

# EQUINET: Strategy Day

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*Report of the strategic planning day at Hotel Du Congrès (Brussels), Brussels on 14 March 2018*

## Background to the Away Day

EQUINET's board agreed a strategic planning process at its meeting in February 2018. This process includes: an internal reflection report; the present planning day; consultation with members and selected stakeholders; drafting and consulting on an outline Strategic Plan for 2019-22; development and adoption by board; and final sign-off at AGM planned for November 2018. The present Strategic Planning day is therefore a critical moment to examine and reflect on past performance and define ambition, key priorities and objectives for the coming years.

Thus, the focus of the Strategic Planning day is for key personnel to reflect on EQUINET's successes and to propose ideas that align with its emerging ambition for the future. The objectives of the day are to:

- Take stock and give due consideration to the Secretariat's preparatory report on the learning from past evaluations, the current operating environment, ideas and suggestions that they have gathered, policy trends and so on
- Reflect on the experience of the past few years in terms of EQUINET's successes and challenges
- Consider the most relevant external signals
- Reflect on participants' ambitions for the years ahead
- Check in on how those ambitions may impact on the vision and mission for the organisation
- Identify key objectives and priorities for the next Strategic Plan period, and
- Agree practical next steps and implications for the agreed planning process

## Expectations of the Strategy Day

We'd like clarity about:

- Where EQUINET is going
- Our level of ambition for the future
- The global picture in our working environment
- Whether how we work needs to change
- The direction: what our priorities are, the 5-6 goals
- How we manage the growing needs of a growing membership with a fairly fixed and small secretariat

We'd like to ensure that we also build upon the past

We'd like to ensure that our day is:

- Participatory
- Concrete
- Doesn't get into too much detail

## **Flipchart notes from the morning small group work on achievements and concerns from the current strategic planning period**

### **Group**

#### **Positive Achievements**

- Working Group participation and experience exchange
- Quality of the work of the Secretariat
- Positioning of EQUINET on equality bodies (spreading knowledge and support)
- Support to equality bodies in a challenging situation
- Good organisation of events
- Usefulness of small events/groups (ie more useful than the larger events)

#### **Negative/Concerns**

- Positioning of equality bodies in respect of ENNHRI and national human rights bodies
- Limited gains in respect of moving the new legislation forward
- The workload demands from members
- Very heavy surveys for members, with little apparent follow-up - information can perhaps be provided to the Secretariat in a different way
- There is a need for more good practice examples with specific information
- High-cost research projects - pointing to the need to choose the topic very carefully
- Dependence on the European Commission (both financial and policy dependence)
- Focus: make sure that all submissions are acceptable for members

### **Group**

#### **Positive Achievements**

- Expertise
- Mutual learning
- Peer support and solidarity
- Team spirit in the network
- Strengthened digital tools
- Strengthened stakeholder relationships

### **Negative/Concerns**

- Engagement of EQUINET with EBs limited to 2-3 people in each case (webstream capacity building)
- the number of events may be too high. Stability in capacity building. Should we diversify in the level of training - more junior staff as well as the senior ones?
- Impact evaluation - EQUINET and the EBs
- Funding: retain control of ?? and ensure stability
- Relationship between equality and human rights - that is the positioning of EBs and equality
- Standards: Indicators - are they were we want them to be?

## **Group**

### **Positive Achievements**

- Positioning at the EU level: equal treatment = EQUINET - ECV
- Capacity building: the working groups have delivered smaller practical work, but needs to continue to deepen their reach within members and be specific to the needs of individual staffing
- Internal communication: the website needs to be improved
- Standards: we need to implement now
- Publications - generally give good overview of members' work and their expert voice

### **Negative/Concerns**

- Institutional cooperation: not just based on good personal contacts - remember there are elections and the Commission will change
- Communicating efficiently on equal treatment and the values of EQUINET

- We need procedures on how to respond to the political environment: members need to know what steps to take and avenues for action
- Publications: need more preparation time with greater clarity about the target audiences, the format to reach them, how the publication will be promoted, etc
- Priorities for small groups (working groups, projects and clusters)
- Study visits to see how some members implement their work well
- Internal communications: missing information on developments at national level (use to be requested regularly). recent priorities, developments, etc and we should make it an obligation monthly, to provide updates

**For the future:**

- Capacity building
- EU positioning
- Communicating equal treatment

**Group**

**Positive Achievements**

- Developing and strengthening the equality infrastructure, especially in relation to standards
- Positioning and credibility of EBs
- Production of strong and useful resources
- Strong engagement of a few members (old and new)
- Our current strategic goals - the words matter and it has been a model for many
- Our trainings: the communication, media and format

**Negative/Concerns**

- While good and strong, the mission needs refinement and greater clarity
- The support for EBs is under threat
- Our communication tools are unclear - need better external positioning to engage EBs and dissemination with EB staff
- The use of impact indicators as measuring and learning tools
- The use of technology in general and the online members' forum in particular

- We need to build the new narrative
- A database of good practice

## Summary plenary discussion of the morning small group sessions

### What has EQUINET achieved in the last strategic planning period and what is our strategic situation right now?

1. What has EQUINET done well over the past four years (both concrete achievements and approaches/methods)?
  - We have grown
  - We have fostered the unique identity of equality
  - We have helped build the capacity of EBs
  - We have developed a stronger role at the EU level
  - We have achieved an ECRI recommendation
  - We have focussed on standards
  - We have done good work on training and in the clusters
  - We have supported EBs in a range of situations
  - We have developed our communication skill
  - We have strengthened our key relationships both institutionally but also at the individual level too
2. What has not gone so well over the past four years? What causes us concern?
  - Our reach into EBs, to the more junior staff, has not deepened enough
  - We are still overly dependent on one funder
  - There is more work to do on positioning Equality compared with Human Rights and EQUINET compared with ENNHRI
  - Our institutional relationships are still too dependent on too few key individuals who may move on
  - It has been hard to build our narrative
  - We have at time hit the limits of our limited secretariat capacity
3. Discussion: so, Where are we now?
  - At this point, there is significant potential, not least due to the platform that the work on Standards gives us
  - Because the impact of our work is hard to measure and to see, it's hard to know where exactly we are, but where we are certainly feels a better and stronger place that four years ago, despite the adverse political climate in relation to our topic.
  - We understand too what EQUINET is, which is different from EBs - our role and input is less direct, more subtle.
  - There is therefore something of a dilemma: should we be more vocal?
  - But certainly our focus should continue to be to focus on our members
  - In short, this seems to be a critical moment: there are some great opportunities and some significant threats

## Flipchart notes from the afternoon small group work on the priorities for the next strategic planning period

### Group

1. Peer support - capacity building of equality staff. Increased knowledge of EB staff, so that EB staff regularly use the resources of EQUINET. EB staff are recognised as equality experts in national and eu level (through peer support)
2. Contributing to the EU equality agenda (including international)
3. EQUINET's unique and added value
  - Contributing to communicating the benefits of equality (in a positive way), including research
  - EQUINET as a think tank on equality, EQUINET as a key player in equality
  - Communicating values
4. Reinforce the position of EBs through the network
  - Sustainable and independent EB members
  - Support accreditation system for standards - and evaluating impact

### Group

#### Points:

- Capacity building, engagement with policy-makers as well as with civil society, ie informative communication about discrimination and equality addressing the legal void concerning the digital tools
- Internationalisation of EBs and engagement with stakeholders at EU level
- Influence in EU jurisprudence/strategic litigation
- Methods (including digital) to share good practice
- Awareness raising about EU initiatives
- Diversify the funding resources
- Clarify the specificity of EQUINET vis-a-vis human rights bodies and ENNHRI

#### Objectives:

- Standards implementation
- Gaining influence in EU/CoE jurisprudence and policy making/legislation

- Achieving better financial stability/sustainability
- (Promoting EBs as good practice internationally)
- Capacity building
- Increased communication, exchanges, with, for and about EBs

#### Group

1. Strengthen the implementation of EU equal treatment legislation at national level and support EBs to implement their own mandates >> capacity building
2. Voice of NEBs at the EU level
3. Promote equality in European values
4. Promote EB members (equality, infrastructure, HR)

#### Group

- Stronger support for members - overcoming national blockages, stronger connections between national and EU levels, EQUINET as a brand for equality and equal treatment, both within the sector and beyond
- Policy agenda at EU level: Equality discourse and the positive narrative - ensuring the counter-narrative story is communicated - building the story with cases, positioning and messaging + more influence at the EU level
- Strengthening the European Equality infrastructure - financial resources, implementing standards and benchmarking capacity
- Equality data research and measuring equality

### Discussion on immediate next steps

There was insufficient time to have a summary plenary at the end of the second small group session, so the consultant committed to summarise and develop with the staff after the strategy day

The strategy day concluded with agreement that the Secretariat along with the consultant would draw up a working draft of the next strategy for consultation amongst workshop participants and others, per the strategic planning process, already agreed by the board.