

Next Equinet Strategic Plan (2019 – 2022)

Internal note – Background information and materials

The current Strategic Plan (2015-2018) will come to an end this year and Equinet is launching a new strategic planning process to cover the years ahead (2019-2022). Since the last strategic planning process in 2014, Equinet has evolved and the context has changed. The present internal note summarizes recent information Equinet has gathered from its membership, Board and past external evaluations with the aim of informing the Board of strategic issues identified for the future of the network and its members.

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I.a Strategic issues as identified by the External evaluation 2016

(Extracts of Evaluation Report by Transform, John Tierney)

In the lead up to the year of EQUINET's 10th birthday, Equinet seems to have had another very successful year (2016).

- It is on track to deliver its Strategic Plan
- The volume of its activities is stable...
- ...while satisfaction levels amongst members and external stakeholders remains very high
- Most members use Equinet's knowledge and work in their own organisations
- Equinet continues to enjoy high levels of credibility as one of the accepted actors within the EU system

As it works towards its next strategic plan, EQUINET needs to reflect on several emerging factors...

- It should think about how it can fill the need amongst its target audiences for stories that fill the gap in knowledge between big data and individual cases.
- It should consider how it embraces and leads through the greater complexity that comes with greater size and higher levels of success.
- It should reflect on how momentum and energy can be sustained in a maturing network that is moving out of its early youthful phase.

These challenges are all about leadership, and in a year of governance transition, it will be essential that the high-quality leadership that has been enjoyed so far is sustained in the years ahead.

A birthday is not a birthday without some birthday wishes. Here are five.

1. EQUINET and its sector come through the current period of political and narrative challenge in good shape
2. EQUINET finds ways to reach more deeply into member organisations to touch in a meaningful way with the leaders of tomorrow alongside the leaders of today
3. EQUINET is as embedded at the political level in Europe as it is at the official level
4. EQUINET develops its offering to embrace the multi-pace Europe that seems to be emerging politically and finds ways of deepening its relationships with NEBs wherever they are in the spectrum of European integration
5. EQUINET finds ways to keep the network fresh and young as it matures into its second decade.

Thus, overall, as in previous years, Equinet continues to be the right organisation, doing the right things, in the right way, as all report.

Full Analysis of the results of the External Evaluation 2016

Birthday Blessings: Reasons to Celebrate

As EQUINET prepares the cake and thinks about lighting the candles for its 10th birthday, it has several reasons to be cheerful, to think that, at the grand old age of 10, it has lived its short life well and, that the last year has been a particularly good one.

We're often told to 'count our blessings' but we seldom do. In the experience of this consultant, many policy networks fail to understand the attributes that follow, so let's break the habit of not

counting our blessings here. Funnily enough, there are ten of them – 10 candles on the birthday cake.

1. **EQUINET is strategically well-positioned**: It has a clear and needed niche and fills that niche well, according to respondents.
2. **EQUINET understands what a network is**: It understands that a network is subtle and not like an organisation, entirely based on relationships and shared interest, so the mechanisms of control are different and focussed on influence and addressing pressing common needs, creating coalitions and providing social and intellectual leadership.
3. **EQUINET has aligned its membership and its key external stakeholders to its niche**, so that it has become a shared cause. The critical mediator, fostering this alignment is the board and its governance role. Alignment is very hard to achieve and very hard to maintain. EQUINET does this exceptionally well.
4. **EQUINET strives for high quality**. It knows that the quality of the substantive policy work that it carries out and the way that it carries out all that it does must be of high quality and that quality is a journey to get better each year. This point is evidenced in the scores that have been given each year. But these scores are not automatic and must each year be delivered through hard work. Everyone in EQUINET understands this implicitly.
5. **EQUINET understands that its work is for the long-term**: The issues that EQUINET addresses are not ones that can be 'fixed' within a parliament, but perennial issues that must be worked away at carefully. This means that conversations and relationships, institutional as well as individual, must be long-term and EQUINET understands this well too.
6. **EQUINET is learning to embrace its own difference** and, thereby, manage conflict very well: This attribute has been tested and found to be strong in the work on Standards for equality bodies. The traits involved have been listening, given space for expression, seeking common ground, not grand-standing, taking a long view, never seeking to marginalise. It is rare for organisations to do this well, but EQUINET does so.
7. **EQUINET understands that it must be consistent** in its work output and quality: To maintain a high reputation, work quality – the quality of publications, of events, of communications, of interlocutory work, of member services - must be high every time, year on year. This is very hard. It requires total dedication and not just enthusiasm or skill. EQUINET has shown this attribute in all the evaluations of the past few years
8. **EQUINET has good judgement** about the issues and when they are ready to be aired: In the policy arena, you need to hit the (policy) wave just before breaks. So, you must spot the right issues early on and develop or research them well before they break, so that you can time your outputs to land just when policy makers and influencers need them. This is very hard. But the evidence from this and previous evaluations is that EQUINET is getting better and better at this, with the notable examples of Standards and Intersectionality this last year.
9. **EQUINET seeks depth in its relationships** with its members and partners: The data in this evaluation show that EQUINET's penetration into member organisations is very high. The same seems to be true amongst those other external agencies it seeks to work with and influence.
10. **EQUINET is open to learning and to feedback**: The way EQUINET is open to feedback from, for example, these evaluations, but also other forms of feedback is remarkable and to be highly commended. This attitude of mind marks an organisation that is keen to learn, to squeeze the potential learning from any situation. Understanding and working with failure – for failure is

always close to us – is well documented as one of the key ingredients of success in organisational and leadership life.

Birthday Blues: What's not to like as you get older?

It wouldn't be a 10th birthday without a few disappointments or anxieties. Maturing is a demanding process, and there are often things that are not quite right for the big day. Happily, there are only five in EQUINET's case and they emerge directly from the data in this research.

1. **Coping with the negative external narrative:** The political head-wind that EQUINET is facing in relation to equality and human rights continues, as many of the respondents note, and the very future of an integrated Europe may be at stake. Without being in any way distracted from its mandate, EQUINET needs to face into this question. How, in an increasingly 'post-fact' environment, does EQUINET get its message across. However, while this may be the macro point, more prosaically, but equally importantly, individual member organisations are struggling domestically with this head wind. The forces that are at play are far bigger than one organisation or network, but there are hints in the data about the appropriate response. In the past, these evaluation reports have noted the value that good quality data about the trends, eg in cases and local policy issues, can play in making the case. There remains a gap, it is noted this time, in helping, for example, officials and parliamentarians, understand what these trends mean in terms of stories. There is a space between the macro-data and the micro-case that EQUINET can, it was said, usefully and more confidently fill. In popular language, this is about taking back the narrative, but it would be an important element in any case, whatever the political climate and one that EQUINET may consider how it goes about doing that more intensively.
2. **Greater size leads to greater complexity:** Organisations that are successful tend to grow. And with growth in the number of members in the network, in the number of staff with support needs to be met, in the number of external relationships to be sustained and in the number of issues that must be handled, comes complexity. Complexity is inherent, then, in a successful organisation. We see the signs and strains of this success in little 'symptoms' like member fatigue, as expressed in the lower number of people participating in surveys – including this one – and in staff whose support needs are not being met in the same way, or in members who are feeling that their particular interests – to do with their region or their mandate, for example – are just not quite being addressed well enough. The problem with complexity is that it gets worse the more successful you are. But we know that successful organisations are the ones whose leaders can embrace and manage or at least lead through the complexity. Complexity is the job of the leaders, in this case the senior staff and most especially the board. It would be too trite to say that if the problem on the board agenda is simple, it probably shouldn't be on the agenda, but that thought may be a guide for evaluating board discussions, at least in general terms. And job of leaders in this situation is to make things simpler for others.
3. **Sustaining momentum in a maturing network:** This point relates to the last. This report has observed that one of the hallmarks of success in EQUINET's case (and in any professional service organisation) is delivering high quality *consistently*, year in, year out. This is where the real leadership skill comes in ensuring that the pace of things is stretching while remaining sustainable, and that colleagues' energy levels can be renewed for the next challenge. There are only a very few signs that this issue is causing difficulties now but it will inevitably come to the fore in the years ahead. Part of the response to this question is to be found in the data:

segmentation, ie meeting different needs in a range of ways that more sensitively touch their interests or needs. This agenda will likely remain a critical one for the foreseeable future.

4. **Sector boundaries: Is EQUINET's niche that clear?** So many of our conclusions are based on a foundations stone – that EQUINET's strategic positioning is sound, it has a clear niche, we all know what it's there for. But is it really? Some don't think so, but are only prepared so far to speak softly about it. From the point of view of professionals in the field, it may be very easy to see the difference between equalities and human rights, but from a public perspective the clarity of that difference can be more difficult to understand. And of course, in some countries the respective institutions have been merged. So, when it comes to the pan-European level, what's the response? The response so far has been a wise one: to cooperate very closely to try to ensure that there is neither overlap nor gap in terms of how policy stakeholders and overlapping members are dealt with. Of course, in practice, this can sometimes work smoothly and sometimes not, so smoothly as noted particularly in last year's evaluation report. Working this question through to a conclusion will be one of those longer-term discussions that EQUINET has shown it can excel in.
5. **Building creative leadership:** All the four challenges outlined above point to one thing – leadership. But what is the nature of this leadership? It is obviously not the command and control style of leadership, but a leadership that has high levels of emotional maturity and sees its role as an influencer and not a LEADER (in caps). How does leadership like this happen? It happens in every conversation that the leaders (or the leadership collectively) have with anyone they are working with, because each time they speak, a leader is setting a tone from which others will take a cue, a hint. This is as much about the issues that are picked up as about the way in which they are picked up. EQUINET has been blessed with a heritage of high quality leaders at the executive and non-executive levels, who fulfil all these requirements (and others). In a year of governance transition, ensuring that this rich inheritance can be passed on is of the highest priority, in the view of this report, for the future of the network.

Birthday Wishes: When I'm 20, I'll...

The questions picked up in the previous section point to challenges now and to thinking too about the new strategic plan to be developed during this year. But what of the longer term? If ten years is a short time, the next ten will pass very quickly. At the tenth birthday party, what are we wishing for a successful twenty-year old in ten years' time? Interestingly, there are five of these too.

When EQUINET is 20, it will...

1. **Still be here:** If we follow something like Maslow's hierarchy of needs, survival is surely not something to be aimed for on its own, but at the same time survival must be a question that deserves asking in the tough climate outline in this report and elsewhere. The challenge is understanding the high level of volatility politically across the continent, the impact it may have on the sector and the difficulty there is in predicting how things may go. It is interesting that in this week, as this report is finalised, the European Commission has issued its own set of five scenarios for the future of the Union, with the invitation to Member States to help decide which is the one to aim for. Scenario planning is not a way of predicting the future, but it can be an effective way of an organisation or network to come to terms with the types and scale of change that it may face in the years ahead. Of course, it can inform strategic planning as well. An additional activity to celebrate the 10th birthday may be a commission to develop an understanding as to how the equalities and human rights scene may develop over the next ten years.

2. **Be nurturing the sector leaders of tomorrow**: EQUINET takes steps to reach deeply into its member organisations. It has been successful at this. In ten years' time, today's junior professionals will be their organisation's leaders, the leaders of the equalities sector. We see in the data that there is still a way to go to create an understanding of what EQUINET is and does at the more junior levels of member organisations. This then is one of the next challenges, to figure out how to reach this audience in a meaningful way. Perhaps more systematic thinking can take place on this question in the next strategic planning round.
3. **Be embedded at the top political as well as top policy levels**: EQUINET has strong relationships wherever it turns, it seems, but it is safe to say that within the European institutions those relationships are strongest the official level in the Commission than in the Parliament. And there seems from the data in this report to be an interest in hearing more from EQUINET in this institution. This opportunity touches too on the earlier question of narrative and having the stories to address if not shift the narrative about equalities in Europe. And it speaks too to the thought in the data that EQUINET needs to deepen its story-telling capacity in the space between big data and case histories.
4. **Be embracing the new vari-speed Europe**: Whatever the outcome of the current year's elections, the geometry of Europe is set to become more complex over the years ahead. EQUINET understands this and is keen to see the involvement of NEBs from states that are not yet accession states, but on the periphery of Europe. As Europe evolves, so will the geometry of its membership and, thereby, the need to involve in more creative ways, with different levels of funding, NEBs from across the new Europe.
5. **Be keeping the network's passion alive**: As organisations mature, they can easily become tired or being ever so slightly to gather dust. The organisation life cycle graph describes this trend very well. It will be the job of the board, in particular, to be alert to any signs of aging (as opposed to maturing) in the years ahead to make sure that EQUINET remains the fresh and energetic organisation that it is today

Ten reasons to celebrate the tenth birthday; five areas to reflect on and address; and five wishes for the next ten years. $10+5+5=20$. A simple formula to guide the network as it matures and navigate the increased level of complexity within its sector and in its external environment.

I.b Strategic issues as identified by the External evaluation 2015

(Extracts of Evaluation Report by Transform, John Tierney)

Equinet could consider two areas which may help it move to the next level of excellence.

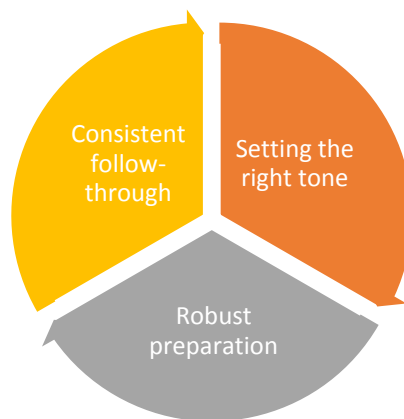
- **Reengineer its approach to publications and research focussing more closely on how its target audiences' needs may be segmented and thinking of different ways of meeting their various needs**
- **Reviewing certain elements of the internal workings of Equinet, not least:**
 - **considering adopting a theory of change**
 - **providing greater continuity of leadership at board level**
 - **continue to ensure financial sustainability**
 - **considering adopting a risk register to improving its data capture systems**

Full Analysis of the results of the External Evaluation 2015

2015 was an excellent year for Equinet. Not only are the scores high in this evaluation – once again - but there were some significant external symbols of recognition during the year too, be that in terms of high level access or highly praised events, not least the Religion and Belief and Standards work.

The general prescription for when things are going well is to keep on doing it. But doing what exactly? Can we discern from these data and from the evidence of previous year what the recipe is? Having reflected on the data in this evaluation, three simple, but powerful qualities come to mind: tone, preparation and consistency (Figure 4).

Figure 1: Ingredients of Success



Mention is made in this report of the effective way in which business is conducted – relational, friendly, open, professional, calm, light-hearted. This is said in relation to the staff, but it has been said too in relation to the board. Organisational culture is very powerful and people take their cues from the tone that is set, particularly by the organisation’s key players, about how they will behave. Somehow, Equinet sets a tone in which it communicates firstly that it understands what a network is and how decisions must be made in a network, but at the same time that is in a way that doesn’t lack boundaries. It’s saying ‘we’re open and we care, but we’re professional too and we have a clear shared purpose.’

While staff may feel that they are sometimes rushing to catch themselves up – each year, it is said, the staff were rushed off their feet – the comment that is often heard is how well prepared events are. This is so important in a network, where its members are very clear what they are doing, where they are doing it, how they are doing it and why. Such ‘hygiene factors’ are key to any event: get them wrong and people will remember, get them right and they don’t really notice too much. So, robust preparation is the second critical ingredient of the success of Equinet.

But while the right tone and robust preparation are important, they are not enough. You have to see things through. One of the comments last year, around the strategy setting process, was that while the process was solid and inclusive and the resulting plan supported and clear, the plan was still a plan, and it’s from the action that follows the plan that the judgment will be made. Equinet seems to get this and has the quality of consistency – keeping the wheel turning, keeping things going, taking things to the next level, and doing that each year.

If these three ingredients do capture the recipe of Equinet's success – and perhaps there's a discussion to develop this idea – future proofing the organisation will be to remember these ideas and to come back to them from time to time.

Embedding in tough times

It is a truth universally acknowledged across the sector that while the challenges for equalities and human rights work have gone up and certain aspects of them are at the highest levels of the political agenda (religion, migration, etc), this is a tough time for equality bodies, both to be heard and to gain political backing in terms of resources to fulfil their mandates. Austerity budgeting only adds to the challenge. So, the question arises, what then is to be their response in this context and, thus, the response of the network?

And the response must surely always be to attempt to cohere more around the key issues and to increase efforts to learn more for each other. Solidarity in other words. But a solidarity that doesn't come so much from adversity, but curiosity. How can we learn more from the best work of others to gain more traction for our organisation? How can our experience and data support clearer, more consistent messages that will help them develop appropriate policy response, based on evidence, at both national and EU levels? How, too, can we understand really well which of our activities have most impact on the policy environment?

This then is a question of becoming more embedded and of finding ways to drive performance continually. Thus, the appropriate response in such times is to penetrate more deeply into the sector and to become even more 'networked' as a network. But how, especially since things are already said to be working really well? The data from this evaluation seems to support two ways:

- Reengineer the process of generating and disseminating key messages to agree greater impact
- Increase the focus on measuring and managing performance and impact, on gaining data to do that and on investing in critical management functions

Together these things do not amount to any remedial action that Equinet needs to carry out to fix something that is broken. On the contrary, the agenda here is how to move to the next level – and at the same time drive up some of the lower (although still quite high!) ratings in the evaluation.

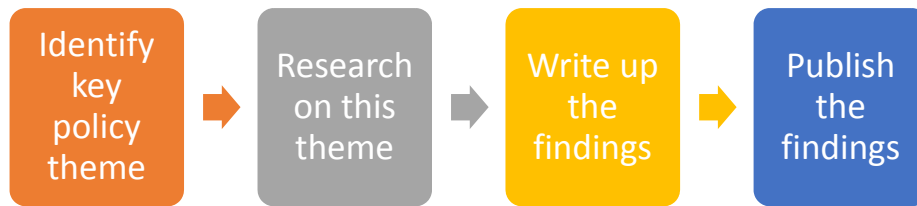
The process of generating and disseminating key messages

While muted, there have been comments about publications for some time, not so much about their thoroughness, but about their impact. The data from this evaluation picks out the cause of this residual concern, and adds to our understanding of an issue we've spoken about before in these evaluations.

Members value the fact that Equinet publishes its findings, but these findings are not consistently used back in member organisations. And the evidence that Equinet's reports impact meaningfully at the EU or international policy level is also faint. If this is the case, what can be done?

The traditional model of report production, deployed by many EU and national policy networks can crudely be summarised in Figure 5.

Figure 2: Traditional Policy Publication Model



What's wrong with such an approach? In principle two things need to be considered. First, it doesn't speak about what change is hoped for, who is expected to be influenced and how are they best reached. And second, there is no automatic loopback to see whether the policy theme's scope was indeed the right one.

Could we reinvent the process a little and suggest a different way of engineering projects that might result in published work (Figure 7).

Figure 3: Reengineering Publications for Greater Impact?



In other words, we begin to think target audience and media much earlier in the process, and we adapt our messaging to meet their needs specifically. This approach puts much more into the planning stages of a project and probably more into the communication, launch and follow through stages. It may imply that fewer research projects are undertaken, or that there are some which are long and in-depth, while others are much lighter in terms of researched content. Because the point, always the point, is impact rather than output.

There no suggestion here that Equinet doesn't already understand this, but there is evidence that this approach of another version of it isn't practiced consistently and this impacts on perceptions (and probably the reality) of impact.

Data in the evaluation suggest that while good, external communications are not up to the high level of internal communications. Comments were also made about how little Equinet uses social media to reach deeper into the organisations of its target audiences, including members. Members themselves suggest that they don't always do their job in ensuring that the messages get cascaded

across their organisations, but that many of their staff don't have the level of English, the language of the reports, to absorb the ideas presented in them.

Whether it's internal to the network or external to it, the point is the same: how to reach more deeply into target audiences and tailor communication outputs that meet more closely their needs and preferences.

So, this goes further than writing sharper executive summaries to reports. It's about a range of messaging outputs that work for different needs. It is the case that Equinet has very few Twitter followers (909), Linked in Supporters (44) and Facebook friends (1,590). And yet, while many of Equinet's key influencers may use any, or all, or indeed other such tools, it is fair to assume that such tools are highly effective ways of reaching those, for example, NEB staff members, staff members of external agencies, etc who are on the radar of Equinet but not the focus of immediate attention. This means, developing the theme of the previous set of comments on reports, thinking a little more strategically about how to reach more deeply into new part of existing audiences bases with appropriate messaging (Figure 7).

Figure 4: Segmenting messages and communications media - Full report? Exec Summary? Briefing note? Press release? Social media post? Tweet?



Focus on measuring performance and impact

As suggested above, Equinet needs to have in place management levers to drive performance and to maintain consistency. And to do that better, it may need a little more robustness in terms of its toolkit. We having mind a number of points that emerged in the data on this overall topic:

- KPIs (Key Performance Indicators) – by far the longest item under this topic, but also...
- Other levers:
 - Considering adopting a Theory of Change
 - Governance continuity/quality
 - Financial sustainability

- Staff retention and risk register
- Data on the external issues

KPIs

First, let's take the new KPIs and assess what the results tell us in a simple as way as possible. Appendix 2 provides Equinet's own document of this subject. What follows below is a simple table offering Equinet's own assessment and what we know from this evaluation, which attempts in particular to assess the outcome/impact indicators.

Output Indicators

Indicator	Result	Comment
<u>Objective A: Building capacity of and peer support for equality bodies</u>		
The number of staff members of different equality bodies engaged with in the capacity building activities	340	Since the same people may have attended more than one event, and this was not taken into account for the 2015 events, a new measuring system will give more accurate figures from 2016
The number of specific innovations promoted for the work of equality bodies	3	The Evaluation Lab, the Cluster on Standards and the Training session on EU funds
<u>Objective B: Contributing to the European equality agenda</u>		
The number of contributions made to European level policy-making and activity in the field of non-discrimination and equality	17 + 3	Equinet spoke at 17 different events, as well as producing three Equinet Perspectives one on Gender Equality another on Religion and Belief , and the third due out at the end of January on Economic and Social Rights
The number of European level policy-makers and stakeholders engaged with on issues of equality and non-discrimination	Equinet met with 95 people in 67 external meeting	This figure does not include those people that we met through our own events or those external events which we attended or participated as speakers
<u>Objective C: Serving as a knowledge and equal treatment hub on equal treatment</u>		
Number of e-newsletters published	14	14 external e-Newsletters were produced throughout 2015, including 10 Newsbooks and four Spotlights on Equality Bodies
Number of research and reports published	5	<ul style="list-style-type: none"> • An Equinet Perspective - The Persistence of Discrimination, Harassment and Inequality for Women • An Equinet Perspective - A Growing Agenda: The work of equality bodies on the ground of religion or belief • An Equinet Discussion Paper – Equality bodies and Freedom of Movement • An Equinet Paper – The Sanctions Regime in Discrimination Cases and its Effects • An Equinet Perspective – Equality bodies contributing to the protection, respect and fulfilment of Economic and Social Rights (due out end of January)
Number of meetings and interactions with stakeholders	20	There were 20 occasions where Equinet got to speak with stakeholders through external meetings and events
<u>Objective D: Consolidating the network and the position of its members.</u>		

Indicator	Result	Comment
Number of meetings with stakeholders that enable coherence and cooperation on shared concerns	3	Of the 20 meetings mentioned above, the two meetings organised with NGOs and social partners at the beginning of September 2015, as well as the meeting on the Horizontal Directive could be included here
Number of initiatives to explore and deepen understanding of links between equality, human rights and ombudsman mandates	5?	Equinet was represented in all of the events held within the Cooperation Platforms organised by Council of European, European Agency of Fundamental Rights (FRA), ENNHRI and Equinet. These included: <ul style="list-style-type: none"> ➔ Hate crime and hate speech meeting in Riga in March 2015 ➔ Operational Platform on Roma Equality meetings in January and December 2015 in Strasbourg ➔ Economic and Social Rights meeting in October 2015 in Strasbourg ➔ Communication meeting in Vienna in May 2015 Furthermore, Equinet attended the ENNHRI Working Group on UNCRPD twice during the year.

Impact Indicators

Indicator	Result	Comment
<u>Objective A: Building capacity of and peer support for equality bodies</u>		
The number of staff members of equality bodies making use in their work of the knowledge, skills and learning gained as a result of their participation in Equinet activities	?	29% of member respondents believe 50% or more of their staff make use of the Equinet knowledge base, while a further 69% believe that at least 10% of their staff do so. The way we assess this KPI doesn't quite answer the question, but comparison in subsequent years may be valuable.
The number of equality bodies making use in their work of the knowledge, skills and learning gained as a result of Equinet activities	32	70% of member respondents say they make use of the knowledge, etc of Equinet a great deal of quite a lot, so one might reasonably infer that 70% of all the members do from this sample, hence 32
<u>Objective B: Contributing to the European equality agenda</u>		
Evidence of influence by Equinet contributions in policy and legal documents published by European institutions and international organisations	2	<ul style="list-style-type: none"> • EC Report on Directive 2004/113/EC & EP Report on Directive 2006/54/EC on implementation of the principle of equal treatment between men and women in the access to and supply of goods and services • Annual Fundamental Rights Colloquium as speakers and a chair
<u>Objective C: Serving as a knowledge hub on equal treatment</u>		
Number of unique visitors and other relevant website analytics (e.g. average time spent per page)	Data not clear on this?	This internally recorded data show the traffic to the website from 1 January to 31 December 2015. The peaks in July are linked to the publication of job offers in both Equinet and ENNHRI
Number of followers and other relevant social media analytics	Twitter = 859 LinkedIn = ? Facebook = 1590	There has been a 45% increase in the number of followers on Twitter, up from 474 on 8 January 2015 to 859 on 5 January 2016. The number of accounts that Equinet follows has also doubled, up from 281 at the beginning of 2015 to 563 at the beginning of 2016. Throughout 2015, we had 569 Tweets altogether, including retweets of other people's tweets. The number of Facebook followers has increased by roughly a third from 1071 on 8 January 2015 to 1590 on 5 January 2016
Number of opens and clicks in disseminated	Total opens in-	Total clicks in-year = 1137

Indicator	Result	Comment
Equinet newsletters	year = 5438	Average opens per edition 388 In June, there was a big importation of email addresses from all of the events that we had during the year, as well as other lists being amalgamated into one single list.
The number of equality bodies and stakeholders making use in their work of the research publications	Members = 44.4% all the time or often External = 70% all the time or often	One might be able to reasonable infer from these figures the number of members who use Equinet's publications as the sample was large, but the External figure may be more dubious, since, arguably, only the least active of external stakeholders were arguably less likely to respond to the survey.
<u>Objective D: Consolidating the network and the position of its members</u>		
Perceptions of equality bodies that their work has been supported and enhanced by the work of Equinet	?	This question was not directly asked in the survey. Question 5a) did ask about how influential Equinet is as a result of its policy contributions and legal documentation, but that's not quite the same thing. There are questions too on Equinet as a knowledge and communication hub, but that's not quite the same thing either. However, both of the answers to these questions are positive and one might generally infer that the answer to this specific question is very encouraging. However, we don't quite have data to be sure.

Right indicators?

What is this information trying to tell us and does it tell us what we need to know?

Comparing the output indicators with the data used for the last three years (see Figure 4 of this report), one might argue that the outputs chosen for the new KPIs, while appropriate in many ways, don't quite yet provide a full picture of the scale of Equinet's operations. We lack a sense still of volume, inputs (money and effort) and participation (who attended what). Both the new KPIs and the table at Figure 4 also lack a summary of immediate outcome, as registered by the post-event evaluations and summarised in the graph on page 15. So, perhaps a review of especially the output indicators may be helpful in the months ahead.

As for the outcome indicators, they are an effective first go at a difficult topic. We may need to tweak the evolution questions a little to ensure that we can actually assess each KPI effectively, but in general they seem to do the job.

What does the data mean?

When one considers the data here, it is, in some cases, it's hard to know what 'good' or 'excellent' looks like as we have neither trend data, nor comparisons with others. Generally, the picture looks positive, but one can't quite be sure.

Right process?

What follows from this is that there should be regular reports – we suggest six-monthly is fine for outputs and yearly for impact indicators – where the meaning from the KPIs can gradually be discerned.

These data should show target and past trends as well as current performance. Of course, this is not to say in any way that more is better and we must focus on volume of work. It could be, for example that volumes fall, while impact increases. Were this to be the case, the board would a) have data to show that and b) likely be inclined to understand how this was the case.

Conversely, if volumes of work were increasing, but indicator of impact were falling, the board would again wish to understand how. And, with such data, it can start to ask smarter questions.

Thus, we must conclude that having routine reports of this nature will gradually enhance the board's ability to give accountability and sharpen the focus of the staff to do those things that are most important

Other levers

Adopting a Theory of Change

While KPIs may help monitor the strategic plan, there may be a missing piece still in the jigsaw. By means of this evaluation we are attempting to measure or at least gauge impact. Thus, we assume that one thing, probably Equinet's activities, lead to some outcome and eventual policy impact. But what exactly is the supposed relationship between these elements? And if we assert that relationship does the data in fact substantiate it? Indeed, are we collecting the right data (ie KPIs) to test our assumptions?

The assumptions that a social change agency makes about how change is delivered are often described in a [theory of change](#). Very roughly, Equinet's theory of change may go something like that described in Figure 8.

Figure 5: Towards a Theory of Change?



Of course, such a rough first attempt misses much out and colleagues will doubtless be able quickly to improve upon it, but this is the point: getting to the place where there is an agreed theory of change may enable greater focus, enable smoother evaluation and offer a model that members themselves may wish to take up.

Governance continuity/quality

Many of the areas of Equinet's world receive high praise again this year, but none more so than the governance of the network. Why then suggest any change? A couple of points come up with point to

some minor adjustments to help ensure continued governance quality and consistency, all of which make sense. In addition, there are two points that occur to the consultant:

- Considering lengthening the board terms to facilitate continuity of leadership
- Review the regional 'constituencies' to give them more credibility than they enjoy at the moment
- Consider a skills/perspectives review of each new board to help facilitate a conversation on whether there are any gaps and how such gaps are to be made up (eg by cooption, etc)
- Consider adopting a Code of Good Governance appropriate to the sector and, as they frequently suggest, undertaking every couple of years 'light-touch' governance performance reviews and/or individual board member reviews

Financial sustainability

Previous reports have observed how activity may be constrained by reliance on just one source of income. It is pleasing to see how increased financial sustainability is being achieved by successfully gaining other grants for other funders. A positive trend – and a change that marks the resolution to a long-running discussion. May it continue!

Staff retention – risk register

This has also been a topic for previous reports since it is an area of risk for the network. And it makes one wonder about whether there is a risk register in place, where these and other risks may be itemised, evaluated and their effects mitigated.

Data on the external issues

Mention was made by respondents of the great value that robust data can have to make any policy case. And it was further said that Equinet is in a unique position in this respect to collect and collate data on cases, and so on. Acknowledged as a problematic area, this must be an opportunity for Equinet if it can make progress where others have so far failed.

Overall

To deepen Equinet's impact, during troubling times for the sector, consideration of strengthening the levers both to understand and to manage things is an appropriate response. This evaluation report finds that it is perhaps in these five areas where that can most effectively be done.

II. Reflections from the Equinet Secretariat on Equinet operations

Reflections on learnings from the Strategic Plan 2015-2018 and work operations during that period:

What has worked well?

- **Capacity-building and peer support work:** **Working Groups** are very important structures for peer learning and capacity building, where members' engagement remains high.
- **Smaller Training events** format: introduced only few years ago, successful format that is welcomed and supported by members. Well suited for particular topics, some trainings (social media) were repeated due to popularity.
- **Thematic clusters/project** format: overall positive and effective focused on specific topics for a given period (e.g. Standards for NEBs, Research work, Violence against women). But topic should really be member-driven as issues that came from the Secretariat may have worked slightly less well on some occasions (Evaluation Lab).
- **Contribution to European Equality Agenda:** significant progress in this area and the very positioning of Equinet and NEBs at EU level, increased recognition of importance of role, Equinet contributions well received...
- **Internal Communication** tools: introduction of Equinet Members Bulletins well received and used by members.
- **Communication hub:** Positive feedback from stakeholders to Equinet Newsbook and social media communication
- **Governance:** overall very engaged Executive Board and strong leadership + attendance of AGM by almost all members
- Overall, a strategic plan 2015-2018, that has been described by members and many stakeholders as **clearly structured, well-presented, easy to follow and understand** (claims to have been used as a good example and inspiration by partners for own strategic planning development)
- Strategic Plan structure **relatively easy to use** as framework to develop related annual operation Work plans year by year during that period.
- **Clarity, ambition and "implementability" of Strategic Objectives A and B** (A. Building Capacity and Peer Support of Equality Bodies and B. Contributing to the European Equality Agenda)
- A **mission for Equinet** that captures the essence of the Network and key priorities for members (independence and effectiveness)

What has not worked so well? *Limitations, challenges, lack of results or capacity to implement...*

- Use of (output and impact) **indicators** for **monitoring and evaluation** under the annual work plans and strategic plan. Very difficult to measure at times, so need to reconsider indicators chosen.
- Implementation of the "Knowledge and Communication Hub" objective to an ambitious scale, largely limited by secretariat/staff capacity for communication work + Lack of capacity to develop and secure as well as monitor effective implementation of an ambitious Communication Strategy
- **Follow-up, dissemination and outreach of Equinet publications** and outputs
- Challenge: some **Working Groups** are becoming too popular with size of WG meetings becoming too large to be effective + Turnover in participation in some Working Groups can be high too.

- **Governance:** persisting challenge of attracting for Equinet AGM the Heads of members / National Equality Bodies and engaging with the leadership of members in our work
- **Internal communication tools (online/ website)** – in need of a restricted Members-only section on website or similar communication platforms that performs well and covers our main needs, namely to:
 - inform members about our activities, allowing for efficient registration, information sharing & reimbursement processes
 - Facilitate the work of Working Groups throughout the year, allowing for regular information exchange etc.
 - Inform members about governance issues eg. Board meetings, AGM , elections etc.
 - Reference library linking to all internal newsletters & other internal publications
 - Serve as a forum to allow members to exchange questions & requests in an easy manner, without having to go through Secretariat. This would usefully serve as a repository of such questions as well, so people could look back through questions & answers from the past.
- **Cooperation with stakeholders** implemented and operationalized in various places and forms under various Strategic objectives and areas for Action under the current Strategic Plan – resulting in some confusion or duplication in Work Plans.
- **Strategic objective D.** Consolidating the Network and the position of its Members: lacking clarity for implementation compared to previous other 3 Strategic Objectives (A-B-C)
- **Website:** outdated, no longer accessible or mobile friendly. A new website highlighting the work of equality bodies and Equinet (the latter particularly in thematic form) will be very welcome.

Updated Recommendations based on the Secretariat reflections before the 2014 strategic planning process:

Horizontal issues

1. ***Engage and involve*** all member NEBs, investigate why some member organisations are less active in the network.
2. Ensure that all members benefit from the network by developing activities taking into account the ***diversity of members***.
3. Ensure ***financial sustainability*** by securing stability and favourable rules for EU funding and by investigating alternative funding sources.
4. Increase efforts ***on dissemination, use and follow-up*** of outputs and events.

Executive Board

5. Explore methods for further enhancing and taking full advantage of the strategic capacity of Board members.
6. Ensure that Board meetings remain focused on strategic issues.

Secretariat

7. Clarify roles and tasks within the Secretariat and adopt detailed staff regulations on practical questions of employment.
8. Ensure individual and team capacity is appropriately prioritized to cover as much ground as possible
9. Find appropriate online project management tools that will make our work more transparent and accessible to everyone

Annual General Meeting

10. Clarify the main objectives of the AGM and ensure that its date is in conformity with Belgian legislation.

Capacity-building events

11. Introduce longer term planning for events, so that there is enough of a lead-in time to organize the event well, getting the speakers we want and the appropriate number of participants (harder to do if organized with less than 2 months lead-in time).
12. Experiment with new training methods, sizes, duration, etc. to accommodate diversity.

Working Groups

13. Consider the relevance of current WGs and possible need for setting up new ones.
14. Ensure involvement of WG members and increase interactions between meetings.
15. Identify how to manage growing numbers of members in WGs.

Internal Communication

16. Use staff members already engaged to disseminate relevant messages to all levels in NEBs.
17. Develop new website with Members-only section or similar communication platforms and make better use of these

External communication

18. Create communication strategies for each publication & make sure to follow them up.
19. Identify the main target audiences and create appropriate outputs for each to extend our outreach and successfully disseminate our work.
20. Evaluate the success of new more accessible outputs such as Factsheets & In Focus Briefs.

Stakeholder management

21. Seek and invest in long-term and sustainable partnerships with external stakeholders.

III. Strategic Issues for Equinet ahead identified by the Equinet Membership and the Board

Both the Equinet Board (at its meeting in September 2017) and the Equinet Annual General Meeting (11 October 2017) discussed the main opportunities and challenges in the coming years for Equinet and its members. The discussions aimed to identify strategic issues to be considered in the process leading up to Equinet's next strategic plan. The following key points were highlighted in these discussions.

CHALLENGES

For Equinet

- Public discourse hostile to equality groups and equality as a principle / equality as a value
 - Equality high on the agenda in both negative and positive sense versus lack of visibility of equality?
- Scarce resources
- Diverse needs of membership
 - Effectiveness of capacity building offered?
 - Penetration into members' structures?
- Relationship between equality and human rights
- Continuous and direct contact with members
- Communicating in swift, accessible and visual format

For Equality bodies

- Public discourse hostile to equality groups and equality principles/equality as a value
 - Equality high on the agenda in both negative and positive sense versus lack of visibility of equality?
 - Polarization of public discourse and international politics
 - Politically
 - Culturally
- Scarce resources
- Need for awareness raising and visibility
 - Visibility of link with EU Directives
 - Resources for PR campaigns from European level?
- Fulfilling multiple mandates
 - The relationship between equality and human rights
- Measuring impact
 - Data collection
 - Complaints?
- Address discrimination without being seen as prioritizing some over others
 - "New" groups in society feel they are victims of discrimination
 - such as white men or the dominant, Christian majority using the language of human rights to limit the rights of minorities
- Emerging fields:
 - Digitalization
 - Socio-economic status
 - Gender equality in changing world of work

- Youth unemployment
- Terrorism
- Communicating equality and non-discrimination in an accessible way
 - Provide information to public in short, non-legalistic way
- Weakened trust toward public institutions
 - Lengthy procedures
- Taking a strategic approach
 - In terms of policy, litigation, casework, etc. to move from reactive to strategic approach
- Provide evidence base for policy

OPPORTUNITIES

For Equinet

- Credibility and strong positioning
 - International partnerships
- Work on standards
- Solidarity in the network
- Use of new technologies to connect
- Relevance to EU agenda
- Equality as a question of rule of law
- Vision for Europe in politically unstable environment
- Value based communication and positive narratives
- International developments
 - Ratification of Istanbul Convention
 - EP elections
 - SDGs
 - Focus on hate speech in 2018
- Network changing: clusters may be good ways for those facing similar challenges to connect?

For Equality bodies

- Improvements in jurisprudence
- Expertize on non-discrimination and relationship with the courts
- EU support and commitment to equality
 - Versus lack of legislative equality agenda at EU level?
 - Versus need to engage with duty bearers nationally?
- Citizens' awareness of equality issues (younger generations) and citizen movements
- Positive narratives
- Network providing learning and solidarity
- New mandates (when reinforcing resources)
- Being an active partner in inclusive societies at a time of growing inequality
 - Link between sense of injustice and interest in radicalization?
- International partnerships

IV. External policy developments and priorities

The following is a non-exhaustive list of external policy developments and priorities, at EU and international level, that are proposed to be taken into account while developing Equinet's new Strategic Plan for 2019-2022. The items on the list are in no particular order of priority or importance.

Legislative

- **EU Multi-Annual Financial Framework**
 - The new MFF is currently under development, with a first draft expected from the Commission in early May. A possible decrease of resources overall and shift of priorities is expected (defence, border control, research and youth unemployment seemingly prioritised)
- **Horizontal Directive**
 - Directive proposed in 2008, blocked in Council
 - Priority file for Commissioner Jourová but in the face of little progress she is considering to propose enhanced cooperation, whereby MS willing to advance on this could do so without others (min. 9 MS needed for this)
- **Charter of Fundamental Rights of the EU**
 - Equinet organised a conference in 2015 but otherwise struggled to engage members on this
- **Women on Boards Directive**
 - Directive proposed in 2012, blocked in Council by several MS based on subsidiarity concerns and proposing rather non-binding measures
- **Work-Life Balance**
 - Proposed WLB Directive (2017) currently in front of the co-legislators
 - WLB initiative with non-legislative actions
- **Violence against Women**
 - Istanbul Convention, planned EU accession
 - Victims' rights Directive
 - ILO instrument on violence against women & men in the world of work being negotiated
- **European Accessibility Act**
 - Negotiations between Council and Parliament ongoing on this important legislative instrument which takes an internal market and goods and services approach rather than a rights-based one
- **Freedom of movement of EU workers and their families**
 - Directive 2014/54/EU, equality bodies appointed as monitoring and assistance bodies in the majority of Member States
 - Equinet Cluster to be set up in 2018
- **UN CRPD**
 - A number of equality bodies appointed as independent mechanisms to promote, protect and monitor implementation
- **Age discrimination against older people**
 - UN Open-ended WG on Ageing

- **Standards for equality bodies, equality bodies as good practices**
 - ECRI GPR No.2.;
 - Planned European Commission Recommendation
 - UN OHCHR interest, including potentially in promoting equality bodies outside Europe
 - European External Action Service (EEAS) and TAIEX (the Technical Assistance and Information Exchange instrument of the European Commission) interest in spreading equality body good practices and standards outside EU borders
- **UN Sustainable Development Goals**
 - The 2030 Agenda for Sustainable Development and the Sustainable Development Goals were adopted by the United Nations General Assembly on 25 September 2015. 17 SDGs, 169 associated targets which are global in nature, universally applicable and interlinked.
 - The EU launched a multi-stakeholder platform on SDGs; Eurostat is monitoring progress
- **European Pillar of Social Rights**
 - Adopted in November 2017, providing the framework for EU action in the field of economic and social rights
- **Increasing focus on communicating about equality and human rights**
 - See e.g. 6 March 2018 event organised by CoE Commissioner for HR, FRA, UN OHCHR and ENNHRI
 - Equinet has done considerable work on values-based communication & framing equality, giving us a good position to support any work on this
- **EU Framework of National Roma Integration Strategies; List of Actions on LGBTI equality; European Disability Strategy; Strategic Engagement for Gender Equality**
 - All these EU sectoral policy strategies will come to an end in either 2019 or 2020 and their future or replacement is less than certain at the moment
- **Gender Pay Gap**
 - EC Pay transparency recommendation (2014)
 - EC Action Plan to combat GPG in 2018-2019
 - EIGE Gender Equality Index
- **Hate crime and hate speech** (including online)
 - Public discourse hostile to equality groups and equality as a value;
 - FRA-coordinated subgroup of the High Level Group to combat racism, xenophobia and other forms of intolerance, focusing on recording and reporting of hate crime;
 - European Commission Code of Conduct on countering illegal hate speech online (2016), and Recommendation on measures to effectively tackle illegal content online (2018);
 - European Commission coordinators on anti-Semitism and anti-Muslim hatred (appointed following the 2015 Annual Colloquium on Fundamental Rights);
 - Cooperation Platform on hate crime and hate speech (with the CoE, FRA and ENNHRI, currently dormant);
 - ECRI GPR No.15
- **Integration / Inclusion of migrants, refugees and asylum seekers**
 - Focus at EU level from a migration management angle, likely to be a priority under the new MFF

- **EU enlargement**
 - Commission strategy on 'A credible enlargement perspective for and enhanced EU engagement with the Western Balkans' (adopted in February 2018) with a target date of 2025 for Serbia and Montenegro
- **Diversity Management, involving businesses**
 - Diversity Charters supported by the European Commission (currently in 18 MS) as a way of promoting self-regulation

Socio-economic environment

- **Digitalisation / automation / AI**
 - The importance of these developments and their implications for equality and non-discrimination have been discussed with the Board before. Implications could include the use of algorithms to a discriminatory effect; leaving behind the less tech-savvy or low-skilled workers; increase of cyber hate and cyber-crimes, etc.
- **Low levels of political support and leadership on equality issues in a number of European countries, use of anti-minorities rhetoric for political gains**
- **Statistics show recovery from the economic crisis, but some groups do not benefit from this**
- **High levels of youth unemployment and disenfranchisement from society**

EU level developments and events

- EP elections and new European Commission in 2019 (mandate 5 years)
- European Commission Annual Colloquium on Fundamental Rights
- FRA Fundamental Rights Forum biennially