gender-specific outcomes, as well as assess broader organisational impacts like improved employee satisfaction, increased diversity in leadership, or changes in organisational culture. Tools like surveys, gender audits, and focus groups are essential in measuring both quantitative and qualitative outcomes.

The evaluation asks: *What changes can be attributed to the intervention? Are these changes positive, negative, or neutral? What other factors contributed to the outcomes? How can unintended consequences be addressed in future actions?*

Integrating the Three Pillars of Evaluation

By incorporating the following three pillars of evaluation, the evaluation process becomes a dynamic, iterative cycle, focused on improving the GEP over time. The three pillars—**design**, **implementation**, and **outcomes/impact**—interact in a way that allows organisations to:

- Adjust and fine-tune the **design** of the GEP based on ongoing insights from the **implementation phase**.
- Monitor progress continuously, identifying any deviations or challenges in the execution of the plan.
- Measure outcomes progressively, allowing for early identification of successful actions and necessary improvements.

Ultimately, integrating these methodologies helps to ensure that the GEP is not only achieving its objectives but also adapting to the specific needs of the organisation and the evolving landscape of gender equality. By responding to the formative evaluation questions—**Is the intervention well-designed? Is it being implemented effectively? What are its outcomes and impact?** — organisations can improve their GEPs in a way that maximises gender equality outcomes and ensures sustainable organisational change.

How do you plan your monitoring process:

1) Identify concrete output indicators
   - identify output indicators for each of your measures
   - collection of the relevant data needs to be feasible with the resources available
2) Select appropriate data collection instruments
   - data from different institutional resources
3) Come up with a time frame
   - annually monitoring reports published on the organisation website to meet the Horizon Europe requirements
4) Plan regular monitoring sessions

Source: EIGE. European Institute for Gender Equality. (2022). *Gender Equality in Academia and Research—GEAR tool: Step 5: Monitoring progress and evaluating a Gender Equality Plan. GEAR-tool step 5*

How to plan your evaluation process:

1. Think about the context
   - evaluation is more extensive than your annual monitoring, therefore consider time and (human and financial) resources available to you
2. Identify additional impact indicators
   - consider output indicators in your evaluation and also focus specifically on the impact of your implemented measures
   - include both quantitative and qualitative indicators, as some measures cannot be properly assessed by looking only at quantitative figures

3. Use additional (qualitative) data collection instruments
   - qualitative techniques will allow you to gain a deeper understanding of the impact of your measures, e.g., individual interviews, focus groups, participatory workshops, document analyses or participant observation
   - Take your monitoring results into account
4. You evaluate at the end of your GEP cycle. In your final data analysis, also include the results of your monitoring process.

Source: EIGE. European Institute for Gender Equality. (2022). *Gender Equality in Academia and Research—GEAR tool: Step 5: Monitoring progress and evaluating a Gender Equality Plan.* GEAR-tool step 5

Examples of what you can evaluate:

An evaluation can respond to three questions:

1. Design: Was a specific intervention well designed? Have the right tools been chosen for the right goals?
2. Implementation: Was a specific intervention implemented efficiently? Has there been sufficient resources? Have the relevant decision makers been involved?
3. Outcomes and impact: What was the effect of a specific intervention? What changes – both desired and unintended, positive or negative – can be attributed, to a given intervention? (Sangiuliano, Cresco, Palmén & Müller et al. 2021, p. 13).

1.2 Methods

An effective evaluation depends not only on what is being assessed, but also on how data is collected and used. This involves gathering both primary and secondary data. Primary data refers to new information collected specifically for the evaluation—such as feedback from workshop participants. Secondary data includes existing materials like reports, statistics, or previous research.

The choice of methods depends on the evaluation questions. A common (though debated) distinction in research is between quantitative and qualitative approaches:

- **Quantitative data**, often collected through surveys or questionnaires, helps measure the extent of an issue—such as satisfaction levels or attitudes. When well-designed, this data can be used for broader generalisations using statistical analysis. However, collecting

meaningful quantitative data requires valid and reliable tools that are properly tested and calibrated.

- **Qualitative data**, gathered through methods like interviews, focus groups, and observations, explores how people experience and interpret their surroundings. It offers deeper insights into context, values, and perspectives—especially useful for complex issues that can't be easily quantified. This approach demands thoughtful design of tools to ensure consistent, in-depth responses.

Both approaches require adherence to established quality and ethical standards. Mixed-methods evaluations, which combine both data types, are increasingly popular as they offer a more rounded understanding when executed carefully.

Feminist research methods further emphasise the importance of attending to power dynamics and structural inequalities throughout the data collection and analysis process. Resources such as Hesse-Biber (2012) and Ackerly & True (2020) provide helpful guidance for those taking a feminist approach to evaluation.

Methods Summary

In summary, it is necessary to pay attention to the importance of selecting appropriate data collection methods based on the evaluation questions. Quantitative data, gathered through standardised instruments like surveys, is essential for generalising findings across larger populations and measuring constructs such as motivation and satisfaction.

Conversely, qualitative data, obtained through interviews and observations, provides deep insights into individual experiences and perceptions. Both data types must adhere to rigorous quality standards, with measurement instruments carefully calibrated to ensure validity and reliability. By integrating different approaches, evaluations can achieve a comprehensive understanding of interventions, balancing generalisability with rich, contextual insights.

1.3 Indicators

An indicator is "an item of data that summarises a large amount of information in a single figure, in such a way as to give an indication of change over time, and in comparison to a norm" (Beck, 1999; cited in Wroblewski & Lietner, 2022:38). Given the multifaceted nature of gender equality, any gender indicator can only serve as an approximation. It provides a simple and reliable means to either 1) measure achievement, 2) to reflect the changes connected to an intervention, or 3) to help assess performance. In order to be useful, an indicator must be carefully selected and formulated, and thus they must be specific to the organisations GEP objectives, implemented measures, and activities. Indicators are needed both in monitoring (e.g., is an activity on track) and evaluation (e.g., has the activity had its desired impact). As such, it is important to know exactly which kinds of concrete indicators are helpful in order to analyse the effectiveness of a given GEP activity.

To effectively track progress and establish a baseline, it's important to develop specific indicators based on the targets outlined in your GEP. These indicators are essential for holding stakeholders accountable for the success or failure of implemented actions. Resources such as the *Evaluation Framework for Promoting Gender Equality in Research and Innovation* (EFFORTI) toolbox can assist you in identifying both quantitative and qualitative indicators to assess the outputs, outcomes, and impact of your measures.[3]

It is notable here that, depending on the specific organisational and national context you are working in, the following indicators may have to be adapted to the specific context of your GEP.

Quantitative Indicators

- staff numbers by gender at all levels, by disciplines, by function (including administrative/support staff) and by contractual relation to the organisation;
- average numbers of years needed for women and for men to make career advancements (per grade);
- wage gaps by gender and job;
- numbers of women and men in academic and administrative decision-making positions (e.g., boards, committees, juries);
- numbers of women and men candidates applying for distinct job positions;
- numbers of women and men having left the organisation in the preceding years, specifying the numbers of years spent in the organisation;
- number of staff by gender applying for / taking parental leave, for how long they took leave and how many returned after taking the leave;
- numbers of absence days taken by women and by men differentiated, by absence motive (sick leave, care leave etc.);
- numbers of training hours/credits attended/received by women and men;
- numbers of women and men students at all levels and for all disciplines, and academic and employment outcomes;
- shares of women and men among employed researchers;
- shares of women and men among applicants to research positions, among people recruited and success rate, including by scientific field, academic position and contract status;
- shares of women and men in recruitment or promotion boards and as heads of recruitment or promotion boards, and shares of women and men in decision-making bodies, including by scientific field;
- number of gender study modules in degree/ masters/ doctoral programmes;
- number of degrees/ masters/ doctoral programme – where the main focus is gender;
- number of research projects that integrate a gender dimension into their research;
- number of research projects where the main focus is gender.

[3] https://efforti.org/

Thematic Areas for Indicators

- **Mainstreaming of gender knowledge:** Look at how gender equality is embedded in the organisation—e.g., through the relevance and status given to dedicated programmes, institutional structures, or the inclusion of gender topics across disciplines.

- **Awareness among staff and stakeholders:** Track engagement with gender equality across different roles (e.g., staff, reviewers, applicants) via communication efforts, codes of conduct, and training initiatives.
- **Implementation of GEP objectives:** Monitor participation in measures, levels of acceptance, and the allocation of human and financial resources.
- **Organisational change:** Assess shifts in both formal and informal practices—such as more inclusive decision-making or attention to women's perspectives, especially in male-dominated areas.
- **Gender equality culture:** Observe everyday behaviours, working conditions, and practices around work–life balance, communication, and responses to issues like harassment or discrimination.

It's important to consider short-, medium-, and long-term indicators to capture both immediate effects and lasting change. Also, apply an intersectional approach to your data. Where possible, disaggregate by factors such as race, disability, socio-economic background, gender identity, and sexual orientation. Always ensure compliance with data protection laws and national regulations when handling personal data. More on intersectionality follows in the next chapter.

1.4 Formative Evaluation Methodology

This chapter offers guidance for RPOs and RFOs on how to plan and carry out a formative evaluation of their GEP. As discussed earlier, formative evaluations are carried out during the implementation phase to improve performance and ensure the GEP stays on track.

A formative evaluation builds directly on the GEP design and supports implementation by providing ongoing feedback. It helps identify what's working, what needs adjustment, and how to better align actions with objectives. To be effective, formative evaluation should be built into the IGEP from the start. This allows for regular feedback loops, supports better decision-making during implementation, and sets the stage for a final summative evaluation, which will be covered later in this support package.

A strong GEP includes:

- Clear, evidence-based objectives
- Specific actions
- Responsible actors
- Timelines and targets

Linking these elements to the results of your initial audit will strengthen both your GEP and the evaluation process.

1.4.1 Design Evaluation

This section explains how to design an evaluation for an intervention. Evaluation design often starts with desk research—reviewing current research and best practice examples. Sangiuliano, Crescon, Palmén and Müller (2021) highlight key questions to consider when designing an evaluation:

- Who is the target audience? (e.g., PhD candidates, schoolteachers)
- What are the goals? (e.g., attract more girls to STEM careers)
- What outcomes and impacts are expected? (e.g., less stereotypical career choices)
- What activities are planned? (e.g., awareness campaigns)
- Which indicators will track progress? (e.g., increase in female STEM students)
- What resources are available? (e.g., part-time staff, NGO collaboration)

A useful tool for organising these elements is a log-frame (logical framework). A log-frame helps map out how an intervention is expected to work, including the target audience, goals, activities, and the wider context such as national policies or organisational culture that may support or hinder success.

Log-frames also highlight the complexity of driving organisational change and rely on existing research to estimate the likelihood of success.

The CALIPER project adopted a log-frame template aligned with its evaluation methodology, making it a key tool both for planning GEP activities and evaluating them afterward. However, while the log-frame organises key components, it doesn't determine the specific methods or tools to be used in the evaluation—those choices remain up to the evaluators.

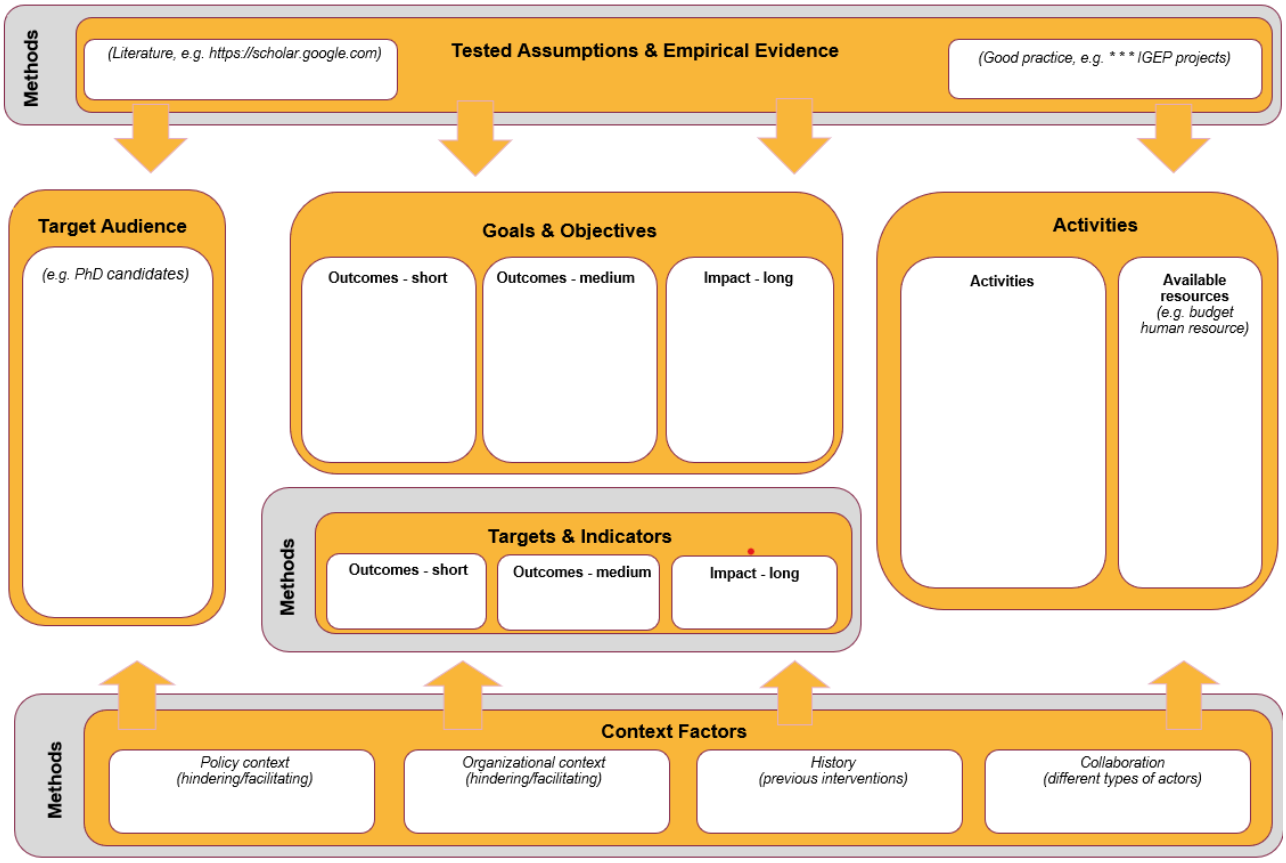


Figure 1: Evaluation Design Template (log-frame) (Sangiuliano, Cresco, Palmén & Müller 2021, 19)

Concrete Examples from GE praxis

In the following, each element of the log-frame will be introduced using a concrete intervention example. The concrete example used is a Mentoring for Change program developed at the Faculty of Health Sciences at the University of Southern Denmark (SDU).

Tested Assumptions & Empirical Evidence

The EU has identified a problematically high attrition rate in academia, particularly for certain groups. Several studies and reports have highlighted concerns regarding high dropout and attrition rates among early-career researchers, female academics, and scholars from underrepresented backgrounds. This concern is highlighted in reports such as the **"**She Figures" (2024), which provides statistical data on gender equality in research and innovation across the EU. This is also named 'the leaking pipeline'.

Inadequate mentoring and career development support have been identified as significant factors leading to attrition. Early-career researchers, in particular, may feel isolated or lack guidance on how to navigate the academic system, which can contribute to burnout or disillusionment. Many systems within academia—such as rigid academic hierarchies, gender biases, and exclusionary practices—can create environments where individuals from underrepresented groups, including women, people of colour, and those from lower socio-economic backgrounds, feel unsupported or undervalued. This can push them to leave academia prematurely.

The EUs GEP requirement from 2022 can play a crucial role in addressing the "leaky pipeline" in research and innovation by creating an environment that supports and retains women at all career stages by addressing systemic issues that contribute to gender disparities in academia, including high attrition rates among female researchers.

A mentoring program can contribute to strengthening the talent pool in academia, not just for women, but for all underrepresented groups or early-career scholars and academia often lose talented individuals early in their careers due to a lack of support or mentorship. A mentoring program is designed to foster personal and professional growth by pairing less experienced individuals, known as mentees, with more experienced mentors.

Dr. Jennifer de Vries recommends taking a **bifocal approach to mentoring.** The recommendation is based on her research on gender and orgnisational change: both the individual mentee's career will benefit, and the organisation can change culturally and structurally towards equal opportunities (de Vries and van de Brink 2016).

A bifocal mentoring program incorporates both top-down and bottom-up mentorship structures, where the mentor and mentee benefit from the exchange in different but complementary ways. The "bifocal" concept suggests that both participants in the mentoring relationship gain insight and value, but from different perspectives and experiences. Thus, it supports young researchers (PhD students, postdocs and assistant professors) relating critically/critiquing to structures and dynamics in academia in order to use this in navigating the academic system and in their own career planning and development as researchers. At the same time the knowledge that is shared and created during mentorship meetings about what structural challenges young researchers face in academia should be communicated to departments and university leaders in order for them to use this knowledge in the development of the working environment, well-being and career perspectives for the target group.

Outcomes vs. Impact, defined:

"**Outcomes** usually refer to changes in attitudes, knowledge & skills, motivation, interests, or behaviour of participants which can be observed immediately or over a relatively short period of time. Outcomes can be subdivided in **short-term** (less than 1 year) or **medium-term** outcomes (1 to 2 years)." (Sangiuliano, Cresco, Palmén & Müller et.al. 2021, p. 21).

"**Impact** is broader in scope in terms of affected changes and audiences. A program can have impact across different dimensions, including among others, economic - (e.g., competitiveness), social - (e.g., equality, social cohesion), or technology and innovation (e.g., new services, products, standardization, etc.) impacts. In order for an intervention to achieve impact beyond program participants, its effects need to be observed **over a longer period of time** (3 to 5 years)" (p. 21).

1.4.2 Who is your audience? Who will participate? Who benefits?

As for any evaluation, it's important that the initial phase of a formative evaluation involves identifying the program's participants and stakeholders. Who will be involved in the intervention? Who stands to benefit from the program? Identifying the target audience means not only pinpointing potential beneficiaries but also considering their characteristics and beginning to define their needs.

Example of Identifying a Target Audience

Mentoring of younger researchers has a large focus on SDU, where the work of career support is prioritised highly. To improve the well-being and development of young researchers, the Faculty of Health Sciences at the University of Southern Denmark, decided to develop and offer a Mentoring for Change programme at Faculty level from autumn 2024 aimed at all PhD students enrolled at the faculty, as well as selected postdocs and assistant professors. The mentors are found among senior researchers at the faculty The programme was developed and now implemented by SDU's Gender Equality Team (GET) in collaboration with key actors from the faculty.

The Mentoring for Change programme is designed as a group course, where one mentor is responsible for a group of 4-5 mentees. The idea of a mentoring programme being a group mentoring programme is two-fold:

First it can be hard and lonely to be a young budding researcher and for many, it will make a difference to have someone to lean on. With the support of mentors, mentees can share experiences in small confidential groups, form networks and reap learning and support from each other. The group thus provide support for early career researchers in their professional development and well-being.

Second, a mentor can easier identify patterns of obstacles and barriers that may be of a systemic nature, relevant for the organisation, with a group of mentees rather than just having one mentee at a time.

The programme has an inclusive gender approach and targets both men and women. The programme is a strategic goal in SDU's GEP.

"We want to be a faculty that takes care of the individual's career development and well-being as a researcher. We connect young researchers with more experienced researchers and create smaller and confidential networks that can be maintained throughout the research education and career", says Dean Ole Skøtt.

The evaluation is of interest to the Faculty Management and Heads of Departments, the faculty gender equality committee, the PhD school and PhD supervisors at the faculty. Moreover, the evaluation can be of interest to other faculties at the university considering developing and implementing a mentoring programme. The evaluation will also be of interest to human resources. At the same time, it might be of interest to other Danish universities and private companies related to the Danish healthcare system and the medical industry.

1.4.3 Goals: What does the activity aim to achieve?

Referring back to the log-frame model (see page 22), the goals of an intervention define what it aims to achieve for participants and beyond. These goals can be concrete or abstract, but it is important to make them SMART—Specific, Measurable, Achievable, Relevant, and Time-specific—to keep them clear and focused.

Using SMART criteria helps to refine goals effectively. As explained by Yemm (2012):

- **Specific:** Define exactly what needs to be done using clear, positive action verbs. Ask: What is the task? What result is expected? Why is it important? Who is responsible? What constraints exist?
- **Measurable:** Make sure progress can be tracked, whether quantitatively or through clear behavioural evidence. Ask: How will you know the objective is achieved?
- **Achievable:** Set goals that are challenging yet realistic within the available time and resources. Ask: Is this within my control? Can it be done with current resources?
- **Relevant:** Ensure objectives align with individual roles and overall organisational aims, and that they support rather than conflict with each other.
- **Time-specific:** Set clear deadlines to create focus and urgency. Ask: When will this be completed?

Outcomes are the immediate effects on participants, such as changes in attitudes, knowledge, skills, motivation, or behaviour, usually seen within a short to medium timeframe (up to 2 years).

Impact refers to longer-term changes beyond the direct participants, affecting broader areas like economic competitiveness, social equality, or innovation, typically over 3 to 5 years or more.

Applying these principles helps create clear, actionable goals that guide effective evaluation and meaningful organisational change.

Example: Mentoring for Change's Goals & Objectives

A set of over-arching goals for the Mentoring for Change program was defined with inspiration from Dr. Jennifer de Vries' bifocal approach to mentoring (de Vries and van den Brink 2016):

- Supporting and furthering the younger researcher's individual career development, as well as their understanding of and navigation in academic (power) structures
- Strengthening the mentors' own development through mentoring younger colleagues, as well as organisational understanding and empathy
- Identifying organisational structures helping and hindering career development

GET and key actors from the faculty developed and defined the below short- and medium-range outcomes of the mentoring activities:

Short-term outcomes: Discover and specify mentees' career wishes and –plans. A confidential network of peers. Improve efficiency of task prioritising tasks and time management. Contribute to participants' ability to choose, prioritise, transform, and mutually support each other's career paths. Building mentees' individual work-life balance, and job satisfaction.
Together, mentor and mentees will identify structural barriers and reflect on their own daily practice, not least from a gender equality perspective. Enable mentees and mentors to reflect critically-constructively on academic (power) structures and –dynamics. Increased satisfaction and intrinsic motivation for mentors by way of doing 'good deeds' for a young researcher.

Medium-range outcomes: Branding the Faculty of Health Sciences as a place that takes care of the individual's career development and well-being of younger researcher. Creating network and stronger attachment to the departments and research groups, enhancing strategic deciphering of academia as work sphere, and of research as a career choice. For SDU and the Faculty of Health Sciences to better attract and retain younger researchers. Enhanced awareness of gendered issues in research career progression. Contribute to mentees' ability to prioritise, choose, transform, change, and to mutually support one another in relation to career options and paths and. Mentors and mentees will - through the two-way relationship - retain the ability to act as 'partners for change'. Mentees will hopefully navigate career strategies more securely, continuously well-informed and in accordance with individual competencies and wishes.

Further, the intended longer-term changes affected by the mentoring program were specified:

Long-term impact: The long-term impact of the Mentoring for Change program can be transformative, benefiting younger researchers, the faculty, SDU, and society as the mentoring provides support and guidance, reducing attrition rates, especially for underrepresented groups in challenging fields. Mentees gain confidence, interpersonal, and problem-solving skills and networking opportunities. Mentors also grow by enhancing their leadership, communication, and coaching abilities and refine their ability to guide, motivate, and inspire the younger researchers in the mentor groups. Exposure to different experiences and viewpoints enriches personal and professional growth for both mentees and mentors. The Mentoring for Change will also raise awareness on gendered structures at SDU and in academia more widely. Further, it will contribute to changing of organisational structures and culture and uplift the working climate by increased knowledge-sharing, collegial support and mentor group facilitations. Over time, mentoring can normalise inclusion, collaboration, and continuous learning within organisations and industries.

1.4.4 Activities: What to do?

According to the log-frame (2021), the activities necessary to achieve the program goals must be detailed. Participants are expected to engage in one or more exercises over an extended period. To organise these activities effectively, the design evaluation should assess the necessary "inputs" and the anticipated "outputs".

Input refers to the resources needed to implement an activity. Inputs are usually subdivided into:

a) time - how long will it take to carry out the activity? For example, 2 three-hour workshops + 2 working days for preparation of the workshop, 1 working day for analysing evaluation results.
b) human - how many persons are needed to carry out an activity? For example, 1 expert trainer and 2 volunteer facilitators
c) financial - budget. For example, travel costs for participants or speaker fees.
d) material - rooms, consumables, pens, charts, etc.

Planned activities need to be realistic in terms of the required investment (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 23).

Outputs of an activity refers to simple numeric indicators that capture the characteristics of the activity. To continue with the above example, this could simply refer to the number of mentors-mentee meetings carried out.

Activities

To achieve the planned goals of the Mentoring for Change programme, SDUs Gender Equality Team (developed, in collaboration with one of the Heads of Department and a vice-Head of Department from the Faculty of Health Sciences), the structure of the mentoring programme. The faculty Gender Equality Committee is the Steering Group.

Each cycle of the program is one year long.

The main activity consists of six mentor group meetings of two hours and three all-day seminars facilitated by the Gender Equality Team. Topics discussed include the career plan, networking, publication strategy, negotiation, networking, work-life balance, and other topics defined discussed in the groups. Moreover, the Gender Equality Team meets with the mentor group three times to check-in.

Mentors are rewarded for their meeting time as regular supervision. The faculty supports the Gender Equality Team with administrative support. Each running program has up to 40.000 DKK (which is around 5360 euro) allocated from the faculty to cover the costs of invited speakers, catering etc. Feedback on identified hindering factors/barriers is given at the end of the programme by GET to the faculty management group and the steering committee.

1.4.5 Facilitating & Hindering Contextual Factors

When assessing the design of an intervention, it's crucial to consider the broader context in which it takes place. Interventions don't happen in isolation—they are influenced by the organisational and national environment, which can affect how they're implemented and their overall impact (Sangiuliano, Cresco, Palmén & Müller et al., 2021).

Four key contextual factors should be taken into consideration:

- **Organisational context:** The culture, climate, strategic plans, and goals of the organisation shape how open it is to equality interventions.
- **Policy context:** The legal and policy framework—at EU, national, or regional levels—can support or limit the intervention. This includes equality, diversity, and R&D policies.
- **History/past interventions:** Previous similar efforts can influence outcomes—there might be participant fatigue or opportunities for synergy based on past successes or challenges.
- **Collaborations:** Networks and partnerships within the research and innovation ecosystem can either support or compete with the intervention, affecting its success.

Considering these factors ensures a more accurate and realistic evaluation of the intervention's design and potential effectiveness.

Why INSPIREs facilitating and hindering factors?

While previous research projects and reports have worked to describe the issues and barriers around gender inequality in R&I (e.g., She figures), including the main causes, main policy measures used to address inequality, and the main organisational "impact drivers" to facilitate change, there is currently little to no research on the role of context and interplay between national and organisational level policies as well as the configurations and interactions of measures and drivers. INSPIREs research has been working to fill this knowledge gap and to capture the facilitating and hindering factors for GEP Impact. These factors are essential to sustaining and deepening change, and they help to illuminate how stakeholders and organisations define and understand GEP success, failure and impact, and importantly, which factors exactly facilitate or hinder the success of organisational interventions and thus organisational change.

In INSPIRE's research case studies, our research team distilled the different configurations of 6 main factors for impact/change.

They are:

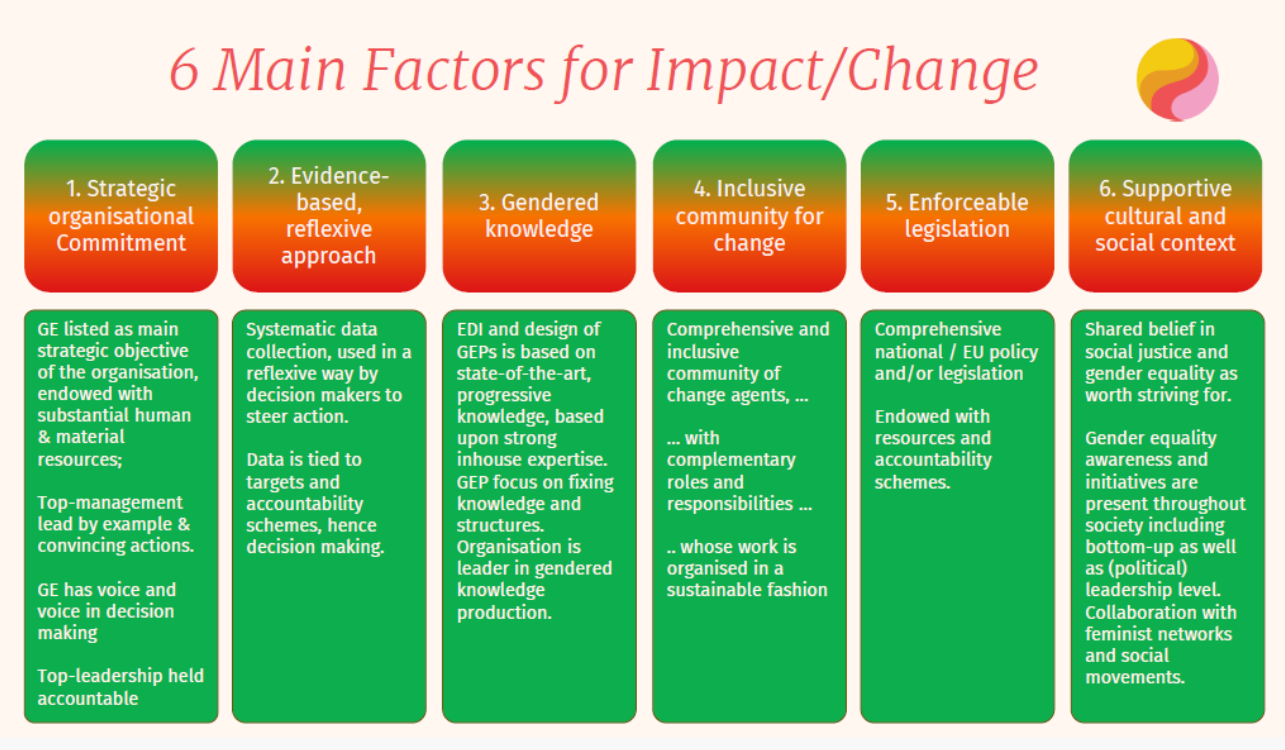


Figure 2: 6 Main Factors for Impact/Change (Müller, J. INSPIRE Co-Creation Workshop 2, 2024)

Example of Facilitating and hindering factors

The success of the Mentoring for Change programme depends on various facilitating and hindering factors.

Policy context: The Act on Equal Treatment, the Act on Equal Pay for Men and Women, and the Act on Entitlement to Leave and Benefits in the Event of Childbirth states that any kind of discrimination on the Danish labour market is prohibited. However, in general, structural gender biases are often overlooked or neglected in Denmark, because the common perception is that men and women are equal and have equal opportunities in Denmark. Simultaneously government, public and private organisations all encourage everybody to prevent discrimination and strive to achieve GE.

Organisational context: Organisational facilitating factors can be an active endorsement from the faculty management, which enhances credibility, encourages participation, and secures resources. It has turned out to be a very important facilitating factor in the rollout of the mentoring program to have good collaboration and professional support from HR regarding the administrative tasks connected to recruitment, meeting bookings, etc. Moreover, acknowledging mentors encourages participation and commitment also plays a role in their willingness to facilitate mentor groups - if mentoring contributions go unnoticed, potential mentors may not be motivated to participate.

History / previous interventions: At SDU, a mentor programme for younger researchers was offered by HR in the 2010s, but due to a lack of resources it was cancelled. Now the initiative of mentor programmes is taken care of at faculty level for now. Hence, the Faculty of Health Sciences is now responsible for the development of the current mentoring for Change programme.

Collaborations: In the Danish network for GE practitioners IDEA (Inclusion, Diversity and Equity in Academia) members from the different Danish universities brainstorm and share experiences with different set-ups for mentoring programmes.

1.4.6 Methods & Instruments

The range of research methods needed to assess the design of an intervention is relatively limited and most of the necessary information can be obtained through desktop research. Indeed, this information can be easily accessible when the analysis is part of a formative evaluation conducted by a Gender Equality working group, whose members have been involved in the intervention's conceptualisation (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 19).

Evaluation Building Block	Methods	Sources
Context Factors (policy, organisational, historical, key factors)	Document analysis (see e.g., Bowen 2009)	Organisational websites, reports, strategic plans
	Comparative research (see e.g., Mills, van de Bunt, and de Bruijn 2006)	
	Descriptive research, e.g., systematic or scoping reviews (see e.g., Munn et al. 1018)	Official statistics, secondary data sources
Tested assumptions and empirical evidence	Literature research, e.g., systematic or scoping reviews (see e.g., Munn et al. 2018)	Scientific literature, academic search engines, subject relevant archives, committees, organisations (GenPORT, EIGE, National Academy of Sciences, etc.)
Overall design of interventions (goals, audience, activities, targets)	Semi-structured interviews (Casillas et al. 2020; Bryman 2008)	Member of intervention planning group, key institutional stakeholders including decision makers
	Focus group (Casillas et al. 2020; Bryman 2008)	Member(s) of the intervention planning group

Table 1: Evaluation research methods (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 26)

1.5 Implementation Analysis

The main purpose of formative evaluation is to guide the implementation of GEP activities and initiatives (p. 28). To do this effectively, monitoring indicators must be developed to track progress and identify any issues early on. Implementation analysis compares what was planned with what actually happens, helping to spot delays or resistance, which is natural in any change process.

Monitoring data is essential to understand whether problems come from poor design or weak execution (Rogers et al., 2015, cited in Sangiuliano, Cresco, Palmén & Müller et al., 2021). This evaluation framework supports organisations in creating their own self-assessment systems, including monitoring tools, to regularly review and adjust the integration of the GEP within their structures.

The implementation analysis focuses on several key questions:

- Which actions have been carried out? This compares actual activities to the original plan.
- Who are the key actors? Mapping roles helps understand responsibility and decision-making.
- What organisational processes are involved? Since decisions and responsibilities are spread across departments and units, this is critical-especially as changing processes is often a key goal of the GEP.
- How has the intervention changed compared to the original goals, activities, and targets?

These elements form the core of a thorough implementation analysis.

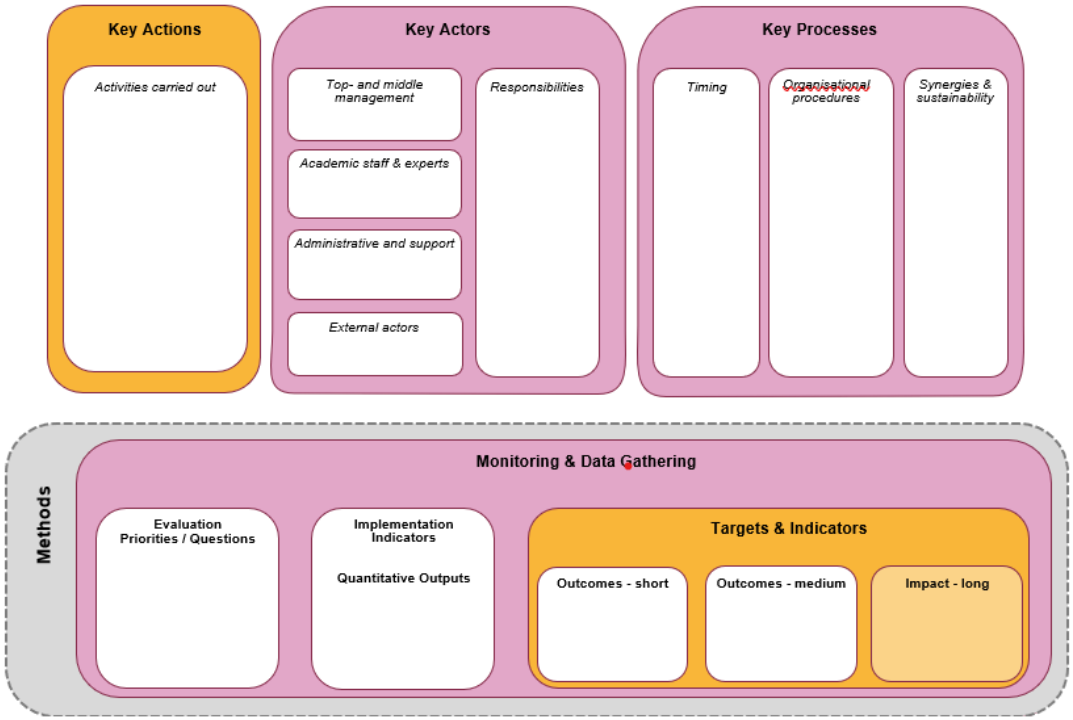


Figure 3: Template for monitoring of implementation process (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 29)

1.5.1 Key Actions

When defining key actions, it is important that at a general level, the implementation analysis must monitor the type and number of actions carried out. During the design phase of the GEP, a list of activities should be outlined to achieve the specified objectives, which might include training seminars, revisions of recruitment procedures, the formation of working groups, and more.

1.5.2 Key Actors

When identifying key actors or stakeholders, gender equality interventions often involve many people beyond the main beneficiaries. As more individuals get involved, managing the process becomes more complex, requiring clear coordination and task distribution. It is important to map key actors and their responsibilities to ensure tasks are well-distributed, redundancies exist to prevent bottlenecks, and decision-makers are engaged to support effective implementation. The analysis should address these questions:

- Who is involved in the implementation? How would the absence of any key person affect progress?
- What are the roles and competencies of each actor?
- Are the necessary decision-makers actively involved?

Example: Key Actors of a Practice-based GEP activity

The Mentoring for Change programme at the Faculty of Health Sciences was set up by SDU's gender Equality Team and Head of Department and Vice Head of Department from the Department of Regional Health Research. The administrative coordinator of the programme at the faculty is coordinating the recruitment of mentees with the PhD school. The recruitment of mentors was done by the eight Heads of Department at the Faculty based on a request from the administrative coordinator of the programme at the faculty.

The Gender Equality Team GET is responsible for the planning and facilitation of the seminars and to introduce and check-in with the mentor on a regular basis during the programme.

A steering group was formed of members from the Faculty Equality Committee. The faculty management and Steering group is part of the annual evaluation meeting conducted by SDU's Gender Equality Team.

A strong enabling factor is the genuine interest and engagement of the Head and Vice Head of the Department of Reginal Health Research and in general the Faculty Management group. A barrier during the pilot run of the project was the mixed roles of the mentors: a Head and Vice Head of Department each took on the mentor role for their respective mentor group. This created a certain 'filter' for what the mentees would be comfortable talking about in the mentor groups. Thus, it was decided for future runs of the program to recruit the mentors from the academic level just above the mentees, i.e., assistant professor and associate professor levels.

1.5.3 Key Processes

Building on the key actors identified earlier, the analysis should focus on decision-making structures, hierarchies, and responsibilities by addressing these questions:

- **Organisational processes:** How is implementation organised? Is there a dedicated working group meeting regularly? How are decisions made? Are key organisational bodies involved and aware of necessary procedures?
- **Timing of tasks:** Was the schedule realistic? For interconnected tasks, is there enough flexibility to handle delays? Does the timing account for internal administrative processes?
- **Synergies and sustainability:** Can the intervention leverage existing or past related activities? How do these influence current implementation? (Sangiuliano, Cresco, Palmén & Müller et al., 2021, 30-31).

Example: Key processes

A working group consisting of SDUs Gender Equality Team and the Head and vice Head of the Department of regional Health research was established, and they met on a regular basis throughout the development of the programme.

The Faculty Gender Equality Committee and the Faculty Management Board gave their feedback, and the board initially approved the programme. A virtual Teams Site was set up for sharing documents.

At SDU level, several activities complement the Mentoring for Change Program in terms of competency development courses, Research Academy and other career-building activities

1.5.4 Evaluation Priorities and Questions

The main evaluation priority for implementation is to assess deviations, obstacles, or challenges that arise during the process. The focus is on how effectively the intervention is being implemented. Key questions include:

- To what extent does the implementation deviate from the original plan? Has it changed or been adapted? This applies to any aspect of the design: audience, goals, activities, desired outcomes, or expected impact.
- What barriers or obstacles have been encountered during implementation? Have these been overcome?
- What factors have inhibited or facilitated the process?

Specific priorities and questions depend on the individual action being implemented and should be developed in tandem with capacity-building activities.

1.5.5 Methods – Overview

Evaluation Building Blocks		Methods	Sources
Evaluation Priorities/Questions	Questions regarding key actors, key processes. Changes over time, facilitating and hindering factors.	Focus Group, Semi-structure interviews	Stakeholders involved in implementation; not members of GE working group
Targets & Indicators	Output (direct services, products or events produced by activities)	Documentation	Intervention organizers.
	Outcome – Short-term (Post-test, pretest-post-test, etc.)	Polls, questionnaires, organisational statistics and indicators	Beneficiaries, participants
	Outcome – medium-term (Time-series)	Polls, questionnaires, interviews, organisational statistics and indicators	Beneficiaries, participants

Table 2: Main building blocks of the implementation analysis (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 32)

1.6 Summative Evaluation Methodology

Summative evaluation aims to determine whether an intervention achieved its intended outcomes. It provides a clear framework for gathering evidence to assess how well an GEP worked and how external factors influenced its results. Building on insights from the formative evaluation—which reviews design and implementation—the summative evaluation measures outputs, outcomes, and overall impact using qualitative and quantitative methods like interviews, focus groups, and surveys.

Evaluating GEP outcomes is complex because it's hard to isolate the effects of the intervention from wider social, political, or policy influences. This complexity grows when GEPs interact with external factors beyond the institution. Therefore, a thorough, context-sensitive approach is essential. Sangiuliano, Cresco, Palmén & Müller (2021) emphasise assessing "contribution" rather than strict causality with a focus on "attribution". Instead of claiming GEP actions alone caused change, the evaluation examines how specific actions, actors, and contexts together influenced the organisation.

Structural change toward gender equality is nonlinear and often slow, with a delay between intervention and visible results. To capture meaningful impact, data must be collected over time, using methods tailored to each GEP's specific goals and measures, ensuring an accurate evaluation of progress and outcomes.

1.7 Assessment of GEP outcomes and impact

Assessing the outcomes and impacts of the implementation of an GEP is important and builds on a formative evaluation, where you can e.g.,

- compare the design analysis (log frame) to the observed outcomes and impacts
- [...] explain how (or how not) certain outcomes and impacts have been achieved (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 41).

1.7.1 Target Audience

Each RPO/RFO has its own target audience includes a range of relevant stakeholders and key players. Each specific intervention in an GEP can have different target audiences that might vary depending on the institution, but some might include:

Top-management

- Rectors and Vice Rectors
- Institutional Heads
- Director General/ Board

Middle management

- Human Resource Managers
- Deans
- Faculty heads
- Programme Managers
- Information Systems Managers

Staff

- Researchers
- Academics
- Administrators
- Technicians
- Gender Equality Officers
- Communications staff

Students

Other decision-making bodies such as the workers' council, trade- or student unions.

1.7.2 Evaluation priorities

The Evaluation Methodology outlines that the summative evaluation of the GEP, focusing on its outputs, outcomes, and impacts at the institutional level, is guided by the following key priorities:

Evaluate the extent to which implementing institutions have fostered institutional change by

- Assessing the extent to which expected outcomes and impacts have been achieved
- Identifying the main outputs, outcomes and impacts of the GEPs

- Assessing the extent to which awareness of gender issues and institutional actions/ policies has been raised
- Assessing the extent to which the scope of the GEP has expanded to other institutions/ departments within the organisation" (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 44).

1.7.3 Methods and instruments

The CALIPER Evaluation Methodology indicates that the summative evaluation of the GEP should concentrate on objective and measurable outcomes and impacts, rather than relying on potentially biased perceptions of positive impact from actively involved stakeholders. This evaluation can be informed by the formative evaluation, along with interviews and/or questionnaires. Additionally, the GEAM tool can be a valuable resource in this process.

Summative Evaluation Template – questions

Impact Assessment
What are the main outputs of the GEP that can be observed? Do these coincide with the expected outputs? How are these measured?
What are the main outcomes (per target group) that can be observed? Do these coincide with the expected outcomes? How are these measured?
What (type of) main impacts (indirect/ direct, intended/ unintended) of the intervention can be observed? Do these coincide with expected impacts? How are these measured? How sustainable are these impacts?
To what extent has the intervention becomes embedded into institutional routine/ regulations/ processes?
To what extent is there an increased awareness of gender issues and institutional actions for gender equality?
To what extent has the scope of the GEP expanded to other institutions/ departments within the organisation?
What are the main factors that have hindered/ supported the impacts of the intervention?

Table 3: Summative Evaluation Template – Questions (Sangiuliano, Cresco, Palmén & Müller et al. 2021, 32)

Bundled tools and resources – monitoring and evaluation

Resource Name	Link to the Resource	Description
INSPIRE: GEAM tool_v3	https://inspire.europame-dia.org/e-learning/chap-ter/52/otu2-geam-v3-setup	INSPIRE training unit, which provides guidance on setting up and launching a GEAM survey, based upon our empirical research on GEP impact fac-tors.
INSPIRE: OTU4	https://inspire.europame-dia.org/e-learning/chap-ter/58/otu4-inclusive-data-monitoring	INSPIRE training unit on inclusive data monitoring and indicator development.
INSPIRE: Literature Review Data Monitoring	https://zenodo.org/rec-ords/10033668	The report gives an overview of the literature on monitoring Gender Equality Plans (GEPs) in Re-search Performing Organisations (RPOs). The re-port displays information about monitoring GEPs and how GEPs can include an understanding of in-clusive gender equality.
Caliper: Evalu-ation Method-ology	https://zenodo.org/records/ 10433525	This text includes the methodology for evaluating the GEPs designed and implemented within the CALIPER project. It is composed by two main parts: the methodology for a “formative evaluation” and the one for a “summative evaluation”.
SPEAR: Moni-toring in Gen-der Equality Work	https://gender-spear.com/multimedia	This podcast is an interview with Florian Holzinger - an expert on data analysis. The interview walks you through the main steps of data monitoring ap-plied to the gender equality sphere.
GEARING ROLES: Guidelines for GEP Design Evaluation	https://zenodo.org/rec-ords/7736108	Guidelines for Design Evaluation.
TARGET: Gender equal-ity monitoring tool and guide-lines for self-assessment	https://www.gendertar-get.eu/wp-content/up-loads/2022/08/D4.1-Monitor-ing-tool.pdf	The tool provides concrete guidance on monitoring and self-assessment. The text differentiates where relevant between universities, research performing organisations and research funding organisations.

Resource Name	Link to the Resource	Description
GENOVATE: Guidelines for evaluating gender equality action plans	https://www.researchgate.net/publication/326226367_Evaluating_Gender_Structural_Change_Guidelines_for_Evaluating_Gender_Equality_Action_Plans_2O16	The guidelines include inputs from the evaluation literature and guide you through the steps of an evaluation process.
FESTA:Towards Raising Organisational Awareness	https://eige.europa.eu/sites/default/files/festa_toolkit_towards_raising_organizational_awareness.pdf	A thorough guide on quantitative indicators and methodology
EFFORTI toolbox	https://efforti.org/efforti-toolbox-intro	The toolbox provides a framework for a wide range of stakeholders – ministries, funding agencies, programme owners, equality officers, etc. – to conduct a sound and comprehensive evaluation of gender equality, but also research and innovation outputs, outcomes and impacts of gender equality measures.
EQUAL-IST: Assessment methodology and indicators	file:///C:/Users/baisner/Downloads/EQUAL-IST_D4.1_Assessment_methodology_and_indicators-v05%20(1).pdf	A report based on the experiences of monitoring and evaluating GEPs in seven research-performing organisations. The report presents the assessment methodology and indicators used in the monitoring process and provides a monitoring template plan.
GENERA PAM Tool	https://www.genera-network.eu/pam:pam	The PAM Tool can be used to find measures, indicators and targets for Gender Equality Plan and is a tool for monitoring as well as for guiding actions for more gender equality in physics.
PLOTINA: Monitoring tool	https://www.plotina.eu/monitoring-tool/	A monitoring tool based on 10 core indicators and 40 specific indicators, which can be selected based on the focus of your GEP.
The Equality Fund	https://equalityfund.ca/wp-content/uploads/2021/09/Feminist-MEL-Research-Overview-Paper-FINAL-1.pdf	Feminist approaches to monitoring, evaluation and learning (MEL)

2. Intersectionality

2.1 Why intersectionality in Sustaining and Deepening Change

Taking on an intersectional approach in diversity, equality and inclusion work is essential for sustaining and deepening change. Intersectionality is a framework, tool, or method (Carbado et al 2013) that can exactly help to understand how interlocking systems of discrimination function and exacerbate each other, especially in the capitalist, neoliberal University (Salem 2016; Chaves & Benschop 2023) where job precarity, time-limited contracts, and competitiveness dominate (Guschke, Just & Muhr 2022; Guschke 2023).

Before delving further into this topic, we want to first lay out our conceptual frame around intersectionality and how INSPIRE works with the concept. INSPIRE understands intersectionality as a concept that aims at "exposing the interlocking systems of oppression and privilege that exist not only on the individual and interpersonal level, but also on the level of systemic processes and social structures that focus on how classism, ableism, racism (not race), heterosexism, and cisgenderism are interlocked and how these and other systems of sameness and difference relate to power, and mutually reinforce each other" (Palmén et al. 2023, 6). For a deeper conceptual discussion of intersectionality aimed at CoP work, we refer readers to e.g., ACT's booklet on intersectionality (2021). For a quick overview of intersectionality with figures and illustrations, see e.g., the Canadian Research Institute for the Advancement of Women's Feminist Intersectionality Primer (2021).

2.2 The "I's" in EU's IGEPs: Understanding and Working with Intersectionality and Inclusion

Taking an intersectional approach in designing, engaging with, and doing diversity, equality and inclusion work is essential if one is to work towards making academia more inclusive and more just. Intersectionality and inclusivity are connected and complementary, as both help to push GEPs and GE work to be more representative of many different perspectives and different identities (Chaves & Benschop 2023, p. 9-10). They both help to give a framework that shifts the primary focus of gender equality from more privileged social groups in feminism (e.g., white, cis-straight, upper class, Western women), who have been critiqued as being those whose voices have historically been centred in feminist movements, and who when pursuing the issues that matter most to them, sometimes perpetuate and uphold racist, classist or queerphobic structures in academia (see e.g., Ahmed 2012; Calafell 2012).

Intersectionality in particular pays attention to questions about power, questions about reflexivity and positionality, and thus questions about inclusivity within feminist and GE coalitions. In asking these questions both at individual, interpersonal and structural levels, an intersectional approach asks for a systematic inclusion of the most marginalised. This shift towards asking for *inclusive* GE work in feminism is mirrored in the newest articulation of the EU's guidelines on working with GEPs, as the EU too is now pushing IGEPS, *inclusive* GEPs while simultaneously also encouraging employing an intersectional perspective.

Inclusion and intersectionality are distinct and separate concepts and thus it's important to understand the differences between them. INSPIRE understands "inclusion" "primarily as a participatory, transformatory process guided by non-negotiable core values such as feminism, care, social and epistemic justice, fairness, equality, solidarity, decolonialism, and democratic participation" (Palmén et al. 2023, 22). In practice, both inclusion and intersectionality aim to reduce inequities, but inclusion doesn't always address the nuanced, multi-faceted, and layered experiences that intersectionality highlights (Chaves & Benschop 2023, p. 9-10). While inclusion addresses the prospective and generalizable dimension of equality —namely, the ways in which social realities can be transformed to foster greater equality— intersectionality engages the descriptive and situated dimension, examining how power relations unfold in particular contexts and historical moments. In this sense, intersectionality constitutes the very condition of possibility for inclusion. It is important to understand the common aims but also the differences between intersectionality and inclusiveness in order to really start to design and implement intersectional IGEPs.

A BASIC CONCEPTUAL UNDERSTANDING: WHAT IS INCLUSION & INTERSECTIONALITY?

1. **Inclusion** refers to the practice of creating environments where all people feel valued, respected, and able to fully participate, regardless of their differences. It focuses on ensuring that diverse groups—based on race, gender, disability, sexual orientation, and other characteristics—are welcomed and provided equal opportunities to engage and thrive. Inclusion is about access, equity, and participation in various spaces, like workplaces, educational institutions, or communities.
2. **Intersectionality**, on the other hand, is a framework, method or tool for understanding how different aspects of a person's identity (such as race, class, gender identity, sexuality, ability, etc.) intersect and interact to shape their experiences of privilege and oppression. It addresses how people experience multiple, inextricable forms of discrimination or marginalisation, which cannot be understood fully if these identities are considered in isolated silos. For example, a Black woman may face both racism and sexism, but those experiences are not simply the sum of "racism" and "sexism"—they are intertwined in unique and complex ways that influence her life in specific ways.

Example:

- **Focus**: A prototypical example in the field of labour relations is that of a Black woman who is denied employment as factory staff in a company that employs white women in administrative (white-collar) positions and Black men as factory (blue-collar) workers. If we examine sex and race separately, one might conclude that the company has not engaged in discrimination on either ground, since it hires women and it hires Black individuals. However, the Black woman occupies a distinct position from both Black men and white women, and it is precisely this intersectional identity that underlies her exclusion. Stereotypes associated with physical labour prevent her from accessing factory positions, while educational gaps linked to racial inequality hinder her entry into administrative roles (Lousada-Arochena, 2023: 18-19).

2.3 Working with intersectionality and inclusion in IGEPs

After reflecting on intersectionality and positionality in GEP work, we now turn to how these principles can be applied in practice. INSPIRE's Support Package 2 outlines nine key principles for designing and implementing Inclusive Gender Equality Plans (IGEPs). These principles also offer practical guidance on embedding intersectionality to support lasting change:

1. **Participatory Processes (Inclusion):** Developing IGEP should be done through participatory processes involving diverse organisational stakeholders. It is crucial to engage decision-makers, implementers, and key target groups (staff, students, customers) in the planning and implementation phases.
2. **Intersectionality:** IGEP should apply an intersectionality framework supported by clearly defined structural actions and objectives at policy and organisational levels. Mainstreaming gender equality through actions should be focused on specific social characteristics.
3. **Data-Driven Approach:** IGEP must be grounded in data, utilizing both quantitative and qualitative measures. It should monitor career progression, decision-making bodies, leadership positions, research projects, teaching content, gender-based violence and sexual harassment. Data collection should include validated measures of gender, race, ethnicity, ability, age, sexual orientation, and other relevant markers of discrimination.
4. **Context-Specific Design**: IGEP should be designed to be context-specific, aligning with national-level policies. It should incorporate an epistemic justice lens to address gendered power relationships and drive long-term changes. It should take advantage of Communities of Practice (CoPs) and/or networks to support change agents and interventions. In order to encourage innovative solutions rooted in specific local histories and contexts, it should aim at understanding local and contextual mechanisms.
5. **Learning from Experience and Locally Situated Knowledge:** IGEP should be built on lessons learned from advancing gender equality while addressing specific patterns of discrimination and inequality experienced by marginalised groups. IGEP should emphasise the creation of sustainable, long-term impact by integrating locally situated knowledge into the design and implementation of GEPs. This approach encompasses drawing insights from practical encounters, past efforts, and the unique perspectives found in specific geographical, cultural, and social settings.
6. **Resource Allocation:** Financial and human resources for the development and implementation of IGEP should be allocated. Those include for instance resources for training, competence building, and sustaining networks for collective action. It is also advisable to incorporate gender budgeting in IGEP.
7. **Gender and Intersectionality Competence and Knowledge:** IGEP should address the importance of gender competence and knowledge within organisations. It is crucial to draw on local knowledge from within an organisation and from the other experienced organisations of similar background or context. Other strategies include providing training, engaging in gender equality networks, and commissioning gender expertise.
8. **Clear Terms, Actions and Accountability:** IGEP should use clear terms for sex, gender, and other protected characteristics based on national legislation. They should clearly

articulate actions, timeframes, responsibilities and emphasise transparency, monitoring, evaluation, and accountability.

9. **Organisational Strategies:** IGEP should ensure organisational safety and inclusivity for work and/or study. It requires setting specific organisational objectives and actions. It is recommended to highlight the positive value of diversity through awareness campaigns, training, codes of conduct, and anti-harassment policies. "(Ciaputa et al. 2024, 11-12).

These nine principles highlight both the interconnectedness and the necessity of intersectionality and inclusion in praxis.

To better understand how intersectionality can be used in GEP work, please see the following resources: A Video and Booklet on Intersectionality as developed by the ACT project; GE Academy webinars: Intersectionality in institutional change processes in academic organisations, and Applying intersectional perspectives in research and innovation. The cases of urban cycling and artificial intelligence; Factsheet issued by the European Commission on gendered innovations that offers a comprehensive overview explaining the significance of integrating a sex, gender, and intersectional analysis into Research and Innovation (R & I)." (Ciaputa et al. 2024, 18).

In addition, when working specifically with GBV, UniSAFE's toolkit helps professionals to be more inclusive and intersectional in their approach to and handling of GBV. For example, the toolkit reflects on how professionals should approach different groups differently, reflecting specifically on how questions should be "sensitive to a spectrum of possibilities (e.g. LGBTQIA+ identities, religious norms or beliefs, earlier traumas, etc.)" (2024, 65).

2.4 Importance of Reflexivity, Positionality and Addressing Privilege in Intersectional work

One implicit point that's highly crucial to understand when working with many of the 9 principles outlined above in IGEP work is reflexivity, positionality and privilege, which can be especially important when working with 1) Participatory Processes (inclusion), 2) Intersectionality, 5) Learning from experience and locally situated knowledges, 7) Gender and Intersectionality Competence and Knowledge, 8) Clear Terms, Actions and Accountability and 9) Organizational strategies.

Reflecting upon positionality has been a methodological and ethical imperative in much of feminist research since feminist scholars began critiquing objectivity in science—scientists viewing subjects from a "view from above, from nowhere" (Haraway 1988), claiming a neutral, objective position while in fact occupying a very specific subject position (male, white, heterosexual, etc.). Feminist epistemologies since the 1980s, including some of the first intersectional feminist scholars in Black feminism, have instead asked how power and privilege shape the research process and its outputs, insisting on transparent, reflexive discussions of power and privilege when addressing what we know and how we know it. This has fostered feminist participatory action research methods (see, e.g., Lykes & Hershberg for an overview of FPAR; Lopez et al. 2020 for Chicana FPAR fostering Latina resilience in HE; Singh, Richmond & Burnes 2013 for FPAR with trans communities).

It is important to state that positionality is not an act of ontological authority; in other words, it is not a claim to authority over an embodied identity (i.e. I *am* therefore I have the authority to speak about this topic or identity marker). INSPIRE's approach to intersectionality highlights this by acknowledging that understanding privilege is as critical as understanding oppression. Reflecting on one's own positionality - how factors like race, gender, class, and other identities shape one's experiences and access to power - can reveal biases and blind spots that affect how gender equality initiatives are framed, implemented, and evaluated (Daly et al. 2023).

Positionality invites critical reflection on questions such as:

- Who is *defining* the frame and scope of initiatives—existing and future?
- Who is *involved* in creating, implementing, monitoring and evaluating GEP work?
- Who *benefits* from the work taking place?

2.4.1 Reflexivity and Positionality in IGEPs: Towards more transparent equality work

Guidance on the Role of Positionality in GEP and EDI Work

Why it matters:

Incorporating insights from feminist research, it's important to reflect on *positionality*—which means understanding how your personal background, social identity, and level of privilege affect your views and actions.

What is positionality?

It's the recognition that your identities and life experiences—based on things like gender, race, class, sexuality, ability, and cultural background—shape how you understand issues like equality and inclusion. It also impacts how others perceive you in your role.

How to put it into practice

1. Encourage Reflection Among Leadership
   - Ask those with influence over GEP (Gender Equality Plans) to think about their own privileges and how these may affect decisions and priorities.
   - This reflection promotes transparency and helps build more inclusive teams and strategies.
2. Listen and Look Inward
   - Meaningful inclusion isn't just listening to marginalised voices. It also involves examining your own behaviour and role in perpetuating inequalities.
   - Encourage leaders and staff to ask: How might my approach unintentionally contribute to exclusion?
3. Create Trust Through Honesty
   - Acknowledging your own social location can help foster trust and authenticity in EDI efforts.
   - When people see that others are willing to reflect openly, it builds credibility and stronger relationships.
4. Tailor Policies to Real Needs
   - Avoid one-size-fits-all policies. Reflection ensures that initiatives respond to diverse communities' actual experiences.

- This reduces harm and makes outcomes more equitable.

5. Strengthen Knowledge Sharing
   - Recognising who holds power—and who doesn't—helps make conversations more inclusive.
   - It also ensures that knowledge sharing is guided by principles of fairness and justice.

A Note on Privilege

- Encouraging people to reflect on how privilege (e.g., being White, straight, cis-gender, wealthy, able-bodied, or neurotypical) shields them from discrimination can build empathy and understanding.
- This helps dismantle systemic barriers and fosters more thoughtful, reflexive EDI work.

What Positionality Enables:

- Critical thinking about inequality
- Inclusive, meaningful coalitions
- Policies grounded in lived realities
- Practices that challenge unfair power structures

2.4.2 Tool: Positionality Statement

A common practice of reflecting on positionality is the development of a **positionality statement**, which offers a brief summary of an individual's intersectional identities, privileges, and experiences in relation to the research or diversity, equity and inclusion work at hand. These statements can be created by individuals, teams, or institutions and serve as a starting point for critically examining how these entities are connected to the project and community. Positionality statements are also often included in methodology sections in published works, such as journal articles and reports, to provide transparency about the authors' relationship to the research subject, and also in order to give a reflexive account about how their positionality affected the ways that they chose their theories, conducted data collection, analysed data, and came to their conclusions. When writing a positionality statement, it is crucial to include an analysis of institutional power, as the institution you represent influences your connection to the work.

The Urban Institute's guide on Exploring Individual and Institutional Positionality (Daly et al 2023) provides a great tool in understanding why and how to use positionality statements in community based work, which can be helpful both in IGEP work in organisations and in CoPs. While positionality statements are most commonly used in written works and reports, informal individual or team statements that are not published publicly, or having explicit oral conversations about positionality and privilege in GE and DEI teams can also play very important roles in helping inform and shape the work being done in a productive way. And similarly, ongoing, individual self-reflexivity where one reflects critically on one's own privilege, power, and role in IGEP work can be just as important and fruitful.

Our Team Positionality Statement

Our team consists of three white cisgender women, one white non-binary person, and one white cisgender gay man, all of whom are engaged in gender equality as well as diversity, equity, and inclusion research and practice in Europe. Three of us are based in Denmark (two Danish and one American) at a prominent Danish university, while the remaining two are based in Spain (one Spanish and one British) at a leading Spanish research institution. Our educational backgrounds range from master's degrees to doctoral candidacy to completed Ph.D.s, and span fields such as Gender Studies, Sociology, Anthropology, Economics, and Language and Culture Studies. Two of us work as researchers (one senior, one junior), while the other three are gender equality, diversity, and inclusion practitioners.

As a group, we value lived experience and bring diverse perspectives, including those shaped by migration, navigating immigration systems, being first-generation university students, queerness, raising racialized children, and queer parenting. We value the insights these experiences provide but also recognize the limitations of both our lived and professional perspectives. Our work is informed by intersectional feminist, critical race, decolonial, queer, and trans theories, though our individual areas of expertise and emphasis within these frameworks vary.

Example of an Individual Researcher Positionality Statement:

"My name is Justin Morgan, and I am a Black man who lives in Roxbury. I'm also a member of this project team as a PhD student, so I experience this research both as an investigator and a community member. I've lived in Roxbury less than three years, and my relationship to the space is one of a temporary resident. I get to engage our participants with the authenticity of a Black resident seeking to know more about where he lives and with the institutional authority (and sometimes fraught history) of a Harvard researcher seeking to advance understanding of a historically marginalized community. I use some of the local businesses in our study every day, but my relationship to them is surface level given my brief time living here. – from a Harvard School of Public Health research project studying the impacts of small local businesses on health and well-being in the Roxbury neighborhood of Boston, Massachusetts" (Daly et al 2023, 3)

Team Positionality Statement Example:

"As Crow Tribal members, we have always lived along the Little Bighorn River; we spent our childhoods playing, swimming, fishing, hunting, and berry picking along the river. Our families always drew water directly from the river for both household and ceremonial consumption, and some of those practices continue today. Given our close ties to the river, we observed and remember that water quality began visibly deteriorating in the late 1970s, with the intensification of both ranching and farming and a growing population. Our reports of evident water quality problems to the federal authorities, including leakage from municipal sewage lines directly into the river, went unresolved. We realized that the aging municipal water and wastewater infrastructure was deteriorating and inadequate to serve the growing population, and that we had to address these issues ourselves. Several of us formed the Apsaálooke Water and Wastewater Authority (AWWWA), volunteering to take on the responsibility for tribal water and wastewater infrastructure. – Challenges and Opportunities for Tribal Waters: Addressing Disparities in Safe Public Drinking Water on the Crow Reservation in Montana, USA (Doyle, Kindness, Realbird, Eggers, and Camper 2018)" (Daly et al. 2023, 3-4).

2.5 IGEPs in praxis: Challenges of intersectionality in Monitoring and Evaluating

Having now both explored the necessary components of monitoring and evaluating processes in the last chapter, and also the importance of using an intersectional framework thus far in this chapter, this section will delve deeper into why a data-driven approach and context-specific design in IGEPs is important, and will also explore why it can be difficult to use an intersectional framework in monitoring and evaluating IGEPs.

An intersectional approach to IGEPs is essential to addressing the diverse and interconnected ways individuals experience discrimination. A **data-driven approach** ensures that GEP initiatives are based on both quantitative and qualitative evidence, allowing organizations to identify systemic barriers and track progress over time. By monitoring career progression, leadership representation, research projects, teaching content, and issues such as gender-based violence and sexual harassment, GEPs can uncover disparities that may otherwise go unnoticed. Collecting validated data on gender, race, ethnicity, ability, age, sexual orientation, and other relevant factors helps create targeted interventions that address the unique challenges faced by different marginalized groups. Without this comprehensive data, policies risk being ineffective or reinforcing existing inequalities rather than dismantling them.

Equally important is a **context-specific design** that ensures GEPs align with national policies and local realities. Gender equality challenges vary across cultures, institutions, and social structures, making it crucial to adopt an epistemic justice lens that acknowledges historical power imbalances and amplifies diverse perspectives. Context-specific strategies also enable the development of sustainable, long-term solutions that are relevant to the communities they serve. Additionally, leveraging Communities of Practice (CoPs) and networks enhances GEP efforts by fostering

collaboration, shared learning, and collective action among stakeholders. These networks provide crucial support for change agents working to implement and sustain gender equality interventions.

However, while intersectionality provides a very helpful theoretical framework to help understand and analyze social systems of inequality, operationalizing intersectionality in GEP work is both understudied (Chaves & Benschop 2023; Beeckmans et al., 2023) and can prove to be difficult in practice. Indeed, it can be especially difficult for research institutions in different national contexts to collect the quantitative data needed to do quantitative intersectional analysis due to different anti-discrimination legislation and data protection laws (e.g. some interpretations of GDPR). Such laws (most of which designed to protect employees from unfair discrimination in employment) are interpreted in a way that disallows the organisation from asking their employees about different identity categories such as race, ethnicity, gender identity, sexual orientation, religion, disability, age, etc, even when the organization is trying to collect that data exactly to become more enlightened about the discrimination and barriers that marginalized employees face.

Additionally, such anti-discrimination legislation that makes it difficult for practitioners to gather data on some identity parameters (e.g., race, gender identity etc.) but not others (e.g. gender, nationality) in monitoring and evaluation work also re-produces Western, colonial and binary frameworks of some categories, for example, of gender and gender-identity, as it does not allow space for people to self-identify as other identities, such as genderqueer, non-binary, two-spirit, and other alternative gender identities under the trans umbrella. As such, the data gathered for monitoring and evaluating reports, and the conclusions and follow-up initiatives made from partial data can reproduce unintended biases when they are not intersectional.

2.6 What to do: A Pragmatic Approach to Monitoring and Evaluation with an Intersectional Lens

A pragmatic approach to monitoring and evaluation with an intersectional lens can be necessary in order to actively incorporating diverse voices and experiences to ensure that scientific research and policy advancements are both relevant and impactful across various communities. As outlined above, there are challenges in applying an intersectional approach, and the complexities of analyzing multiple, overlapping social identities—such as gender, race, class, and disability—can lead to difficulties in data collection, interpretation, and can also be difficult when resources (human and monetary) are limited. Additionally, there is often resistance from different stakeholders and also from traditional research paradigms that may overlook the importance of these intersections, making it difficult to fully incorporate intersectionality into monitoring and evaluating frameworks.

Despite these challenges, a commitment to inclusivity and intersectionality ultimately strengthens the ability of policies and scientific studies to address the needs of marginalized and diverse groups, ensuring that no community is left behind. Thus, despite the potential difficulties in using quantitative data in monitoring and evaluating IGEPS, the key findings in INSPIREs scoping review can be interpreted in a way that point to two places where it is possible to take a pragmatic approach to intersectionality in monitoring and evaluation work by focusing on levering the importance of: 1) mixed and qualitative methods, 2) policy, and 3) collaboration with researchers.

Takeaway for Practitioners

To implement intersectionality in IGEP M&E:

- **Importance of mixed and qualitative methods.** Drawing on feminist participatory action research (FPAR) and decolonial methodologies, we argue that including diverse minority groups—especially through qualitative and mixed-method approaches—is crucial for meaningful monitoring, evaluation, and intervention design. FPAR not only helps define indicators and data frameworks but also ensures that those most affected are centered in dialogue throughout an activity's life cycle. This participatory process strengthens accountability, reveals progress, identifies necessary adjustments, and informs future initiatives. By engaging stakeholders across varied roles—students, researchers, faculty, HR staff, diversity officers, and both minority and non-minority members—policymaking becomes more inclusive and responsive. Mixed methods approaches enrich this process by capturing diverse experiences and guiding indicator selection. Ultimately, this shifts the responsibility for dismantling oppressive structures from marginalized individuals to institutions and leadership, framing intersectional equality as a collective responsibility.
- **Policy.** UniSAFE's Toolkit provides insight into how guidance notes and professional guidelines can be used to explain to users the importance and relevance of intersectionality. It also illustrates how language and questions can be adapted to be sensitive to different lived experiences. The toolkit highlights, for example, the importance of professionals working with a GBV approach to ask questions using sensitive language and being mindful of the spectrum of possible lived experiences (e.g., LGBTQIA+ identities, religious norms or beliefs, prior traumas, etc.) (p. 65).
- **Voluntary, Informed Consent and Collaboration with Researchers**. While it is crucial to consult legal and data experts within the organization, some research and innovation (R&I) institutions have successfully employed voluntary, informed consent as a method to gather intersectional quantitative data on their employees, despite having national anti-discrimination laws in place that have historically been interpreted in ways that prevent intersectional identity data being collected. An example of this approach can be seen in the University of Copenhagen (KU)'s University Wide Inclusion Measure, launched in 2024, which exemplifies how intersectional data can be integrated into institutional practices to foster inclusion and address inequalities. Importantly, tools like the GEAM tool can be very helpful in collecting such data on different GE aspects at a given university. Furthermore, research on the topic highlights ways to address inequalities through more inclusive and intersectional approaches to data collection (e.g., Bentley et al., 2023).

Bundled tools and resources – intersectionality

Resource Name	Link to the Resource	Description
INSPIRE: Intersectional policies in Higher Education	https://doi.org/10.5281/zenodo.10033571	This scoping literature review maps the existing scientific literature on intersectional policies in Higher Education and Research institutes.

Resource Name	Link to the Resource	Description
and Research: a scoping literature review.		The goal of the scoping literature review is to identify which scientific literature is available on the topic and what are the current knowledge gaps.
INSPIRE: SPkg2: How to set up an Inclusive Gender Equality Plan	https://www.inspirequality.eu/support/spkg	This support packages goes through step by step the different topics that should be considered when setting up an inclusive gender equality plan, including touching briefly on intersectionality.
ACT Booklet Intersectionality	https://genderportal.eu/sites/default/files/resource_pool/act_booklet_intersectionality_27oct2021.pdf	The ACT booklet on intersectionality, explores how overlapping identities—such as race, gender, and class—shape unique experiences of discrimination and privilege. It emphasises the need for intersectional approaches in research and policy, especially in STEMM fields, where systemic inequalities persist. The document advocates for inclusive gender equality plans and highlights how both qualitative and quantitative methods can uncover complex social dynamics and improve institutional practices.
ACT Videos on intersectionality	https://www.bing.com/videos/riverview/relatedvideo?q=ACT+Booklet+Intersectionality&mid=EC92D447C8B1BB9CE706EC92D447C8B1BB9CE706&FORM=VIRE	This video complements the ACT booklet by visually explaining the concept of intersectionality and its relevance in research and innovation. The video highlights how overlapping identities—such as gender, race, and disability—interact with systems of power, and why it's crucial to consider these intersections when designing inclusive policies and practices in academia and beyond.
The Canadian Research Institute for the Advancement of Women's Feminist Intersectionality: A Primer	https://www.criaw-icref.ca/publications/feminist-intersectionality-primer/	This primer gives an overview of what intersectionality is and why it's important to address when working with discrimination and inequality work in HE.
GEAM Tool	https://inspire.europamedia.org/e-learning/chapter/52/otu2-geam-v3-setup	The **Gender Equality Audit and Monitoring (GEAM)** tool is an integrated environment for carrying out survey-based gender equality audits in academic organisations or organisational units. Its core instrument is a flexible questionnaire framework based upon the Athena Survey of Science, Engineering and Technology (ASSET) and on existing measurement scales in the scientific literature. It comprises a collection of questions that cover most aspects of gender equality in academic organisations, providing high-quality data for designing and implementing gender equality measures and assessing their impact over time.

Resource Name	Link to the Resource	Description
How to Successfully Design and Develop an Inclusive GEP. Addressing Intersectionality, and Geographic Inclusiveness. Policy Briefing v1 for EU-level Stakeholders.	https://caliper-project.eu/clp-uploads/2023/04/caliper_policy_brief_v1_eu_final.pdf	This policy briefing elaborates on intersectionality, and geographic inclusiveness in relation to inclusive GEPs. Focusing on these different dimensions, this policy briefing describes how the CALIPER methodology addresses each one and provides inputs on how to design and develop in inclusive GEP, according to the above-mentioned dimensions.
Holistic: Inclusive language toolkit	https://static1.squarespace.com/static/5ae729f070e8022e46f9af5e/t/610405cb38956863564f8876/1627653579962/Copy+of+Inclusive+Language+Toolkit+V2.pdf	A toolkit helping to lay out why certain language is perceived and felt as offensive and discriminatory and helps also to define inclusive language and give examples of their use. Great toolkit for allies looking for a resource on how to change their language with their colleagues or in their teaching.
UniSAFE report	https://zenodo.org/records/7540229#.Y8493nbMJPb	This report presents a comprehensive analysis of the various strands of evidence gathered through the UniSAFE project. It draws on a multi-level study of the knowledge generated within the project, focusing on the prevalence, causes, and impacts of gender-based violence in research-performing organisations (RPOs), particularly within the framework of the 7P model.
UniSAFE Toolkit	https://unisafe-toolkit.eu	The Toolkit addresses gender-based violence in Higher Education and Research Institutions. It offers guidance on designing effective policies and implementing concrete measures.
Exploring Individual And Institutional Positionality: A Tool for Equity in Community Engagement and Collaboration	https://www.urban.org/sites/default/files/2023-12/Exploring%20Individual%20and%20Institutional%20Positionality.pdf	The toolkit is intended to support researchers, practitioners, policymakers, organisational leaders, and all who seek to examine their own motives, identity, and feelings, to better understand how these influence their work.
Lancet Gas Hep: "Sex and gender in inflammatory bowel	https://www.thelancet.com/journals/langas/article/PIIS2468-	For an example of how to integrate intersectionality into research in the health science: An interdisciplinary team of clinicians, researchers, patients, and gender experts reviewed

Resource Name	Link to the Resource	Description
disease outcomes and research"	1253(24)00159-6/abstract	current literature on the effect of sex and gender dimensions on IBD outcomes. The team also investigated the role that stakeholders have in advancing sex-based and gender-based IBD knowledge, as comprehensive studies are scarce.

3. Power, Backlash and Resistance to (Gender) Equality and Diversity

"We should celebrate as a success case where the status quo has to start to work hard to reproduce itself and has to invest resources and energy in resisting gender change. The need for visible resistance to positive change is a success. It is evidence of the chipping away of patriarchy; it might be chipping away really slowly, but it is changing." (Mackay in Rao et al. 2016)"

3.1 Why power, backlash and resistance?

Addressing backlash and resistance is crucial for sustaining and deepening change. Understanding power structures, imbalances, and relations, as well as strategies to handle backlash itself, is essential for achieving lasting impact. INSPIRE and related projects argue that rather than avoiding backlash and resistance, it is critical to address them directly. This approach is integral to the process of transformation and can uncover inequalities, challenge prevailing beliefs, and construct alternative values (Van Den Brink and Benschop, 2018; Chaves and Benschop, 2023). Given the persistent nature of backlash against feminism and gender equality, strategic handling of resistance is essential for fostering long-term institutional change.

INSPIRE adopts an intersectional and decolonial perspective to advance social change through equality and diversity efforts. Therefore, addressing backlash and resistance within gender equality work, particularly in transitioning from gender equality to inclusive gender equality, remains a pertinent goal.

3.2 Definition of resistance

Resistance is a form of opposition that emerges during change processes to maintain the status quo (Lombardo & Mergaert, 2013; Mergaert & Lombardo, 2014; Salminen-Karlsson et al., 2016). In the context of (I)GEP work, it refers to a refusal to accept the changes promoted by gender mainstreaming, particularly those challenging existing power structures (Palmén, 2021). In this Support Package, we understand resistance as opposition to gender equality policies, including

resistance to intersectional approaches. Rather than avoiding resistance, engaging with it offers valuable insights. Identifying its origins—whether from ideological opposition, media narratives, or interest groups—supports more strategic responses and helps distinguish between misinformation, misinterpretation, or deeper political tensions. Regardless of its source, maintaining core feminist principles remains essential.

Resistance manifests in various forms. Feminist and decolonial scholarship highlights both explicit and implicit resistance. Implicit resistance, often harder to detect, is embedded in institutional norms that can reinforce patriarchal, racist, cis-heteronormative, and ableist systems. Understanding these dynamics is key to achieving meaningful and lasting transformation. For further discussion, see FESTA's Handbook on Resistance to Gender Equality in Academia (Salminen-Karlsson, Sağlamer et al., 2016).

Types of Resistance

This section explores the different ways resistance manifests, from overt opposition to more subtle forms of reluctance and inaction. Different types of resistances can be categorized and exemplified. While explicit resistance is easier to recognise, implicit resistance—such as deprioritising gender initiatives or failing to allocate necessary resources—can be more challenging to detect and address. Resistance can also occur at both individual and institutional levels, with individuals obstructing progress through denial or disengagement, while institutions create barriers through bureaucratic procedures and policies. Importantly, resistance is not merely an obstacle; it is a natural part of organisational change and a sign that power structures are being challenged.

Table 4: Types of resistance

Types of resistance	Example from GEP
Implicit individual resistance	Can be expressed by an individual's insufficient action or lack of action or disengagement in a process or a Gender Equality Plan.
Explicit individual resistance	Can be expressed by an individual's overt actions or statements which can target a Gender Equality Plan or actively seek to discredit or dismantle it.
Institutional resistance	Consists of a systematic, on-going, sustained pattern of non-engagement with the issue of gender equality and a pronounced lack of support for a Gender Equality Plan. Some forms of actions in such Plans, like proposed quotas or changing promotion mechanisms, may be particularly vulnerable to resistance. When a Gender Equality Plan is seen as unachievable or too prescriptive, or if there has not been sufficient information and consultation on the Plan, resistance can also emerge."

(In Palmén 2021, p. 3)

Resistances can be intentional and explicit or subtle and implicit

Explicit forms of resistance are often readily identifiable but can be challenging to address effectively. As highlighted in the ACT: Resistance to Change video, subtle forms of resistance can be even more difficult to detect and, consequently, to counteract. These forms of resistance often manifest through indirect means, such as the failure to allocate sufficient resources or a lack of prioritisation of the issue at hand. While there may be an outward appearance of compliance, a deeper examination often reveals an underlying reluctance to engage meaningfully with the change process. This passive resistance becomes particularly problematic when an institution or organisation formally acknowledges the need for change but consistently fails to take concrete steps toward its implementation. The illusion of compliance not only obscures resistance but also makes it more difficult to challenge, as it does not present itself as overt opposition but rather as an ongoing failure to translate commitments into action.

Resistance at individual level and institutional level

Resistance to change can appear at both individual and institutional levels, each posing unique challenges. Individuals may resist openly - by denying the need for change - or more subtly, through disengagement, reluctance to participate, or lack of follow-through. These passive forms are often harder to address because they don't appear as direct opposition.

Institutional resistance is more deeply rooted, embedded in bureaucratic structures, procedures, and policies. Unlike individual resistance, it can't be easily resolved through dialogue. Delays,

misaligned policies, and organisational inertia can significantly slow progress and require sustained, strategic action to overcome.

As emphasised in this support package and the *Overcoming Resistance* video, resistance is not just an obstacle it's part of the change process. It often signals that power dynamics are shifting. When addressed thoughtfully, resistance can reveal underlying tensions and ultimately support more meaningful and lasting transformation.

The *VicHealth (En)countering Resistance guide* (2024) offers a helpful way to understand and visualise different forms of resistance.

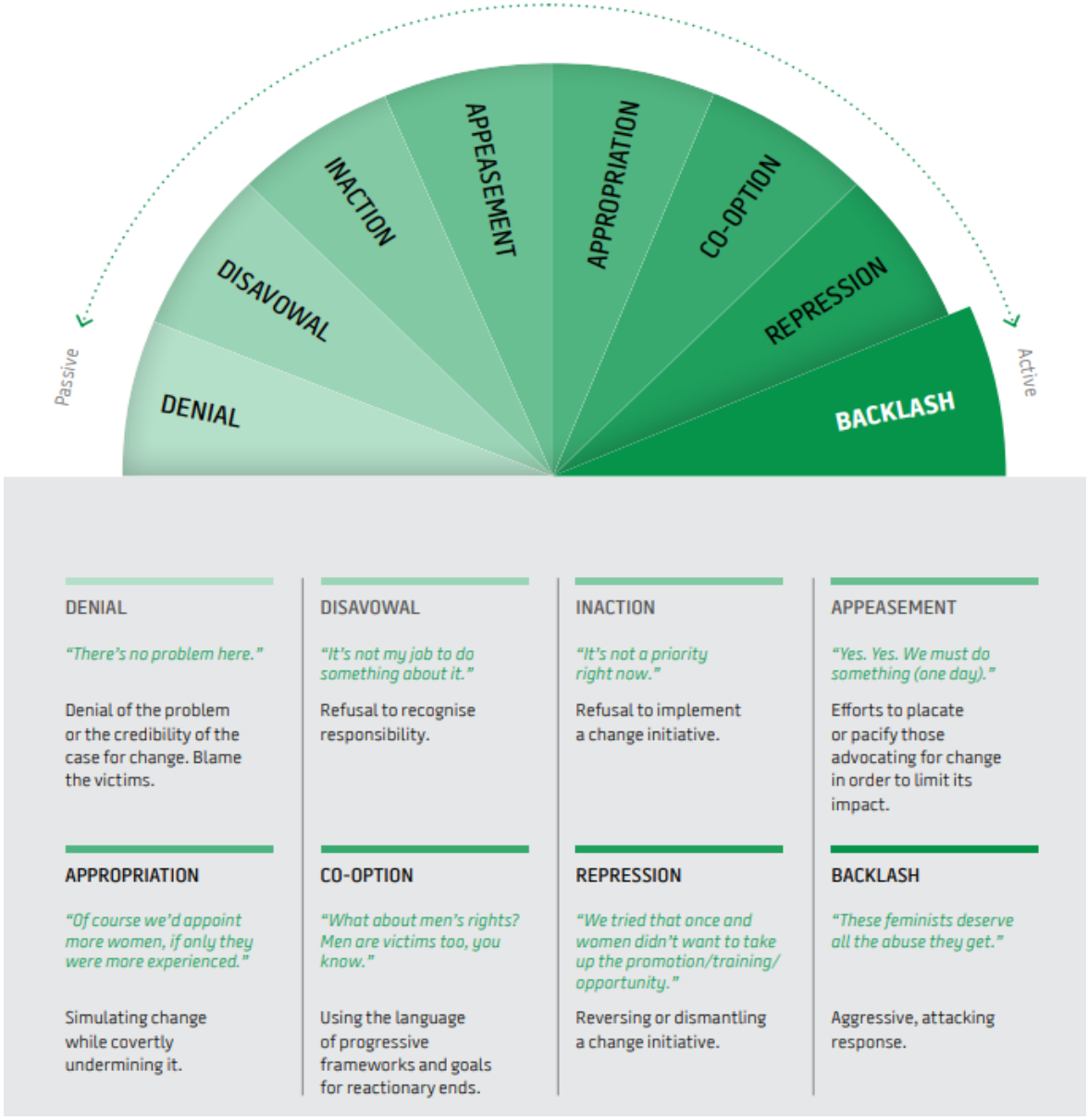
At the most passive end is **denial**, where people or institutions simply refuse to see a problem. They might say things like, "There's no issue here," or blame those speaking up. **Disavowal** is similar - it's when someone avoids taking responsibility, saying things like, "It's not my job." Then there's inaction, where change is put off in favour of other "priorities," often using excuses like, "It's not the right time."

More subtle forms of resistance include **appeasement** offering empty support to avoid real change, as in, "Yes, yes, we should do something… eventually." **Appropriation** happens when people pretend to support gender equality but make excuses not to act, like, "We'd hire more women if they were more experienced." Another tactic is co-option, where equality language is twisted to oppose progress for example, "What about men's rights?"

More direct resistance includes **repression**, where existing gender equality efforts are rolled back. This might be justified with claims like, "We tried, but women didn't want the opportunity." The most aggressive form is **backlash**, where hostility turns into outright attacks on feminists, with statements like, "These feminists deserve all the abuse they get."

Recognising these different forms of resistance helps us respond effectively. While open resistance can often be addressed head-on, subtler types - like inaction or appeasement - need careful, strategic responses. By understanding how resistance works across this spectrum, we can better protect progress and keep gender equality efforts moving forward.

Forms of resistance



(as published in Vic Health's (En)countering resistance: Strategies to respond to resistance to gender equality initiatives (2024)).

Resistance from within: Resistance to intersectionality and to the turn towards inclusive GEPs within feminist groups

In some contexts, there has been pushback from feminists who believe gender should be prioritized over other identity categories. They may resist efforts to centre intersectionality or shift toward broader diversity, equity, and inclusion (DEI) frameworks, fearing that focusing on multiple forms of

discrimination will dilute the fight against sexism. This concern often stems from worry that limited resources—whether political, economic, or human—will be spread too thin.

However, this stance can alienate BIPOC, LGBTQIA+, disabled, migrant, or working-class communities, especially when the focus remains on the concerns of more privileged women (e.g., white, Western, cis-het, able-bodied, middle/upper class). Such exclusion weakens feminist movements by ignoring how sexism is interconnected with racism, classism, ableism, queer- and transphobia—an insight central to early intersectional Black feminist thought (see Cho et al., 2013).

By insisting on a “gender-first” approach, these feminists risk losing connection with a broader coalition of scholars, activists, and practitioners who prioritize intersectionality and solidarity. Projects like RESIST respond to this by taking a queer and trans feminist approach to resistance, highlighting how LGBTQIA+ communities are especially targeted by anti-gender movements.

3.5 Strategic Framing: How to Strategically Address Resistance & Backlash

Facing backlash for feminist work can be tough, but it’s important to stay grounded, thoughtful, and resilient. One of the first things to remember is not to take criticism personally. Most backlash targets the ideas being shared - not the individual sharing them. While some criticism can be helpful and worth reflecting on, hateful or toxic responses often reflect broader social tensions around change, not your personal worth.

When deciding how to respond, choose your battles wisely. Sometimes it’s better not to respond at all - especially if doing so would only draw more attention to misinformation or escalate conflict. If you do respond, stay calm, respectful, and focus on facts rather than emotions. Use your voice strategically to counter false claims and highlight the core goals of feminism in a way that stays true to your values.

Support from others is key. Feminism is a collective movement, and building solidarity with allies - other feminists, social justice advocates, and community members - can make all the difference. These networks offer both emotional support and practical help when you're facing criticism. Protecting your mental and emotional well-being is also essential. Set boundaries, limit your exposure to toxic content, and prioritise self-care. Surround yourself with people who uplift and support you.

Strategically, it helps to reframe the conversation. Show how feminist principles benefit everyone - not just women. For example, feminism also challenges harmful ideas about masculinity, helping men too. Sharing facts, research, and real-world stories can break down misunderstandings and open the door to more meaningful conversations.

Backlash can actually be a sign that the work is making an impact. Social change often meets resistance, especially when it challenges deeply rooted systems of power. While it can feel

frustrating, backlash is often part of the process of progress. The path isn't always smooth, but every step forward adds to the momentum toward greater equality and justice.

3.6 Focusing on community & justice creates deep & sustained change

Importance of Communities of Practice (CoPs)

Building on ACT's resource on Resistance to Gender Equality, Communities of Practice (CoPs) serve as a valuable tool for fostering engagement and overcoming resistance in organisational change processes, including the implementation of Gender Equality Plans (GEPs). Because CoPs emphasise participation, individuals involved in decision-making are more likely to support or at least not actively resist changes, as they have a sense of ownership over the process. By incorporating diverse perspectives and facilitating consensus-building, CoPs help to create solutions that are broadly accepted, reducing the likelihood of strong opposition. Their collaborative nature also encourages mutual learning, increasing awareness of the need for change and fostering a shared understanding of institutional transformation.

Additionally, CoPs provide a space for critical discussions where resistance can be addressed constructively, sometimes leading to a clearer articulation and stronger justification of proposed changes. This can ultimately result in more effective and sustainable reforms. Furthermore, CoPs focus on actual practices within institutional settings, ensuring that change efforts are grounded in real-world application rather than remaining abstract or theoretical. By emphasizing participation, collaboration, and practical implementation, CoPs create an environment where change is both more achievable and more enduring.

Bundled tools and resources – Resistance

Resource Name	Link to the Resource	Description
INSPIRE Deepening and Sustaining Change	https://zenodo.org/records/10032961	An overview of the literature on deepening and sustaining organisational change towards inclusive gender equality in Research and Innovation Organisations. The overview shows that a lot of work has been done on barriers for change and the analysis of this is divided into systemic barriers for change and institutional barriers for change. (see pp. 19)
SUPERA: Toolkit Resistances to Structural Change in Gender Equality	https://www.superaproject.eu/wp-content/uploads/2022/02/Resistances-to-Structural-Change-in-Research-and-Innovation_v02.pdf	The toolkit consists of three sections: 1. Categorising and theorising resistances, 2. common guidelines for dealing with resistances and 3. a resistance toolkit.

Resource Name	Link to the Resource	Description
ACT on Resistance to Gender Equality	https://zenodo.org/records/5137500	The booklet address insights from new research on resistance to gender equality, the role of CoP's, and recommendations and institutional best practices.
SPEAR: Obstacles, Dilemmas, and Resistance to Gender Equality Implementation	https://gender-spear.org/e-learning/virtual-materials/presentation/17/obstacles-dilemmas-and-resistance-to-gender-equality-implementation	A virtual training workshop, which is build op by three ambitions: 1. Providing theoretical understanding that can help analysis situations of resistance, 2. Showing that resistance is rarely only personal, which can help one to give room and power to respond to resistances. 3. Give power and support to continue the work for gender equality.
EIGE: Gender equality plans in academia and research: success factors and obstacles	https://eige.europa.eu/publications-resources/publications/gender-equality-plans-academia-and-research-success-factors-and-obstacles?language_content_entity=en	The pamphlet addresses obstacles to successful implementation af Gender Equality Plans and gives some advice on how to manage resistance (see p. 3).
FESTA: Handbook on Resistance to Gender Equality In Academia	https://www.researchgate.net/publication/311651308_Handbook_On_Resistance_To_Gender_Equality_In_Academia	The handbook focuses on the causes, forms and symptoms of resistance to gender sensitive implementations. Recommendations offers suggestions on different ways of dealing with resistance.
ACT: Resistance to Change	https://vimeo.com/493415371	In the video different forms of resistances are identified: Resistance can be intentional and explicit or subtle and implicit and resistance can take place at individual and institutional level.
Vic Health: (En)countering resistance: Strategies to respond to resistance to gender equality initiatives	https://international-wim.org/wp-content/uploads/2024/11/Encountering-Resistance-Gender-Equality.pdf	This resource draws together different effective tools and strategies in order to address and respond to backlash and resistance to gender equality initiatives. It's intended purpose is to support practitioners and people working for gender equality in across sectors.

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Examples of estimated costs for SPkg 4

SPkg 4 – Sustaining and deepening change in the form of an evaluation methodology is supported by 5.000 Euros. Eligible costs cover travel and accommodation for CoP meetings, and consulting hours for Change Catalysts and/or other INSPIRE experts. Only Change Catalysts and experts listed in the INSPIRE stakeholder database are eligible to be contracted and funded by INSPIRE.

The table below indicates some of the activities that are eligible.

Resource type	What it includes
Travel & Accommodation	Travel and accommodation costs of CoP member for different occasions like kick-off or periodic meetings. Travel, accommodation and inscription fees for conferences, symposia, and other dissemination events.
Change catalysts and experts	Contracted hours for external trainers, experts, consultants or mentors that support and mentor CoPs in their efforts to address and resolve context specific challenges related to SPkg 4.
Other	Other costs of services that support CoPs in their efforts to foster inclusive gender equality.

Table 5: Examples of eligible activities in SPkg 4

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