



Transform Management Consultancy  
Brookside  
Adforton, Leintwardine  
Herefordshire, SY7 0NF  
UK

T: +44/0 845 862 5247  
F: +44/0 870 051 2234  
E: [admin@trans4mgt.com](mailto:admin@trans4mgt.com)  
[www.trans4mgt.com](http://www.trans4mgt.com)

---

# Equinet– European Network of Equality Bodies

---

## External Technical Evaluation of 2014 Activities

### *Report*

### Contents

1. Introduction .....	2
2. Data .....	7
3. Analysis.....	40
4. Final Reflections: Towards Equinet 2.0? .....	45
5. Appendix .....	49

February 2015



## 1. Introduction

### This report

This report represents the findings and conclusions of an external evaluation consultancy commissioned by Equinet of its activities during 2014 for its key funding stream, PROGRESS, a fund of the European Commission's DG Justice.

### Evaluation Objective

During the discussion process for the evaluation, Equinet made clear that the proposed technical evaluation was not only to fulfil the requirements for evaluation under the terms of its PROGRESS funding, but that it also wished to deploy the findings to help reflect on its recent strategic planning round, completed during 2014. By seeking the views of members and other stakeholders on a confidential basis, one may ascertain, it is hoped, the key issues for them that Equinet should address during the new strategic plan period.

Thus, this evaluation report seeks to assess the areas of interest and make appropriate recommendations for consideration.

### Equinet

Equinet was established legally as an international not-for-profit association (Aisbl) in 2007. Its Secretariat is based in Brussels. Equinet has been funded through the European Commission's PROGRESS programme, the objective of which is to strengthen the EU's contribution to support Member States' commitments and efforts to create more and better jobs and to build a more cohesive society. This funding programme came to an end in 2014, and the details of its successor funding instrument are now being implemented.

Equinet's 2015-2018 Strategic Plan proposes four key objectives:

- 1) Building capacity and peer support of equality bodies.
- 2) Contributing to the European equality agenda
- 3) Serving as a knowledge and communication hub on equal treatment
- 4) Consolidating the network and the position of members

There is continuity between this strategic plan and the previous one, Equinet's first. The themes of capacity building and support for members, being a centre of expertise and acting as a policy interlocutor between the sector and European Union institutions were amongst the ideas of the previous plan.

## PROGRESS Funding Requirements

Assessment of Equinet's success in fulfilling the requirement of its grant under PROGRESS requires the development of a logframe, conforming to the overall PROGRESS logframe. In this case, Equinet has adopted five Outputs and four Immediate Outcomes, each of which has its own performance measures. Some, but not all, of these performance measures require the input of an external evaluation (i.e. this evaluation report).

The methodology behind the survey for this evaluation, our assessment of Equinet's documentation and our meetings with Equinet's members and staff were all designed to assess these performance measures, while offering Equinet an overall assessment of its current strategic position.

## Factors informing our Approach

Organisations of a similar nature and working in a similar way to Equinet share certain characteristics that inform our approach to this technical evaluation. Membership organisations, interlocutory organisations and supra-national organisations are all inherently complex to manage – and Equinet is all three!

Typically for **membership organisations**, there is a tension on the one hand, between representation and using democratic approaches to decision making and, on the other hand, arriving at efficient means by which to direct and control the organisation's actions. Dysfunction can occur either when the need for full consultation slows effective executive action, or when overly hasty management action undermines proper accountability by the governing bodies. In our experience, membership organisations have to arrive at their own unique approach to managing this tension in order to develop more appropriate decision-making processes.

**Interlocutory organisations** are also complex to manage. Simultaneously meeting the needs of member bodies for information, support, etc, while also meeting the needs of the major funders, such as the European Commission, for a high level of credible political insight can be challenging to combine successfully. Given limited resources, it is easy for both parties to feel dissatisfied without careful stakeholder management.

A further challenge arises from this. It is inherently difficult for organisations such as Equinet to demonstrate the impact that its work has. Attributing a change (for example in policy) to Equinet's efforts is not easy unless those affected by Equinet's work admit to its influence. This problem impinges directly upon the thinking behind the proposed methodology: Equinet's reputation amongst key stakeholders can be used as proxy indicators for impact<sup>1</sup>.

---

<sup>1</sup> Burns, S (2000) *Outcome monitoring* Charities Evaluation Services, UK

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

**Supranational organisations** are complex to manage because their ‘reach’ is so broad. The reality of geography, national and managerial culture differences, as well as language, make the basic running of the organisation and all its interactions more complex. The wide range of political interests of each of its members will also create an essential tension in the sense of pleasing one member or group of members may lead to the displeasure of others.

## Method

The agreed method for the evaluation comprised three stages (Table 1).

In slightly more detail, this process involved the following **key activities**:

### Stage 1: Engagement

- a. Review all documentation provided by Equinet, including relevant planning, funding, internal and external reports, etc
- b. Agreement of an interview protocol and the content of a short online survey

### Stage 2: Data Collection

- a. Preparation for and input to a briefing session to the staff, and the observation of one Steering Committee meeting
- b. Administration of a short online survey on the perceptions of effectiveness and impact to each of Equinet members and other key stakeholders

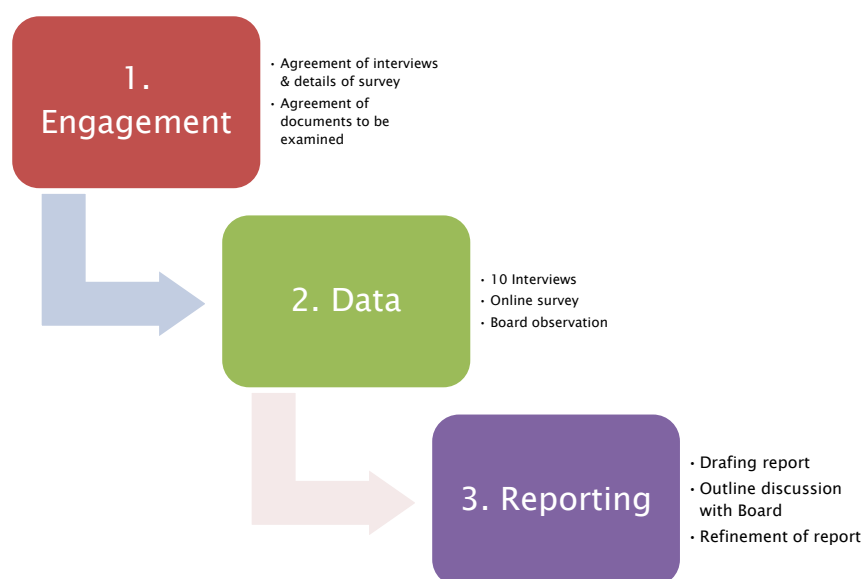
Interviews with a small sample of Members’ representatives and staff members by telephone and in person (8 planned, 13 carried out: 8 members and board members, 4 staff members and the board advisor)

### Stage 3: Reporting

- a. Analysis of data and preparation of a narrative report for discussion with the Executive Director and dissemination for consultation to the Executive board
- b. Final revisions to report, with recommendations, for presentation to PROGRESS

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

Table 1: Outline Method – Three Stages



The data collection process started in December 2014, with observation of the End of Project Conference, and continued, with interviews and an online survey throughout January, while the draft report was completed in early February 2015. The final report of the external evaluation is to be completed for submission as part of Equinet grant final reporting to EC by end February 2015.

### Questions asked in the Survey and Interviews

The online survey had the following structure of thirteen questions:

First, after two background questions, questions about **from a strategic standpoint...**

1. Reflections on the strategic planning process and outcome (the strategy itself)
2. Equinet from a work delivery or quality standpoint
12. Network decision making effectiveness

...next, two questions **from a service delivery standpoint...**

2. Equinet's overall offering
3. The timeliness, accuracy and usefulness of Equinet's key outputs

...then, the questions pick up the **'key impact indicators'** proposed in the new strategic plan, namely...

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

5. Perceptions of Equinet's ability to enhance member effectiveness
6. Perceptions of Equinet member's ability to engage at the EU level as a result of Equinet's work
7. Perceptions of the impact of Equinet's policy work and legal documentation
13. Equinet's strategic positioning with key actors

...and finally the questionnaire asks questions **from an organisational standpoint**:

8. Governance performance
9. Funding sustainability
10. Efficiency of key administrative functions
11. Staff and management performance

External stakeholders had a subset of the seven most relevant questions (i.e. excluding the management questions), while the interviews took a subset of these questions to try to use the scarce interview time to the best effect.

Again, the topics considered and the questions developed to seek evidence on them were not exactly the same as the previous year and thus comparison between the two years is limited.

### Online Survey

There were 68 responses to the online questionnaire (66 last year and 67 the year in 2012) which was sent to Equinet's members (43 completed returns) and a sample of other stakeholders (25 completed returns). Most EU and accession states were represented in the responses, along with a number of voices from EU level institutions and some NGOs. 63% of respondents who answered the question were members of Equinet and the remainder were external stakeholders.

### Interviews

Twelve interviews were carried out (13 in 2013, ten in 2012), following a pre-agreed interview protocol, with a selection of seven members and board members, two members of Equinet staff team, two voices from the Commission and one NGO leader.

### Report

This report provides a fairly lengthy exposition of the data from the survey and interviews in order that Equinet can use the data for its own analysis. However the core of this report is quite short comprising the Executive Summary (at the



beginning of the report) and the Analysis and Final Reflections sections (at the end of the report).

## 2. Data

### Introduction

The presentation of the data follows the structure of the survey (and interview protocol) in terms of topics and questions within each topic. Conclusions are drawn later in the report.

### Equinet from a Strategic Standpoint

#### New Strategic Plan

Equinet has a four-year planning cycle in which the strategic plan is revised every four years, while it produces an annual Work Plan and budget for approval by the AGM each year. The annual Work Plan mirrors the strategic plan in that it takes each of the strategic planning objectives and considers how they will be operationalised in the year ahead. The annual Work Plan specifies exactly what learning and other events, publications, etc will take place in the year ahead.

These processes are all signs of good practice and a well-run organisation.

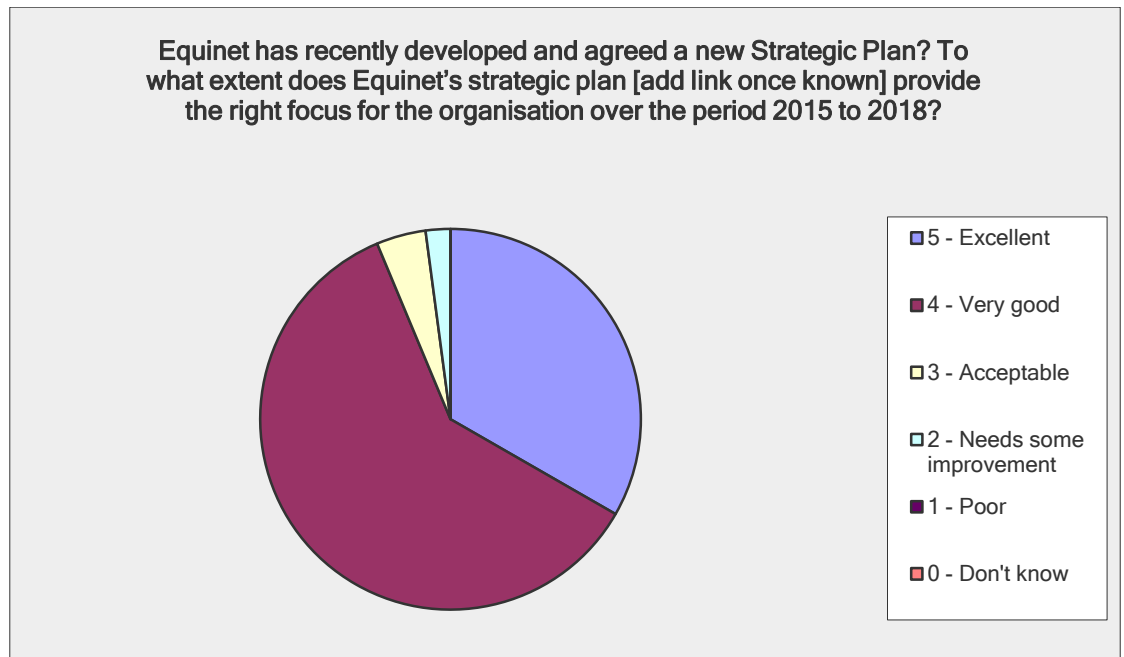
**QUESTION 1: Equinet has recently developed and agreed a new Strategic Plan? To what extent does Equinet's strategic plan provide the right focus for the organisation over the period 2015 to 2018?**

#### Statistical scores

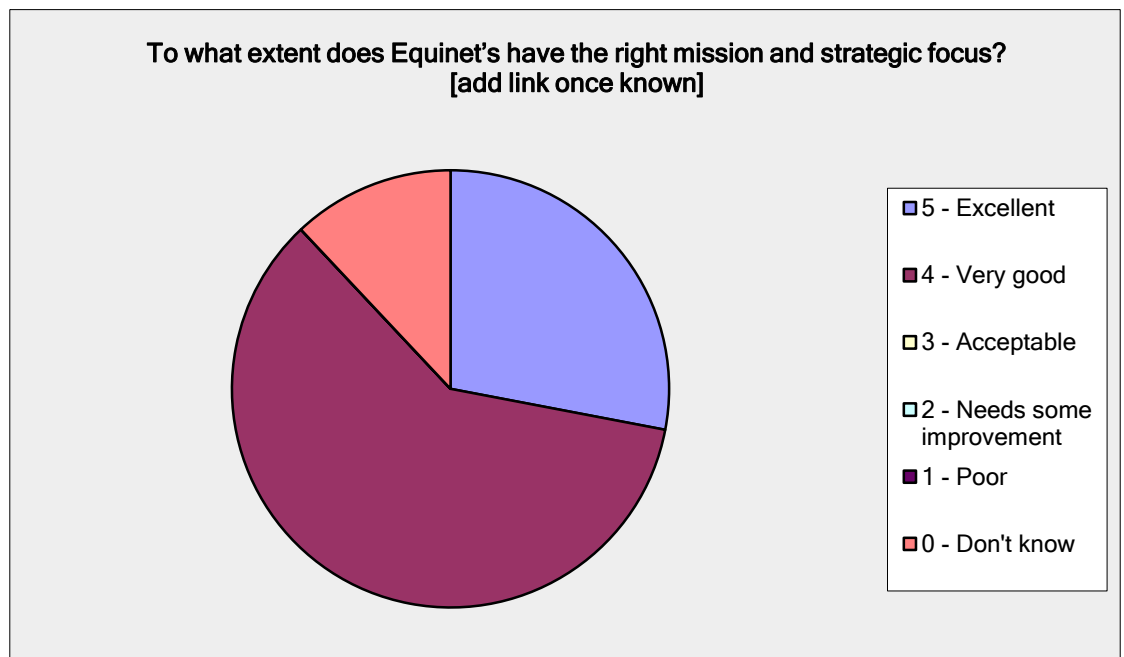
There were 48 responses from members.

3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET



And to a similar question to external stakeholders, the [25] responses were as follows:



Survey remarks - Members

- We welcome Equinet's strategic priorities and feel they are right and they align to our work, particularly around capacity building and sharing as we need to reach more people with fewer resources. Budget cuts and limited resources are one of the main problems faced by all equality bodies. Following on from our point on capacity building, there needs to be a greater emphasis on impact. [EB Name] has a strategic focus on impact. For





## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

example, in [Named Publication] our review took into account a series of factors in identifying the key challenges for our country. For example, we considered how many people an issue affects, and how it impacts on their life chances. In some cases, a disadvantage may be rare, but its impact will be so severe that it needs to be tackled, irrespective of the small number of people involved. Equinet could take the lead on assisting Equality bodies to assess impact, so helping with objective D. consolidating the network and its members and Equinet also needs to show how their work makes a difference practically.

- Since the strategic plan was drafted after consultation with equality bodies at various stages of the process, [EB Name] understands that the new Strategic Plan addresses the needs of equality bodies in line with its mission statement.
- Thanks to the wide range of external and internal consultations, which was of great importance.
- The Plan provides valuable focus for work at European policy level and for work to support national equality bodies at strategic level.
- This new strategic plan is a perfect mix of continuity and innovation, and is targeted to the realization of the basic missions of Equinet as a network from and for Equality Bodies.

## Survey remarks – External stakeholders

- I do not follow the work of Equinet because too general; does not address the specifics of my work area – advocacy for the rights and social inclusion of persons with visual impairment.
- The strategic focus is determined in close consultation with members.
- Equality Bodies are recently established organisations in many states, requiring peer to peer support and networking in order to develop expertise and strategies. Older EBs have experienced radical changes. Equinet's mission provides support and facilitates networking effectively to both types of EBs.
- I can't remember the mission at present, but they're doing great work
- This question is not phrased well; there is more than one response and the English is poor.
- In the context of a number of Brussels based NGOs working with fundamental rights and more specifically non-discrimination and equality, Equinet fulfils its specificity and its mission very well, by always linking and relating to the equality bodies' work, needs and interests.

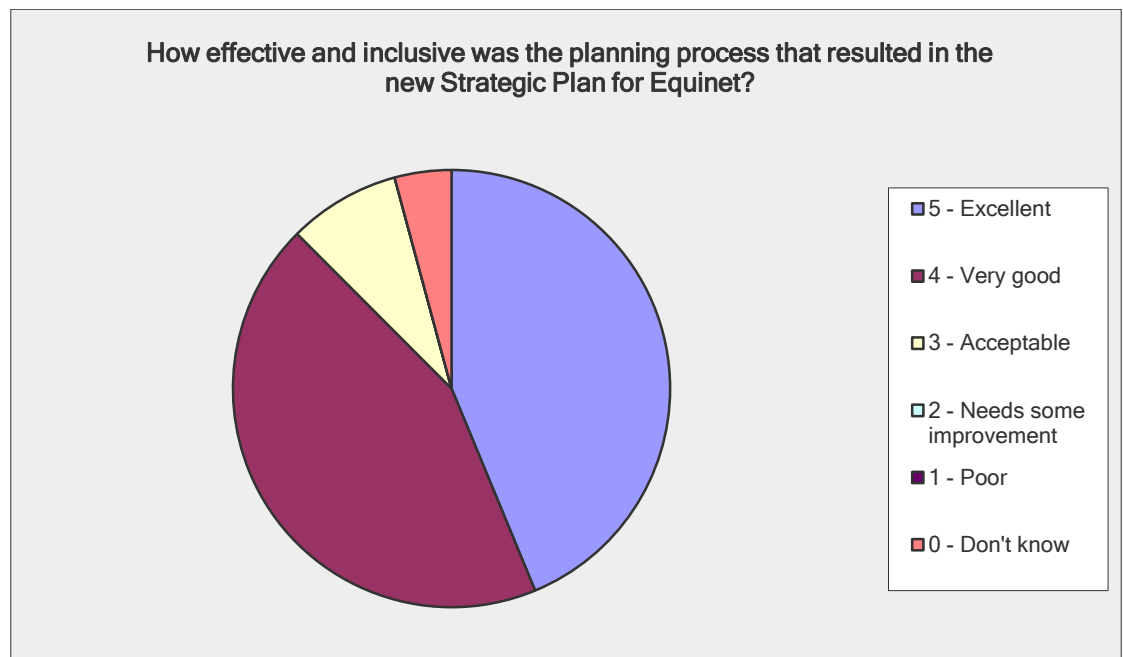
## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

## Strategic Planning Process

**QUESTION 2 (for members only): How effective and inclusive was the planning process that resulted in the new Strategic Plan for Equinet?**

## Statistical scores



## Survey remarks – Members only

- There was the opportunity to contribute with sufficient time. There was the opportunity for our Chief Executive [name] to discuss the Strategic Plan with Evelyn Collins, Chair of Equinet.
- Its effectiveness is directly linked to the consultation that was carried out throughout the planning process to compile information on members' priorities and needs, to be taken into account when drafting the Strategic Plan. A note [synthesising the results] of the consultation process was sent to equality bodies, and we were also given the opportunity to comment and express our opinions and feedback on the draft plan.
- The [EB Name] Commissioner was not part of this process as it only became a member of EQUINET during the End of Project Conference held on 4th December 2014.
- I had an opportunity to participate in common discussions as well as bilateral discussions with the chair. The plan was also discussed within my own office. Feedback was well received.
- Very inclusive – I was impressed by the inputs sought and provided by members equality bodies through survey, through Working Group discussions and through individual engagements undertaken by the Board members with senior representatives of equality bodies

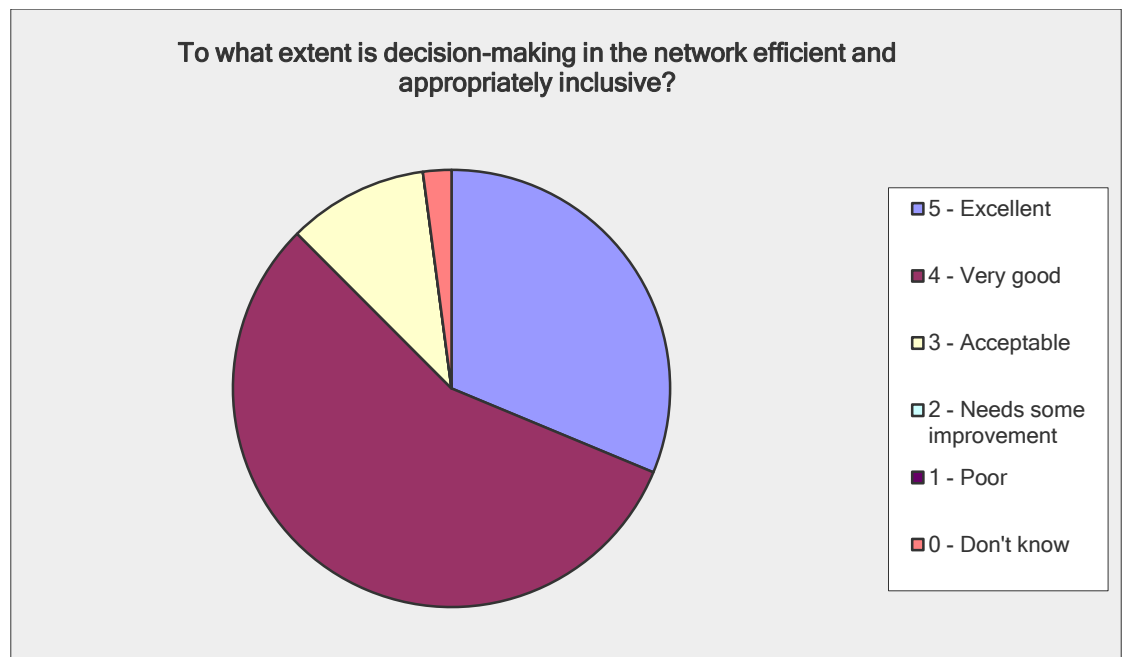
3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- A systematic feedback on the proposals sent in and as to if or how they have been taken on board would have been desirable, although given the number of stakeholders and the limited human resources of Equinet its understandable that that did not happen.
- There were several occasions for input and reflection, and by different means: written, oral, ...

**QUESTION 12 (Members): To what extent is decision-making in the network efficient and appropriately inclusive?**

Statistical Scores



Survey remarks

There were five responses to this question and they can be represented in the following way.

- [EB Name] is involved in the decision making of EQUINET, through AGMs, consultation documents etc. Inclusiveness depends on the extent to which all stakeholders are taken on board.
- Good communication mechanisms mainly through email leads to this efficiency and inclusiveness.
- As noted earlier, the structures and procedures for governing Equinet have worked very well to date, given the very complex terrain – especially the wide geographical and organisational diversity – on which it operates
- A very democratic organization with key decisions being taken at AGM and others progressed by elected Board

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- See reflections on the new strategic plan, as a good example of the inclusive character of the network.

## Equinet from a Service Delivery Standpoint

## Equinet's Year in 2014 at a Glance

Here are some simple statistics to give a hint of Equinet's production and the cost at which it was delivered.

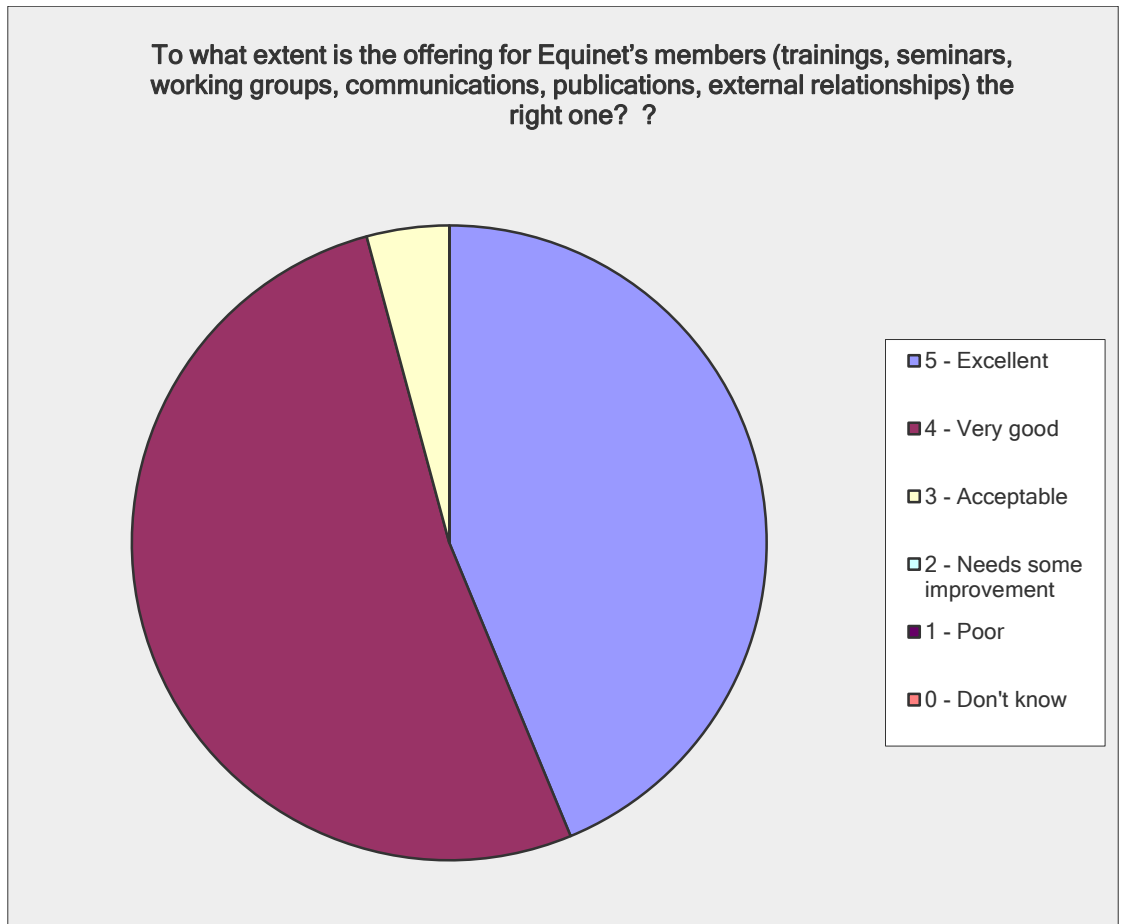
Item	Volume (2013)
Reports published	8 (8)
Promotional materials issued	7 (14)
Unique website hits per month	1578 (1398)
Training and other learning events	5 (13)
Average attendance at the training and learning events	73 (27)
Communications events	2 (3)
Participation in the Communications events	49 (79)
Gender balance at learning and communication events (women: men)	69:31 (83:17)
Meetings of the five Working Groups	10 (10)
Average number of participants at each WG	21 (20)
Steering Committee meetings planned and held	5 (5)
Size of Secretariat (permanent employees)	6 (6)
Expenditure	€947k in 2014 (€944k in 2013)

3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

**QUESTION 3 (Members): To what extent is the offering for Equinet’s members (trainings, seminars, working groups, communications, publications, external relationships) the right one?**

Statistical Scores



Survey remarks in answer to the question: Can you think of any improvements to meet the needs of EQUINET’s diverse members better?

The 15 comments can be listed as follows with the number of mentions that each topic received next to it in brackets.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- There is the potential to have speech to text reporting services available at training, seminars and working groups. This can help audience members who have English as their second Language. Seeing the written word as a backup can be beneficial. There is also the potential to run webinars for the purpose of partnership working, external relationships and the sharing of information efficiently.
- Equinet tried to implement many of the suggestions
- [EB Name] regularly attends trainings and seminars and is also represented on EQUINET's working groups. To this end, it is important for [EB Name] that EQUINET continues to provide the opportunity to all equality bodies to participate in initiatives that address subject matters which are common to most equality bodies (such as communications, investigations of complaints etc.). Besides, EQUINET can also develop other initiatives targeting specific equality bodies on subject matters that deal with their specific needs and circumstances, hence taking into account the diverse and specific needs of its members when possible.
- The [EB Name] has not been part of the offerings for the EQUINET Members such as training, seminars etc. But it should be emphasized that the [EB Name] has been part of the workshops held during the EQUINET Annual General Meeting since 2011. These were very effective and useful for CPD.
- Maybe it would be nice to intensify follow-up activities after the trainings and seminars.
- A development is also under way to more than before tailor the meeting forms and working methods to the needs of the member organizations.
- Important is that also more experienced equality bodies participate as to enable others to benefit from their experience.
- It would be useful possible gathering of priorities of the needs of each member in different activities in order to better plan the realization of the activities.
- Trainings and seminars dedicated to junior and senior staff.
- There are still issues about language which we have yet to resolve – to ensure full and effective engagement by those not so fluent/capable in English. No set ideas on how to improve this but think we should work on this in coming period
- Equinet seminars are always interesting and a nice way of educating yourself.
- The aspect of promoting peer cooperation included in the Strategic Plan seems promising.
- Improvements are of course always possible, but also here, the strategic plan is proposing a number of initiatives to target the different needs of different members. The whole point will be how much attention is given to this new ways of working, not at least by the members of Equinet themselves. The Equinet-secretariat has a responsibility to stimulate and facilitate active participation by the members, but the final responsibility for active participation lies with the members.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- Subgrouping working groups into smaller groups within their meetings in order to address specific issues relevant for various members, if there is a need (e.g. for some members of WG Equality Law under-reporting can be an issue within a selected problem area and for others it can be the burden of proof or other).
- More offering on the issue of multiple discrimination.

**Interview comments - Members**

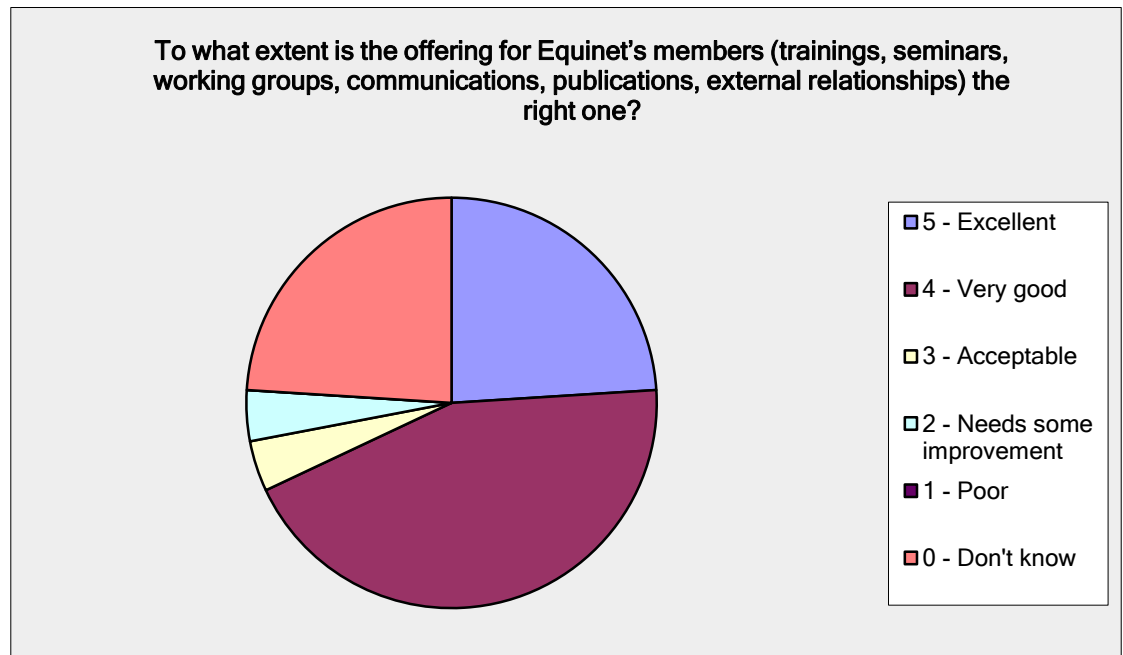
- We are doing quite well, but some activities could be improved. Some working groups are effective; others less so. Language is a key issue – we do great publications but they are not easily accessible by most people and there is not budget within EBs for translation.
- We are a new member, but having observed some of the meetings, we can see that the offering is attractive and helpful for our work.
- One of the great advantages of Equinet is that it is the only institution to provide training for EB staff – to a high standard. The challenge is the diversity of the membership and the need increasingly to differentiate between the needs of the various subgroups of members' staff, eg junior staff and senior staff, younger organisation and more established organisations, etc. There is also a need for non-legal training, eg in communications, education issues, etc. So, the programme needs a little tweaking, as well perhaps as better marketing.
- The programme of activities is good and differentiated sufficiently, but it needs to attract more senior level people to make the contributions on them.
- The key value we see from our membership is EQUINET as a community of practice. As the years go on, we need to be much more strategic in our use of EQUINET's offerings, and ensure staff's training needs are really met by the inputs
- EQUINET has matured greatly over the years, and, for me, the key issue is meeting the diverse needs of members, and the different levels of understanding. This is the work to improve on, in terms of innovation and improved quality of the inputs

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

**Question 3 (External Stakeholders): To what extent is the offering for Equinet's members (trainings, seminars, working groups, communications, publications, external relationships) the right one**

Statistical scores



Survey remarks

There were 7 sets of comments.

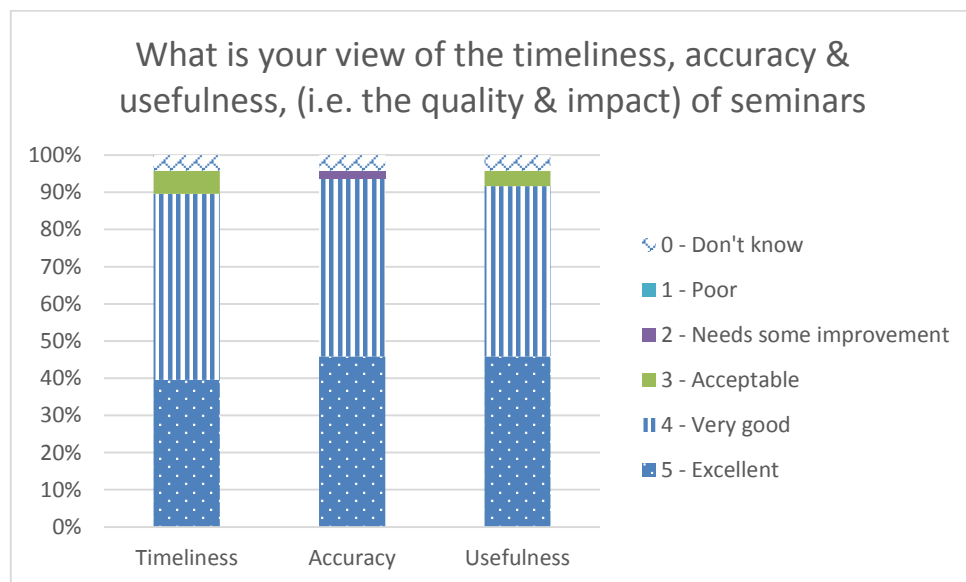
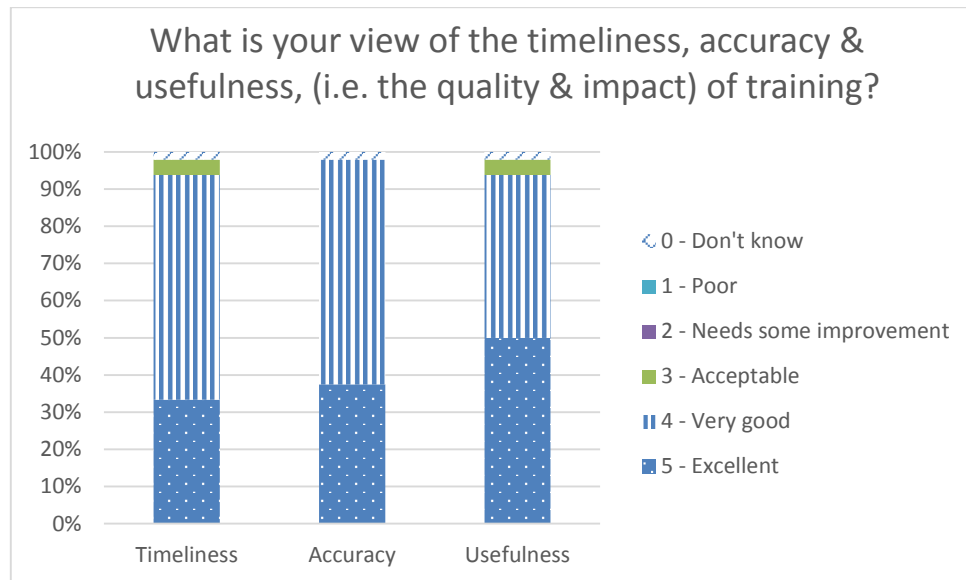
- Trainings and seminars are particularly up-to-date.
- I would propose to use new technologies more frequently and to increase for example webinars and to develop joint action plans and to find synergies also to find the right spaces to develop impactful external relationships
- EBs have limited staff and capacities to cover all the above mentioned services internally. Equinet's activities are therefore much appreciated. However these activities can be carried out only with the active participation of Equinet's members.
- Please note that I am not a member, and I cannot judge. However, the quality of products is high.
- What do you want to know? Is the MIX of activities adequate for the needs of the members? Or which of the activities should be included / excluded or receive more attention?
- As an external stakeholder, I don't know about the full extent of what is provided for Equinet members.
- I'm not a member so I couldn't say.



REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

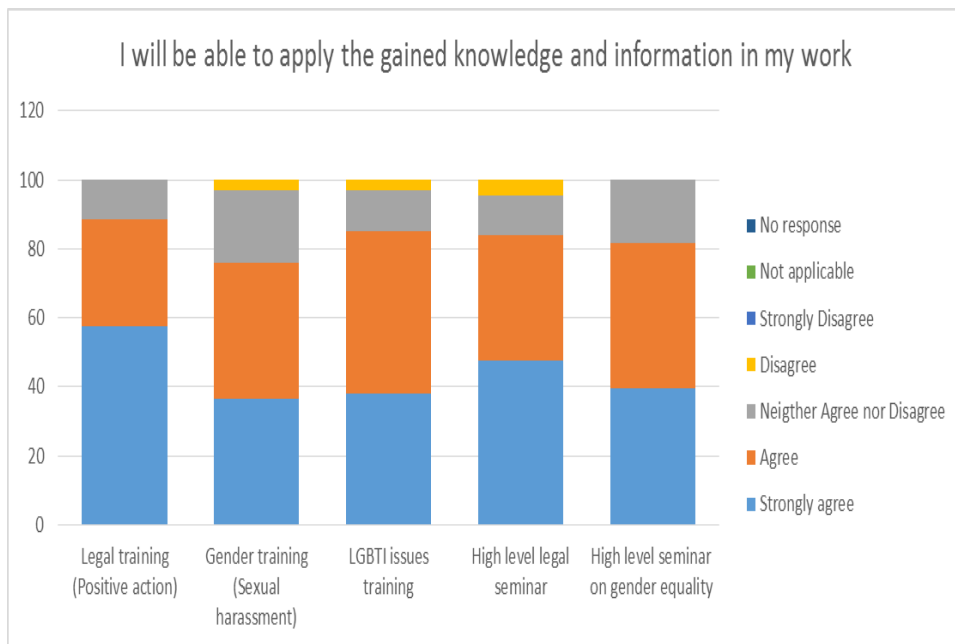
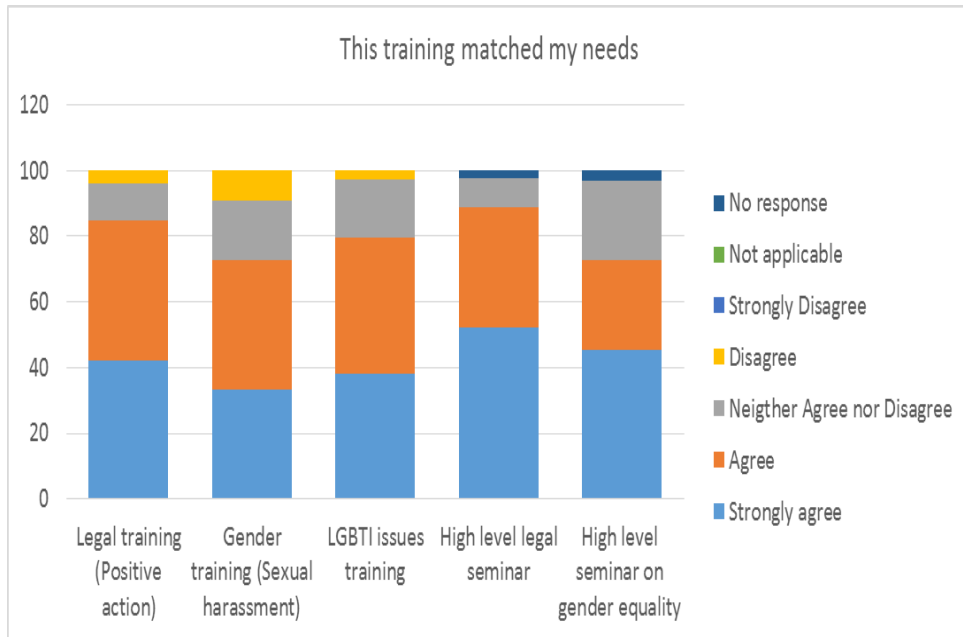
**QUESTION 4 (Members):** The European Commission, as funder, likes to define work quality in terms of its timeliness, the accuracy with which it is executed and how useful the work was. Taking each of the work areas listed, what is your view of their timeliness, accuracy and usefulness, i.e. their quality and impact?

**Statistical scores**

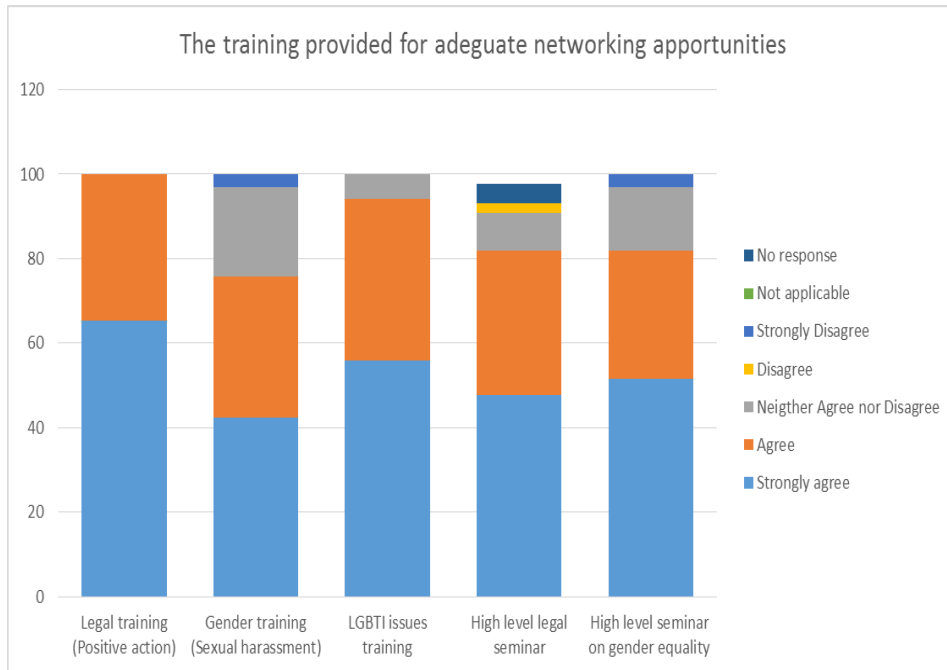


These scores broadly accord with Equinet’s own post-event evaluation data. Taking three of the questions from the participants’ evaluation sheets for the training and evaluations, a positive picture emerges:

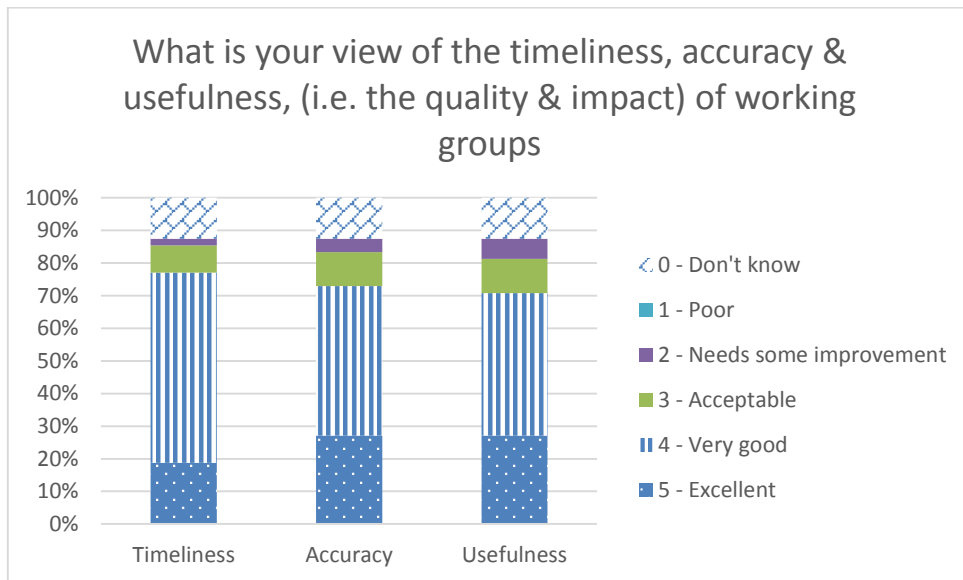
REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET



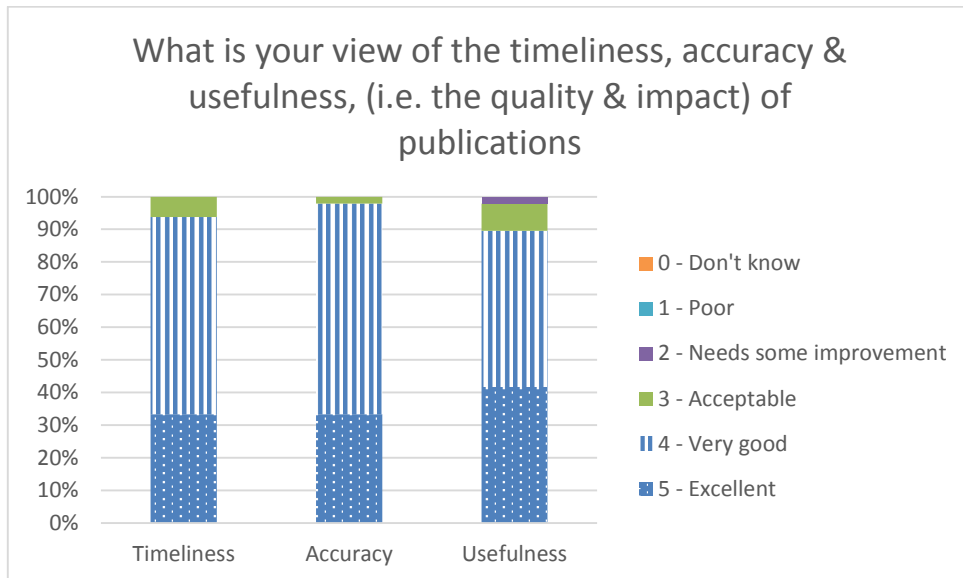
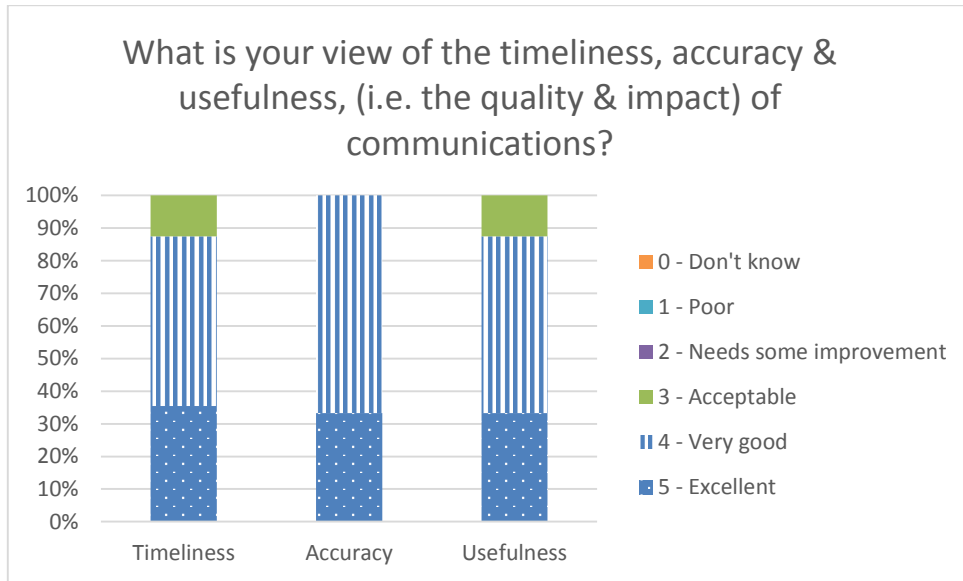
REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET



Returning to the survey, and to the other major activities of Equinet, the following graphs illustrate the results for working groups, communications and publications.



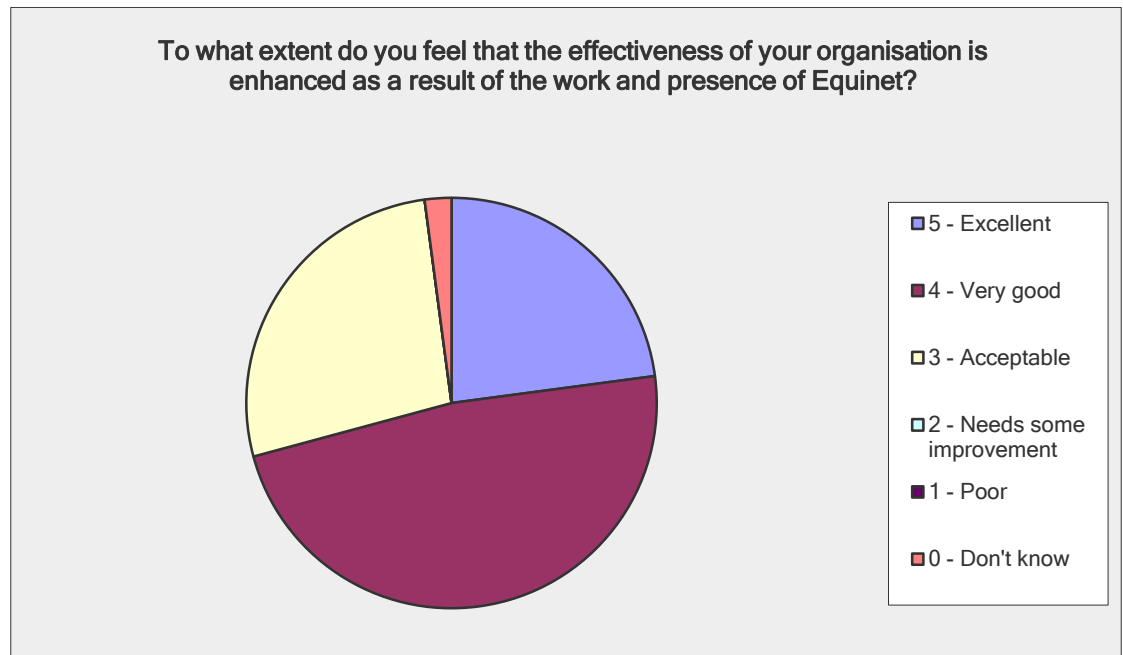
REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET



## Equinet's key impact indicators

**QUESTION 5 (Members): To what extent do you feel that the effectiveness of your organisation is enhanced as a result of the work and presence of Equinet?**

## Statistical scores



## Member Survey remarks

There were 7 sets of comments.

- Further work needs to be done within [EB Name] to disseminate the benefits of the Equinet network across our organisation. Equinet may wish to consider how it can extend its reach within EBs beyond those who attend meetings/seminars, eg development of website, webinars, dissemination of publications, etc. Our work is promoted externally, and as a result we tap into new partnerships and opportunities of relevance. Our skills and knowledge, as an organisation, can increase. We share the learning with stakeholders and we learn from them. There is the opportunity to capacity build and develop external working relationships further. This can help us, as an organisation, in terms of information and intelligence gathering.
- What I find extremely useful is that when e.g. we are promoting certain policies that this can be supported by experience in other countries with similar policies. But I'm not sure if this is what you mean to hear here
- Suggestions for strategic plans and for evaluation in the organisation
- The work and presence of EQUINET enable [EB Name] to share information, good practice, interpretation of directives and experiences with other equality bodies. EQUINET and its members are also a point of reference on matters related to our daily

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

work. [EB Name] also makes reference to the research and perspectives published by EQUINET in its daily work. This in turn strengthens the work of [EB Name]

- The collaboration so far has been very good. The main impact has resulted from the publications of EQUINET which have helped on handling of discrimination cases by comparing with best European practices.
- With more diversity in meeting forms Equinet will contribute even more to the capacity building.
- Being a small unit it is valuable to engage in both training and dialogue with similar bodies in Europe
- Right now Equinet is the only organisation which arranges support for the equality bodies. The staff of the EB has no other chances to rise their knowledge and qualifications.
- I need to work harder to ensure that all staff are aware of/engaged in and with Equinet's work – but membership of Board is seen as very positive by the organization and external bodies which is helpful to reputation building
- Equinet could play a more important role in stimulating, assisting and backing joint European projects of Equality bodies under COM calls.
- As an Equality Body, we made a deliberate choice to invest a lot in Equinet, but we see that there is a high 'return on investment'. It gives excellent opportunities to both the institution as a whole to question its practices and improve them, as to staff members to improve their understanding and skills in tackling discrimination and in promoting equality.

## Interview comments – Members

- We use their expertise a lot, especially as we are still new and understaffed. This peer support role is very important for us.
- As a new institution, EQUINET's input is very helpful for us.
- EQUINET has a high level of visibility in our organisation, not only through training, but also to draw on other cases from other countries. So, our membership is a great support for us and this is important because the issue of equality is controversial in our country, so we need the solidarity that comes from others, their friendship and their standards. They are a motivator for us.
- EQUINET provides an international point of view which is valuable – the point of view of the EU, especially the EC. We would have to invent those channels if they weren't there, so it would good to intensify this area of work.
- The sense of community (through the EQUINET network) is a useful spur to public engagement for us. But more impact could be had with better segmenting of the needs of different members, whose interests are often not the same. For us, we need to be selective of what we take part in and what we don't.

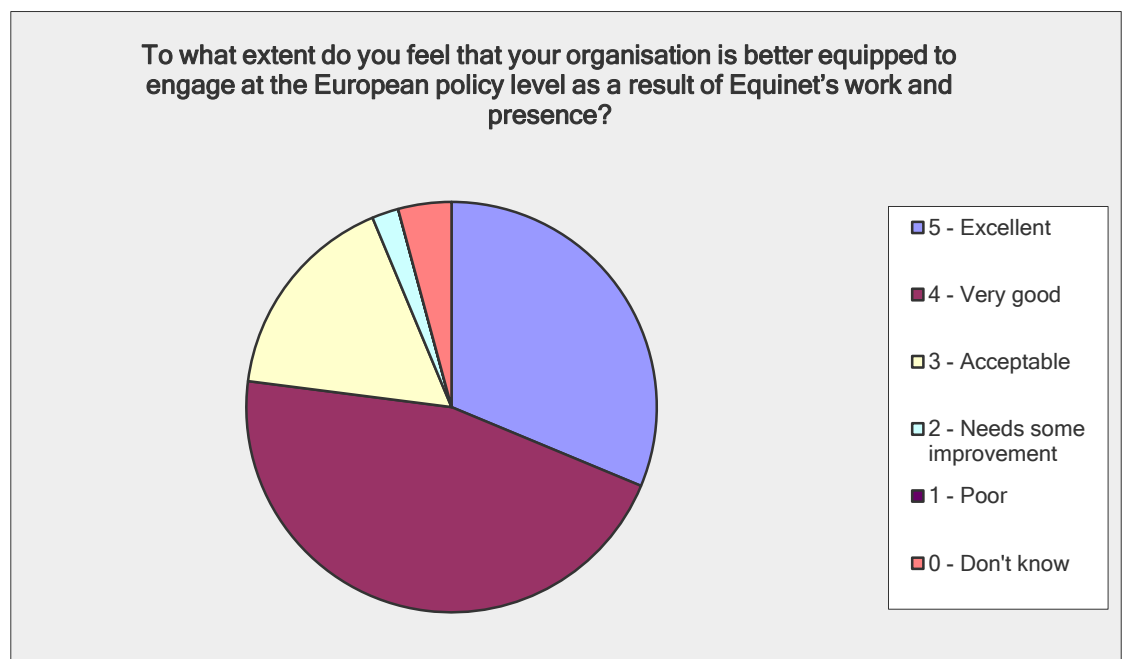
3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- This is a two-way story – you get, in part, what you put in – so there is a question about how we organised internally, and I’m not sure our internal processes are aligned to gain the most impact from our membership of EQUINET. This is a change we need to make, to get more impact from our membership

**QUESTION 6 (Members): To what extent do you feel that your organisation is better equipped to engage at the European policy level as a result of Equinet’s work and presence?**

Statistical scores



Member Survey Comments

- We believe the development of standards for equality bodies is particularly important. In our response to the European Network of National Human Rights Institutions (ENNHRI) we similarly highlighted the importance of standards, capacity assessment, gap analysis and increasing institutional capacity as priorities for strengthening NHRIs in Europe. We believe the two areas C. Serving as a knowledge and communication hub on equal treatment and D. Consolidating the network and its members are important to help [EB name] achieve its aim of being a trusted advisor. We think Equinet can play a key role in helping with the dissemination of information on new legislation and consultations, particularly other NEB’s responses to them to understand what key priorities are at other NEB’s.
- Although [EB name] is engaged at the European policy level through other channels, EQUINET provides the platform which enables [EB name] to participate in consultations, discussions and training on matters that are directly related to the European policy, and to acquire knowledge and information on what other equality bodies are doing to work towards European policy objectives, thus strengthening its own capacity. [EB name] has also had the opportunity to discuss directly with representatives of European institutions through EQUINET events.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- A key role with potential for further development , which is signalled in the new Strategic Plan
- As an ombudsman–institution and NHRI, our institution's primary focus is not engaging at European policy level in equality issues.
- Equinet is an important link to the European level, both by forwarding information to members about activities and decisions with the EU and the Council of Europe, but also by representing the Equality Bodies at meetings which has led to a greater openness for EB contributions.
- We have no direct possibilities to engage at the European policy level, but information provided by Equinet is useful also at the national level and this way we have indirect impact at the European level.
- EQUINET enables [EB name] to participate in consultations, discussions and training on matters that are directly related to the European policy level, and to acquire knowledge and information on what other equality bodies are doing to work towards European policy objectives.
- Very valuable conduit of information on what is happening at EU level – and this should be enhanced with new officer to focus on meeting members' info needs and likely monthly bulletin
- Equinet allows us to understand the EU–policies, and to approach our national decision makers in order to influence the EU–agenda (which in return has an impact on the national agenda).

## Interview Comments - Members

- EQUINET is an important way in which we can improve our work and establish more clearly our organisation which is still very new. EQUINET also provides us with the opportunity to raise our profile at home.
- We don't act directly at the EU level, so EQUINET is a hub or communicator for us to do this effectively, especially as our governance doesn't always pass the messages accurately.
- EQUINET provides a vehicle for communication with the Commission, other EU bodies, FRA, etc in a cost–effective way, and this strengthens us here.
- EQUINET can provide some leadership on the key issues that affect us all
- EQUINET should provide more leadership on some of the big items, eg Freedom of Movement Directive or on the Goods and Services Directive

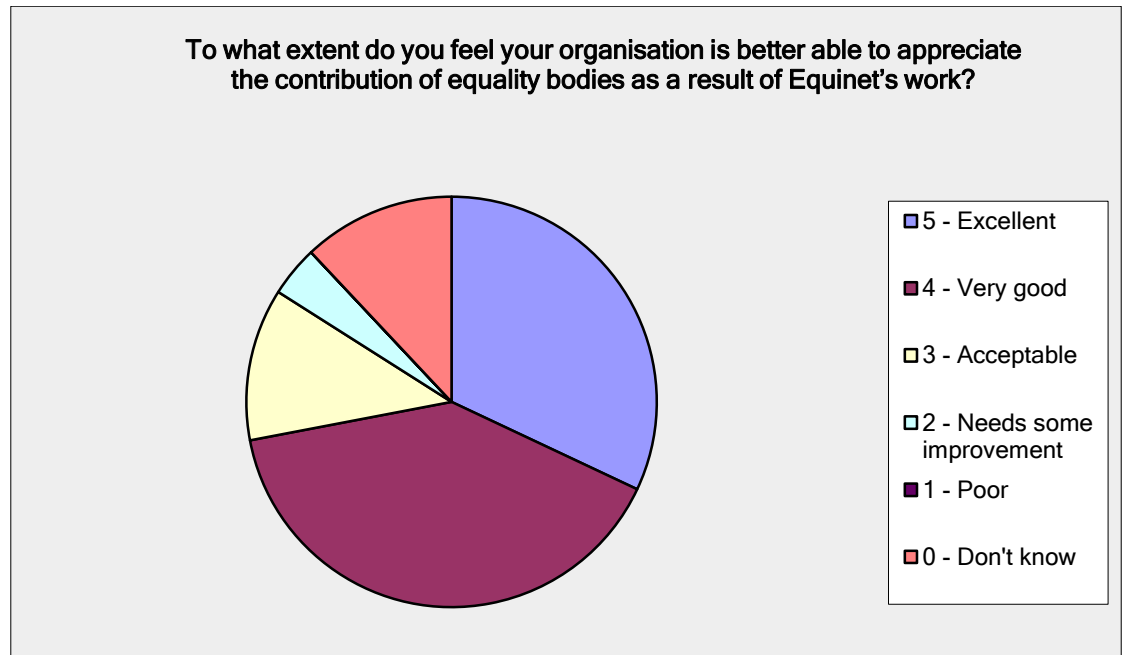


3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

**QUESTION 4 (External Stakeholders): To what extent do you feel your organisation is better able to appreciate the contribution of equality bodies as a result of Equinet’s work?**

Statistical scores



Survey Comments

- Equinet is able to highlight the shared achievements of its members.
- Could be improved via strategic meetings to see where lies the joint and different influence spheres as to be more powerful in achieving the organisation’s strategic objectives of both.
- Equinet and my organisation have developed common synergies and cooperation which resulted in a better appreciation of EB’s contribution as well as needs.
- I believe there is room for improvement in terms of cooperation, especially of how our EU level members (NGOs) can encourage their national members to work with the NEB in order to influence EU policies (e.g. to push for the anti-discrimination directive, equality data collection, trainings etc.). Also we can create more synergies between our events we organise in Brussels and in member states. To link to people on the ground experience inequalities, we have to improve the link between us on an EU, national and local level.

Interview Comments – External Stakeholders

- It’s very important for us to understand what’s going on and how policies are implemented, so they are integral for us.
- They are complementary to our work, so if we’re struggling to find good case examples, we call EQUINET and talk to them about trends, etc. We feel more aligned with them now.

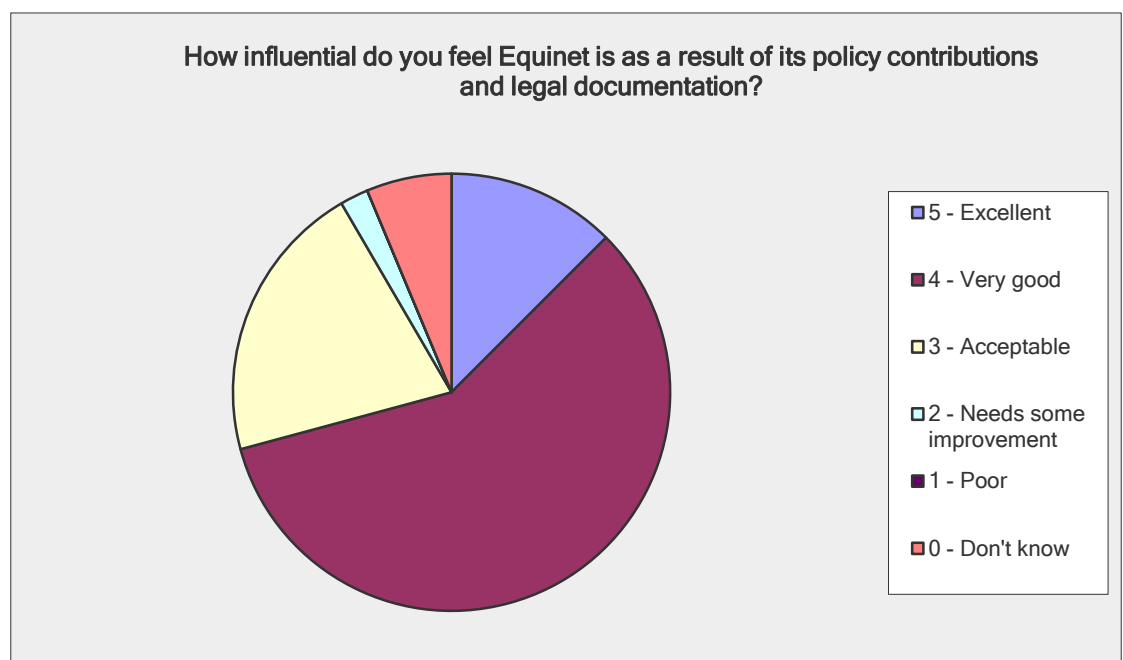
## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- The information flow is very important for us, so we can learn about what's happening on the ground in each member state. Mutual trust is the key here and it is present throughout all our dealings. This means that the impact of EQUINET is high, but it also points to EQUINET taking a strong political role, providing greater leadership on some of the topics, grounded in its experience base.

### QUESTION 7 (Members): How influential do you feel Equinet is as a result of its policy contributions and legal documentation?

Statistical scores



#### Survey remarks - Members

- Through close cooperation with EU institutions, the work of EQUINET feeds into the work of EU policy.
- Please see the answer to question 1 in relation to impact.
- Through close cooperation with EU institutions, the work of EQUINET feeds into the work of EU policy
- Equinet has devoted significant efforts to supporting development of member capacity and relatively less priority to broader equality policy matters. while both are important, again some welcome rebalancing on this is signalled in the new SP
- To be even more effective Equinet should have an even stronger focus on what Equinet and its members themselves want to accomplish and formulate common positions regarding these issues.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

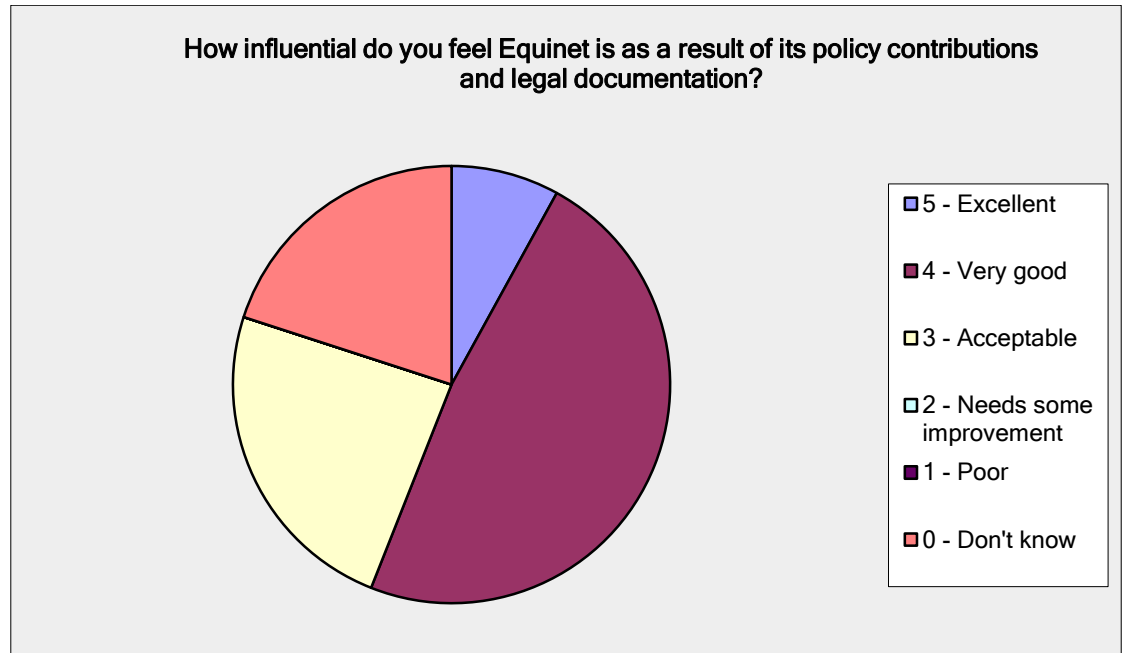
- It is clear from the quality and nature of engagement with European Commission officials, with their contributions to our seminars and training events and through what is written up in publications that there is a very positive influence brought to bear by Equinet based on the experience and expertise of equality bodies – and more broadly with other European players – increasingly the Parliament and also FRA and European level NGOS plus Council of Europe etc.
- It is a fact that that Equinet's opinion is asked and taken into account by EU-institutions, by the Council of Europe, but also by civil society organizations at EU-level.

## Interview Comments - Members

- For new and aspiring member states, Equinet feels very influential, as evidenced by the presence of MEPs and DG personnel at events.
- EQUINET's experience is very influential for us, as it helps us maintain certain standards as we mature as an organisation. Also, it is true to say that EQUINET is unique and holds in this way a pivotal position.
- The key to EQUINET's influence is firstly its uniqueness and secondly how it cooperates with others, so we can improve our work, but also thirdly in the depth and quality of its analysis of the issues, which is valued by all.
- While I'm glad EQUINET's publications are there, I tend to skim them and don't find them so useful. EQUINET should express its opinions more. It is hard to express the shared opinions of all members, but for that a better process is needed.
- The publications are stronger as resource documents, but don't really fulfil a part in policy formation, but they should to open up the ground on the key issues. And the whole comms process needs to be upgraded too, to avoid our missing any key issues.
- Influential, yes, but it could be higher, especially in the case of some publications. In some cases, why publish, what does this add, but in other cases, perhaps more could be made of the work that has been done. EG LGBT report was very good. The segmentation point is also relevant here: important to ask who is this document for and how are their needs for this publication being met?

**QUESTION 5 (External Stakeholders): How influential do you feel Equinet is as a result of its policy contributions and legal documentation?**

Statistical Scores



Survey remarks

- Influence is very good on organisations which are sympathetic towards the mission of equality bodies, less so for those who need more convincing.
- In particular Equinet legal and policy papers are very useful to the daily work of the EBs as well as for my organisation monitoring activities.
- This question is not very clear.. I understood that Equinet does not lobby or take any legal cases.
- I believe that Equinet as other actors in the field of equality have best result with the European Parliament, decent relations with the Commission and challenging times with the Council. This is though not the fault of Equinet (there I put 'don't know') but of the current political climate as such.

Interview Comments

- Equinet is very influential – we take their inputs and use them directly. We take their opinions very seriously and we value their specific insights. My impression is that EQUINET is an important institution that others value. It is hard for me to see gaps or improvement areas. Keep doing the good work!
- I'm not sure EQUINET is very explicit in this area: sure, EBs are referred to as a source; EQUINET is referred to eg by key speakers at events; and the merger with the gender body

## 3.1

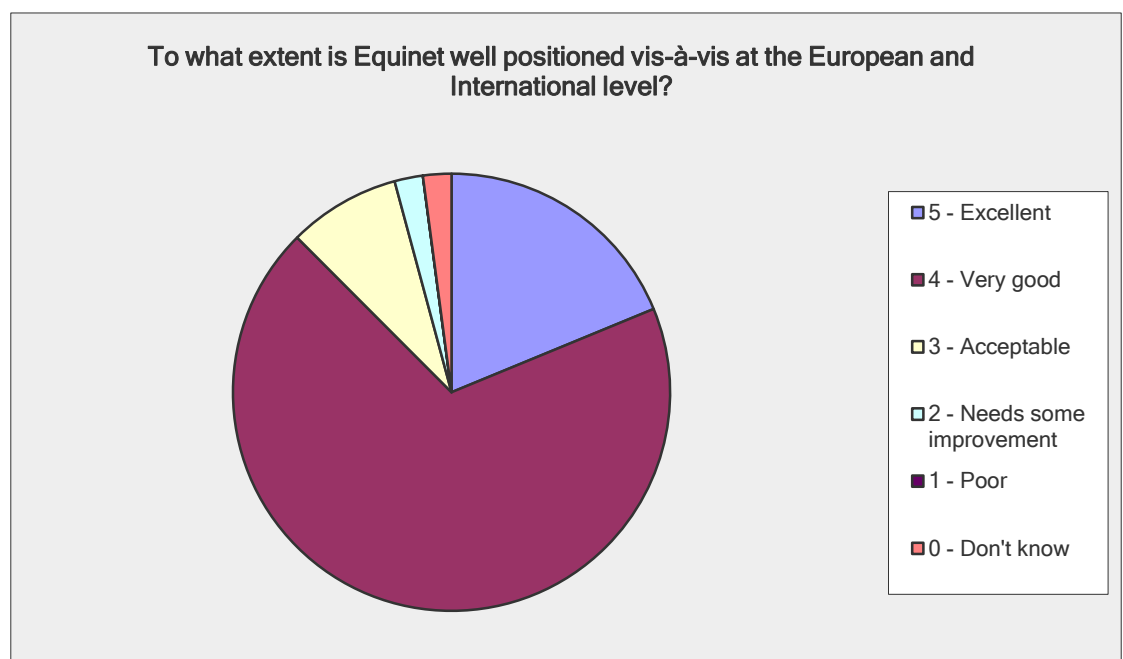
## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

was a sign of influence. But, on the other hand, they are not clear in their opinions, so how can they be influential in making change to policy or in implementing policy?

- We always take their views on board. Their work is well established and quite different from NGOs who may lobby. EQUINET's advantage (and therefore key to its influence) is its status as a public body and the reliability and neutrality that comes with that

### QUESTION 13 (Members): To what extent is Equinet well positioned vis-à-vis at the European and International level?

#### Statistical Scores



#### Survey remarks

There were 11 responses to this question and they can be represented in the following way.

- Yes EQUINET is well-positioned as it organises EU level meetings, consultations and other initiatives which are always well attended. The subject matters addressed through such initiatives feed into the commitments and objectives endorsed at EU level.
- Equinet are very well placed at European and International level. There is scope to improve further in terms of stakeholder engagement and activities. Politically, there is the opportunity to influence further and ensure impact.
- Yes EQUINET is well-positioned as it organises EU level meetings, consultations and other initiatives which are always well attended. The subject matters addressed through such initiatives feed into the commitments and objectives endorsed at EU level.

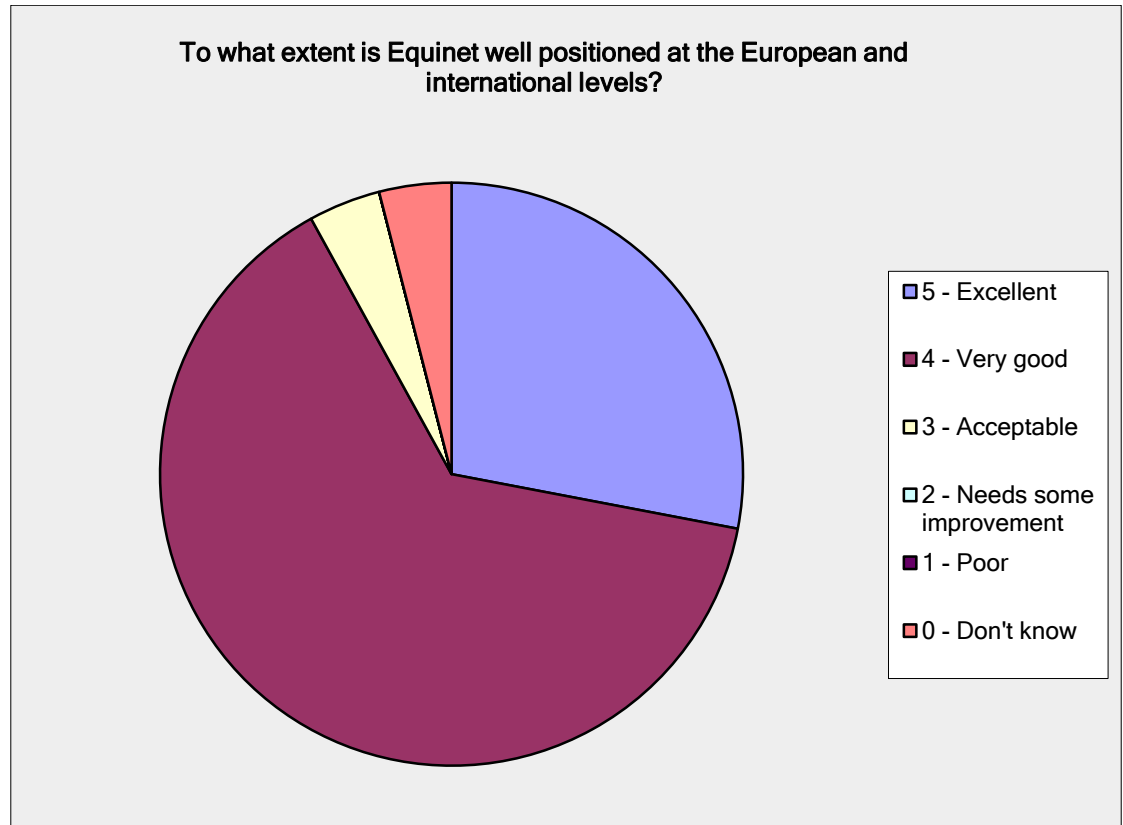
## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- Equinet has established a strong presence with the relevant European institutions but this is something which it would be good to strengthen and develop further over time
- Equinet has many good relations, both in Europe and internationally. But to be even more effective in these relations Equinet should have an even stronger focus on what Equinet and its members themselves want to accomplish and formulate common positions regarding these issues.
- Closer cooperation with other human rights and European institutions is needed.
- Very well positioned, held in high regard and an ongoing challenge to maintain positive reputation
- Excellent towards the EU-level, and see my remark on how much time can be spend for representation at the international level: the question should always be if an international activity is in line with the strategic objectives of the network.
- Among other, I believe that EQUINET becomes more and more visible at international and European human rights and equality events.
- Could be Excellent, but depends on the European actors, not on itself.

**QUESTION 3 (External Stakeholders): To what extent is Equinet well positioned at the European and international levels?**

Statistical scores



Survey remarks to the follow-up question: What are the next steps in terms of its engagement in this arena?

There were 4 responses to this question and they can be represented in the following way.

- Maybe still lacking a little bit of visibility in general, but it's fully visible for its key stakeholders.
- To reflect more on their space and to see via for example a power analysis where their influence lies and how to use this unique position. Furthermore to explore in a more coordinated way how alliances can serve the strategic objectives of Equinet and its members.
- Excellent at European level, less visible at International level, but makes sense for focus to be on EU, given the members.
- My impression for the last 4–5 years has been that Equinet is more visibility and present on the EU, and more reference are made to their work. Next step would be to further extend and deepen their visibility and influence with EU institutions.

3.1

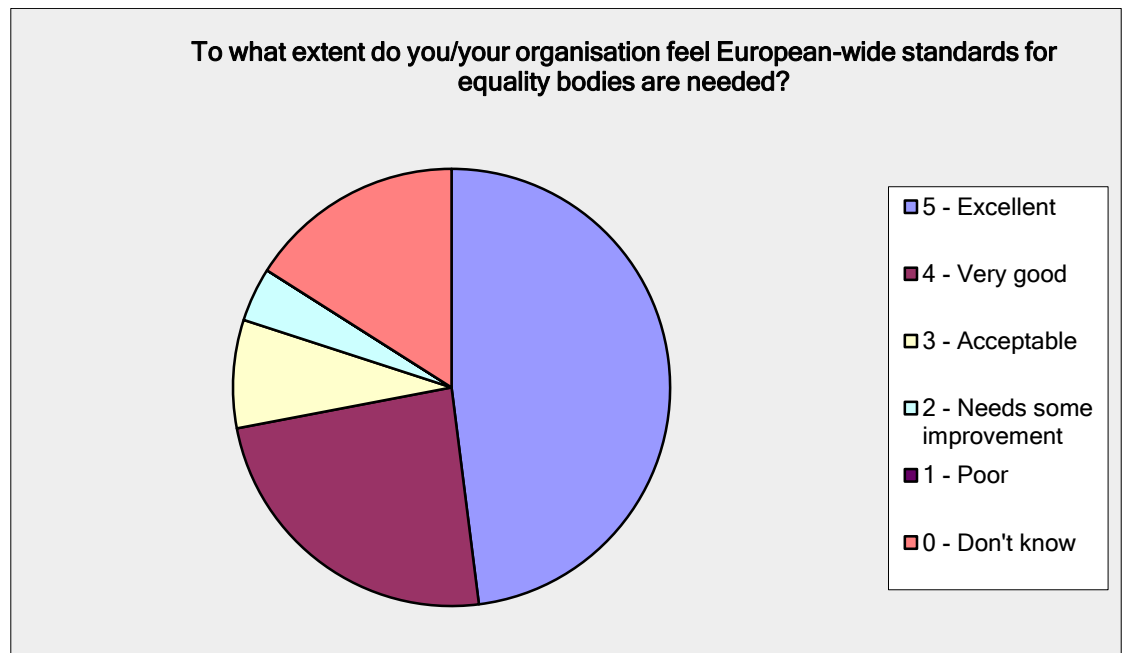
REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

Interview Comments

- Equinet is very well positioned and in the last year this is particularly the case in relation to the Commission and the EP, with whose activity they are closely aligned, eg transgender issues as well as their assessment on other topics. It is important to build in these positive relationships across the entire network.
- The event at the EP was a milestone, indicating that EQUINET is well positioned, given the high-level presence there from the EP, especially the LIBE Committee. This shows they have good credibility and good relations. They should continue the way they are in this respect, although even better would be to leverage more their experience to effect a stronger policy influencing outcome.
- Equinet accomplishes its tasks and contributes to the EU policy level debates. We have good cooperation with them and there are no issues. This is not the case with all agencies. If there were a new all-grounds Directive, that would make a big change to the landscape, however. So, good positioning. Might need to improve a little on communications, perhaps a revamp in this area would help.

**QUESTION 6 (External Stakeholders): To what extent do you/your organisation feel European-wide standards for equality bodies are needed?**

Statistical scores



Survey remarks

There were 7 responses to this question and they grouped under three headings.



## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- Standards are definitely needed.
- Standards are good in terms of having the best standards to achieve change for the mission of Equinet.
- EBs at EU and CoE level have a variety of forms (Specialised Bodies, Ombudsman, NHRI, etc.). At EU level, the current Directives are very poor on EB's standards/mandate. The two factors combined could lead to poor EBs effectiveness in combating discrimination and promoting equality. Clear EU standards on independence and mandate for EBs are much needed.
- The ratings don't seem to reflect the question?
- Europe need horizontal EU legislation for equal treatment that should treat all grounds equally – and NEB should be given similar mandate (allowing for flexibility), preferably having the independence and mandate to also promote equality across all grounds. Exactly how such standards should look like I trust Equinet and its members know the best.
- I am not in a position to answer this question
- Very much needed!

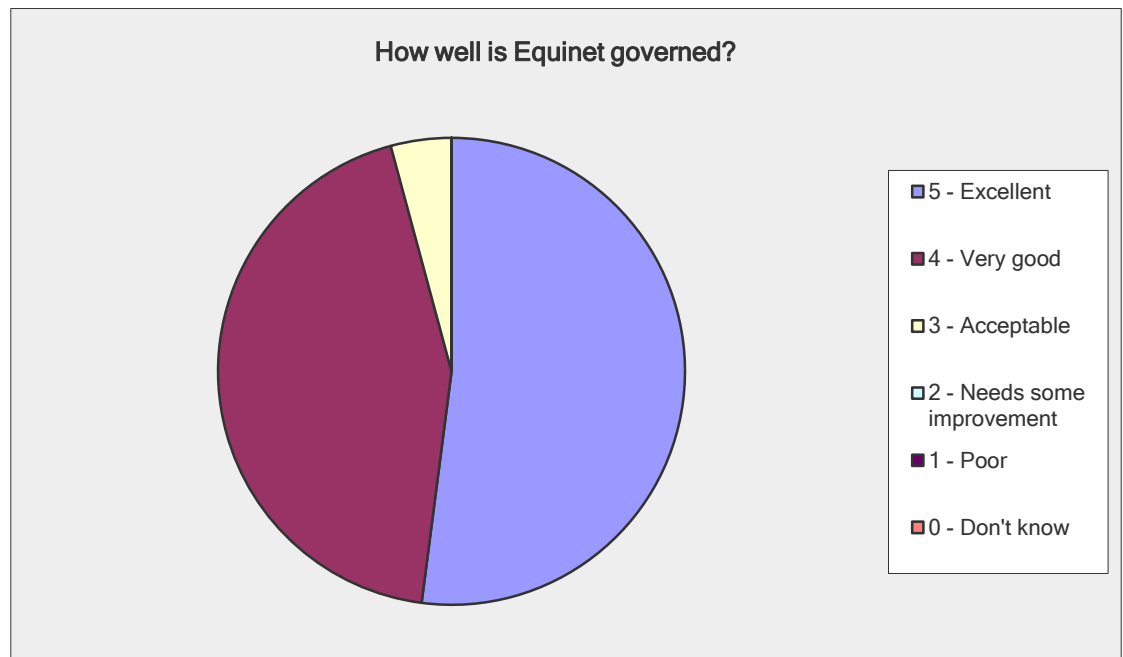
## Interview Comments

- Not our job to comment, but having a standard may be helpful to EQUINET and its members.
- I'm not sure – the situation is different in different member states. Is it practical? Could it be resourced?
- I would be in favour of this as a voluntary thing. The Commission is open to this, and we'll have to see if there is a way ahead with the new Commission. But EQUINET should go ahead and act, not waiting for the Commission.

## Equinet from an Organisational Standpoint

**QUESTION 8 (Members): How well is Equinet governed?**

## Statistical scores



## Survey remarks

There were just 8 responses to this question and they grouped under three headings.

- From [EB name's] experience at events, including the AGMs, EQUINET seems to be well governed by the management board and to date, has worked well and in an efficient manner with [EB name].
- The board is influential and effective in decision making.
- While operating within tight resource constraints Equinet has put in place excellent governance structures and procedures and a high performing secretariat.
- We think that formally the EQUINET is well governed. But need to look in practice how it functions.
- The increased involvement of member organizations in planning and formulation of strategies and working methods is appreciated.
- As Board member for last three years, am impressed with governance arrangements – clear and well-structured to deliver for a membership organisation
- Great sense of responsibility by the Executive board and by the secretariat.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- Sometimes, the role of chairs and participants to working groups could be even better clarified and followed.

**Interview comments (unprompted)**

- Governance is well supported by the Secretariat – efficient and timely papers. It is a danger to be totally dependent on the Commission for funding. Board needs to take a clearer line on providing leadership over the issues

To what extent does the End of Project Conference work well?

**Observation of the End of Project Conference**

There were 41 participants from 31 national members of EQUINET, a good turnout to a well-managed one-day event. The break-out groups attended by the evaluator were both lively in terms of participation, well led/facilitated and it was clear that participants were learning and felt able to engage in an open manner. In some cases, there were progressive and creative suggestions on the topics in hand.

There is for this observer a slight question of branding in regard to the End of Project Conference. EQUINET successfully ‘hides’ an annual conference inside its End of Project Conference. It is arguably the case that for most people, the End of Project Conference represents more a legal necessity that one should attend, rather than the great central point on the annual calendar. Why not consider branding the event as the annual themed members’ conference, into which is ‘hidden’ the necessary legal element of the End of Project Conference?

**Equinet’s own evaluation of the End of Project Conference**

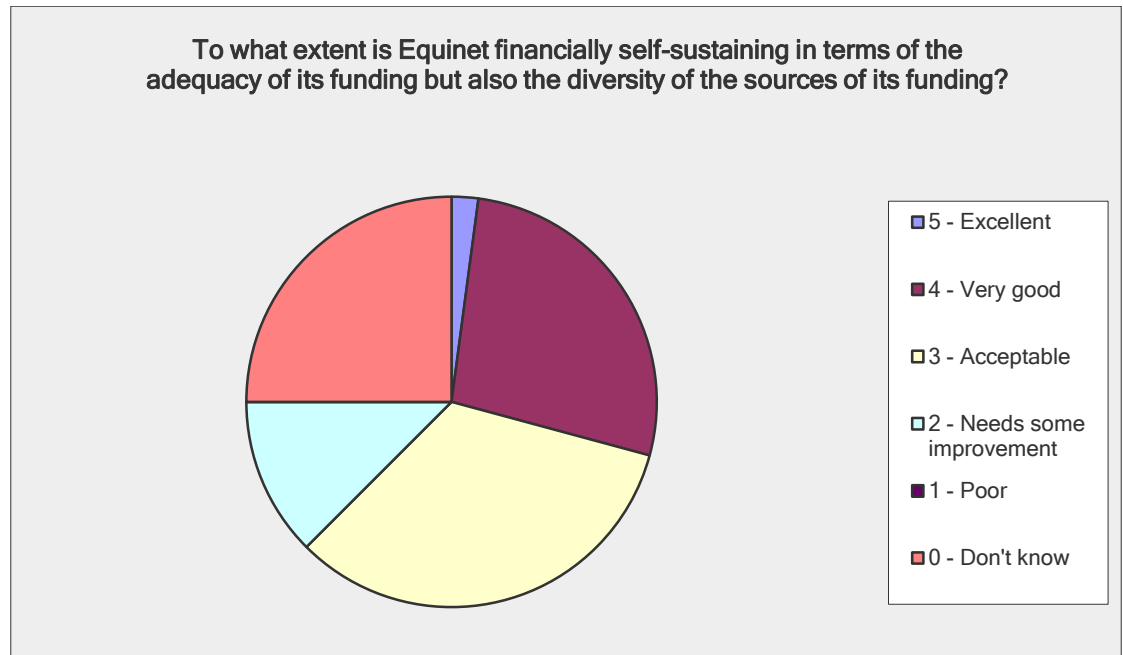
Equinet’s own analysis of the End of Project Conference, prepared and presented to the Steering Committee, indicated a high level of satisfaction. There were no scores of bad or very bad. Participants observed a number of positive features of the End of Project Conference and no written observations of weakness were made.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

**QUESTION 9 (Members): To what extent is Equinet financially self-sustaining in terms of the adequacy of its funding but also the diversity of the sources of its funding?**

Statistical scores



#### Survey remarks

There were 5 comments and each could be considered under the following headings.

- Financially EQUINET depends on DG Justice – Rights, Equality and Citizenship Programme 2014–2020.
- Both the level and nature of funding available to Equinet to date have been limiting in certain ways. My understanding is that the latest funding agreement with the Commission provides for greater flexibility in how it is applied to the work which would be very welcome. In principle sourcing funds from a range of sources has attractions but the value of additional sources must be determined on a case by case basis.
- Equinet needs a sustainable long term funding that is more independent of the calculation of staff participation from National Equality Bodies. An external sustainable contribution that complements the member fees would be optimal.
- Difficult one to answer – budget for 2015 very positive and prospects going forward under current funding programme also positive but of course only one source – we will need to keep this under review
- Equinet has sufficient resources to fulfil its missions in a very good to excellent way.

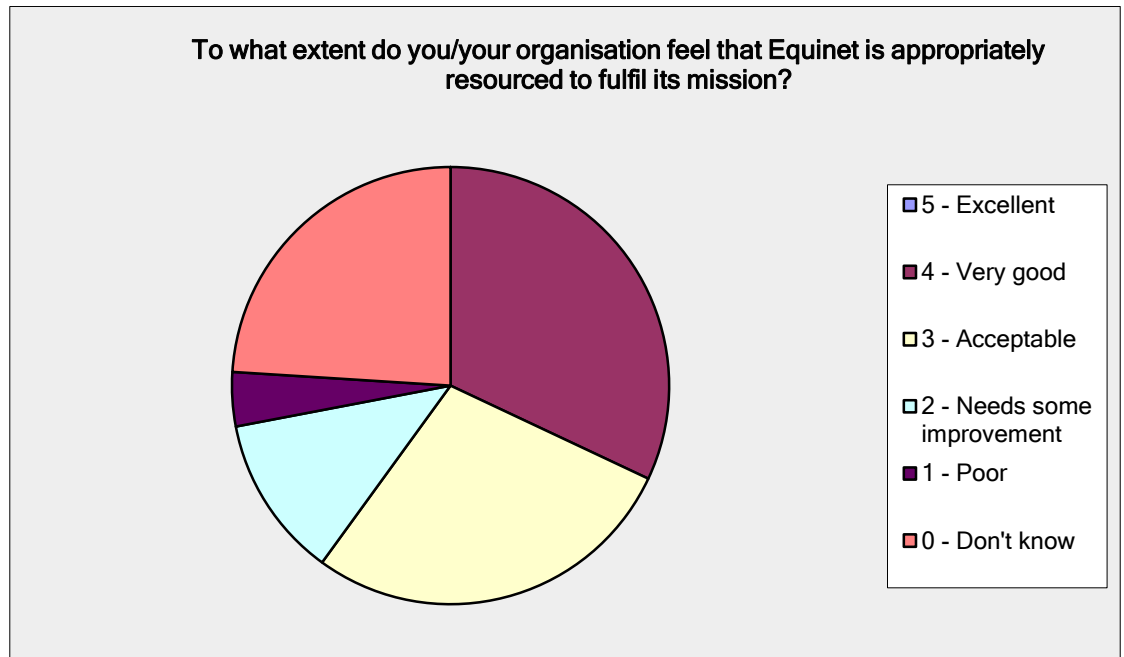
3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- It is excellent that there are two and only two sources of funding: the EU–Commission and the members. Equinet, as the network of state–funded equality bodies, should never compete with NGOs by looking for funding from private institutions.

**QUESTION 7 (External Stakeholders): To what extent do you/your organisation feel that Equinet is appropriately resourced to fulfil its mission?**

Statistical Scores



Survey remarks

There were 3 comments and each could be considered under the following headings.

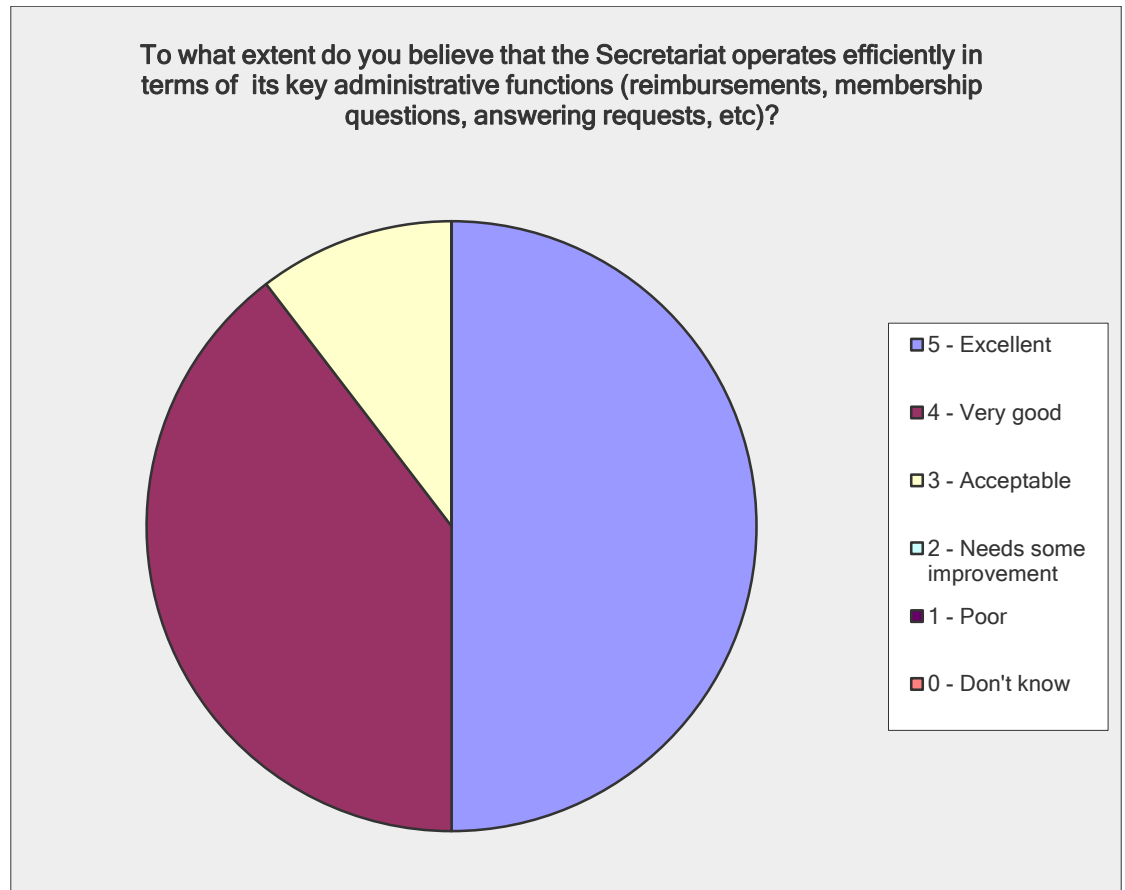
- Even though more resources most probably could enhance its impact and using more new technologies, too.
- Equinet has highly competent staff doing the maximum with the resources they have. Of course one would wish that more resources (in general) would be allocated for promoting equality, especially for Equinet and civil society.
- Not in a position to answer this

3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

**QUESTION 10 (Members): To what extent do you believe that the Secretariat operates efficiently in terms of its key administrative functions (reimbursements, membership questions, answering requests, etc)?**

Statistical Scores



**Survey remarks to the question: How could the needs of Equinet’s highly diverse membership be met better in the future?**

There were 10 responses to this question and they can be represented in the following way.

- [EB name] deems that the Secretariat operates efficiently.
- There could be emphasis on creating secondment and exchange partnership and career opportunities.
- In principle a large secretariat could obviously do more for the membership and Equinet more generally. However our experience to date is that the secretariat do an excellent job.

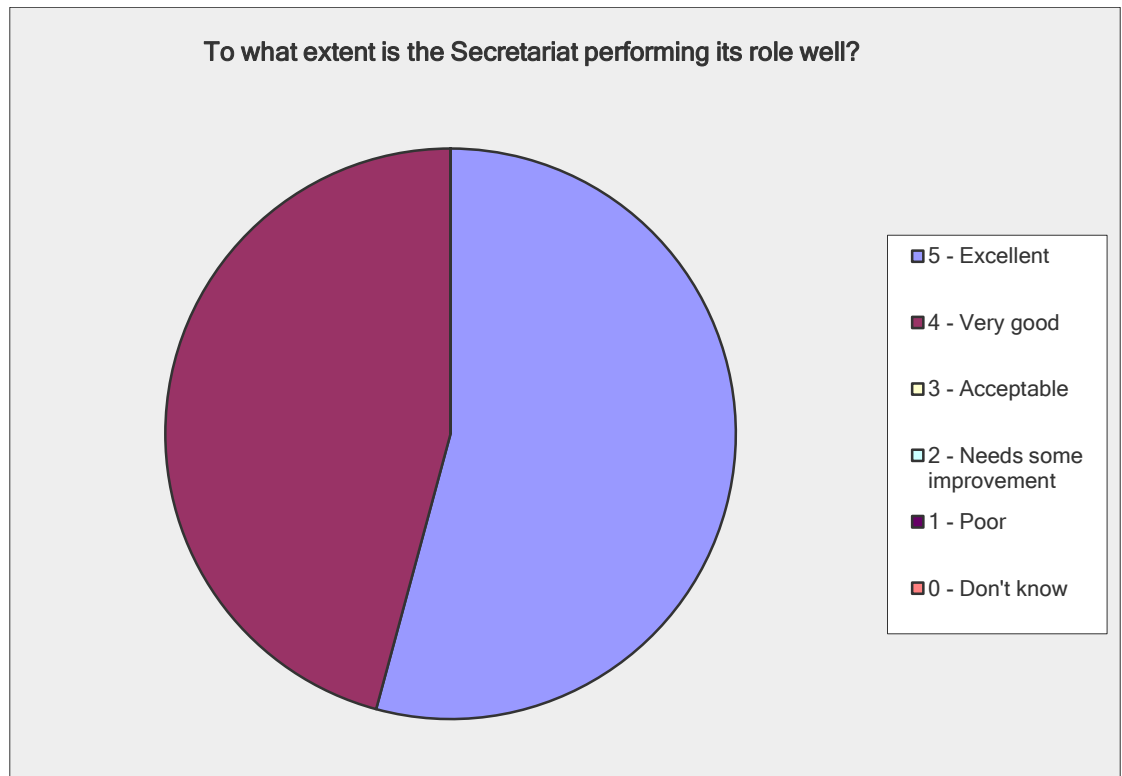
## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- During the communication on the CPD membership to the Network, thus related to membership questions and answering requests, the secretariat has always been willing.
- In some areas the Secretariat operates very efficiently while less in other areas.
- A serious problem for us is a long delay in terms of refunding the cost of our employees participate in the Equinet seminars and training. Up till now, we have not received a refund for the entire previous year. As a result, the budget of our organization in this area is heavily loaded.
- Staff are all great! Think there is a challenge in meeting all needs and requests also from external stakeholders and this is managed well – the new officer will help with workload issues. Reimbursements an issue not related to efficiency but to queries on overall budget by EC, now resolved for 2012–13 anyway.
- I think the secretariat is doing an excellent job in its administrative functions. There were some smaller problems, but they had mostly to do with a lack of responsiveness and/or accuracy by members: Equinet should develop tools to prevent and to correct this, even if it is only a problem in very few cases.
- By increasing the number of Secretariat staff– connected with the need of financial strengthening.
- Congrats to Yannick and Tamas!

**QUESTION 11 (Members): To what extent is the Secretariat performing its role well?**

## Statistical Scores

**Survey remarks to the question: What are the next steps in its development?**

There were 8 responses to this question and they can be represented in the following way.

- EQUINET can consider whether an internal exercise to bring about simplification of processes can contribute to its development.
- A dedicated team which are easily approachable. They are specialists in their field of work.
- To ensure they have the right training opportunities to develop their skill base further. There may also be the potential to expand as an organisation.
- To maintain the quality of the services
- Team building with 1 additional member and 1 new Comms officer to replace Cosmin – and ensuring that it is fit for purpose to deliver new Strategic Plan and growing membership
- It will always be important to reflect on the role of the secretariat of a network. Indeed, if the secretariat is doing too much, it can harm the necessary strong commitment of the members.



3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- A challenge is that the network is more and more known and that the staff members are invited to participate in a huge number of activities. There is a need for a strategy, in order to prevent that too much time is spend in this kind of representation of the network, and not enough in sustaining the basic missions of the network as a network.
- Increasing personal resources

## 3. Analysis

### Introduction

Here are the key findings from the data as presented.

### Equinet from a strategic standpoint

#### A new strategic plan

Building upon the issues developed last year in terms of SWOT and key strategic issues to be considered, EQUINET now has a new strategic plan in place. Both the planning process and the new plan itself are viewed very positively. There is a strong sense of alignment between the plan's objectives and the membership, echoed in the high scores. Particular comment was made about the planning process's ability both to ensure continuity and to innovate - not an easy 'double act' to pull off.

So, on the one hand, the plan galvanises the network and the organisation, putting focus around its intentions and guiding its actions and resource allocation. But, on the other hand, of course, a plan is only a plan, so the proof of its effectiveness will be in its delivery, and there was a note of caution in the data that for EQUINET to ensure impact from the plan is the key issue now: things have to be seen through.

But overall, a good process and a good plan that has credibility amongst the membership.

### Equinet from a service delivery standpoint

#### Introduction

The responses to the questions this year, repeated from last year, are consistent: EQUINET is viewed positively in this area yet again, but also the challenges noted in previous years remain to a large extent.

#### Output during the year

Overall output volumes, as noted in our summary table remain fairly constant. Expenditure remained in the same range as the previous year and with a similar number of staff.

#### The offering

Asked again whether the offering from EQUINET was the right one, respondents were overwhelming in their support for the idea that it is. The emerging issues are around:

- Facilitating access and comprehension by using ideas like speech to text at meetings or more use of translations/interpretation

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- The greater use of new technologies to broaden the ability to reach more people better and more cheaply, eg by webinars, e-learning platforms, etc

### Scores

The scores for each of the individual offerings were equally high, be they for timeliness, accuracy or usefulness in all areas. It is true also that there remains room for development in all areas, but particularly so in relation to working groups

### Training & seminars

In relation to trainings and seminars, high value was felt to be accrued from a CDP point of view, while noting that:

- It is important to ensure prompt follow up
- It remains important to segment the offering to ensure in particular that:
  - For certain events, higher end (i.e. more senior, better known) speakers can be attracted to attract the senior colleagues from member organisations ...while
  - Ensuring that there are offerings too for the more junior staff that meet their training needs
- EQUINET keep developing the range of peer to peer learning opportunities as a key tool to building capacity

### Working groups

When thinking about the working groups, there was an opportunity, suggested in the data, of further refining the model, including considering how working groups are led, the expectations placed upon them, the need for outputs and publications and whether subgroups for specific tasks may be of interest and benefit.

## Equinet from the standpoint of its new key impact indicators

### New indicators

In order to begin to assess its own impact, EQUINET has proposed a range of impact indicators in its new strategic plan. An innovation of this evaluation process was to take those indicators and seek data on them, in some cases from members, in some cases from external stakeholders and in some cases from both. These are therefore the first results of using these indicators and they are both enlightening and heartening for EQUINET. As the next section of this report will suggest, they point to a new way of the board monitoring the performance of the organisation.

### Enhancing members' effectiveness

The majority of members feel that the effectiveness of their organisations is enhanced by the presence and work of EQUINET, most notably through the sharing of practice and lessons learned including cases and approaches to handling cases.

But, it is noted, that this is also a two-way story, and EBs need themselves to get their internal communications right to ensure that the potential benefits of their participation

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

in the network do in fact accrue to them. Additional benefit can, with the greater support of EQUINET, be delivered by means of more support for joint European projects which attract additional funding, it was argued.

#### Equipping members to engage at EU level

The vast majority of respondents feel that EQUINET's presence does help equip them to engage at the EU and international levels, even if this is only indirectly. It is as if they (especially the smaller EBs) contract out their international work to EQUINET and rely on EQUINET as their principal sources of information, contact and support in this arena.

The work around common standards for EBs is seen as important in this context, but the critical challenge is to ensure that the right information is indeed disseminated to EBs – and that they in turn are able to ensure that this information reaches the people it should reach.

#### Enhancing other actors' understanding of the contribution of EBs

The majority of respondents feel very positive about EQUINET's ability to do this well, citing their ability indirectly or directly to reach the work of EBs via EQUINET's work and how valuable that is. The value is particularly felt when specific examples or trend data are needed.

The key challenge here is ensuring that the right messages do in fact reach the right actors, or external stakeholders, and this is not easy. Simple broadcasting of information is helpful and essential, but not sufficient, and the point was made about the need to ensure there are more high-level interactions to explain better the issues and challenges that EBs face. For NGO actors, this is to support their lobbying and campaigning activities, but for EU bodies, this is more likely to help support their understanding of the implementation on the ground of the Directives, and as part of the policy formation process. Indeed, such interactions, be they with NGOs or EU institutions, were felt to offer synergies which may not yet be fully exploited. In other words, it was hinted, EQUINET not only has a pivotal role, but it also has the chance to take a leadership role, better exploiting its unique positioning.

#### EQUINET's influence from its policy and legal documentation

Again the vast majority of member respondents feel that EQUINET does indeed have influence from its policy and legal documentation (just over half for external stakeholders on this question), which, it is said, is excellent, and that EQUINET is an effective interlocutor between EBs and EU institutions in particular.

Where there are challenges, they come from the desire in some parts for EQUINET to take clearer positions on the issues, provide some sort of intellectual lead. But there is also a plea for publications to be more influential, partly as a result of the previous point, but also for the documents themselves to come across in a more impactful way.

#### EQUINET's positioning vis-à-vis EU and international institutions in its sector

In respect of members and external stakeholders alike, roughly 8 out of 10 respondents feel that EQUINET's positioning is very positive - and increasing. Worthy of

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

particular note was the LIBE event at the EP which was enjoyed high level participation and was felt to be a mark of how well EQUINET is now positioned in its sector.

For some, there were three interrelated challenges:

- How to exploit this positive positioning more in terms of the position EQUINET takes on the issues
- The effectiveness of its communications in getting the messages across effectively, thereby further increasing EQUINET's visibility and profile
- The building of strategic alliances on specific issues to enable even more effective influence

#### EU-wide standards for EBs

Amongst the external stakeholders who were asked this question, there is a strong basis of support and therefore encouragement in this area, with comment stressing the need for them and the need for this to be part of a package of horizontal initiatives to embed the values of equal treatment across the EU.

### Equinet from an organisational standpoint

#### Governance

This element received some comment last time, with ideas in last year's report on how to take things forward. Whatever happened the scores are very high this year, with satisfaction amongst the membership of around 95%, with specific mention of effective AGMs – the annual showcase for many members of the work of EQUINET – as well the high input from members into the governance and AGM processes.

Frankly, few challenges in this area were picked up, but one in relation to the chairing /moderation of working groups, whose role in at least one quarter was felt to need revision. A second point that was mentioned was the length of term of office of Board Members (including the Chair), which, from some perspectives, was felt to be too short to make serious impact. It may be that a review of board and chair terms is appropriate to ensure both continuity of leadership as well as continual renewal.

#### Financial self-sustainability

The satisfaction scores on this question were the lowest of all questions – around 30% for both members and external stakeholders. True, in some comments the view was expressed that the income was sufficient and the model was satisfactory, but most comments echoed the concern expressed in the scores. The high level of dependency on the Commission, positive though that relationship undoubtedly is, was expressed as a strategic weakness, while it was also felt that not to go after income for specific projects could be seen as missing an opportunity. Such 'specific projects' could include grant income for additional areas of what may be regarded as core work, but

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

also funds to complement EB funding and to exploit new technologies (eg e-learning packages), or perhaps even to support more translation.

**The key administrative duties of the secretariat**

Specific feedback was sought this year on how well the secretariat was handling some of the detailed administrative and financial support to members. The scores were high (around 90%) and there were some suggestions and comments too. It was said that there were some areas that were carried out better than others, and that the refunds of certain expenses were said to be slow, but that overall things were going very well. The one suggestion was that this area presented an opportunity for some kind of job swap between members and the secretariat to help build skills amongst both parties.

**Overall secretariat performance**

This was rated at the highest of the scores, and up from the high scores of last year, to 100% of respondents feeling that the services was excellent or very good. Chapeau!

The danger of overstretch was mentioned again. In terms of suggestions, it was mooted that there may be opportunities for simplification of some internal office procedures. The idea of better training for staff to support their skills development (an echo of the comment in the paragraph before last) was also flagged.

## 4. Final Reflections: Towards Equinet 2.0?

### A great year

It is evident from this report that EQUINET has enjoyed another successful year, indeed an even more successful year than the last one. The signs are there that it is a learning and responsive organisation (secretariat and membership), maturing and well led in both executive and non-executive senses. These signs include the EP event, the continued confidence of the EC in EQUINET, the continued active engagement by the membership, the increase in staff numbers by one new post, the high scores across the board for its work.

Last year's evaluation report spoke about the move towards EQUINET 2.0; it seems that EQUINET is indeed moving in that direction, attempting to grow modestly, but mainly to keep fresh by striving to do better.

There are five points that seem to emerge this year from the data that may need further reflection and, in some cases, action, in the year ahead.

### To opine or not to opine – that is the question

At least, whether to give a clear view on the substantive policy issues of the moment is a matter of some energy for some and probably needs a little further reflection. This is particularly the case since this discussion can become polarised into four all too easy 'camps':

- The 'we already do express our views, so it's fine as it is' camp
- The 'it's too hard to get agreement from all members to express our views, and we can't express our views except on that basis' camp
- The 'we shouldn't be expressing views, since that crosses the line between functionary and politician' camp
- The 'we must express views on the key issue if we to have impact and exploit the great work we've done to position ourselves and gain credibility' camp

These 'camps' points to concerns about legitimacy (of mandate and of process). And from these positions little movement is easy to make. But there may be useful distinction to be made here in ways that could thaw this discussion.

1. There is a difference between commenting on the impact or implications of a given policy and the wisdom of that policy or law itself. Public sector bodies may feel that the latter is tricky territory for the, but it is often the case that the former is precisely where they need to apply their expertise and contribute that to the debates.
2. Taking an EQUINET policy line may well depend on the issue to hand: taking a line may potentially at least be sustainable, on the basis of the facts in some cases, but in others, there is not real line to be taken.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

3. Since these concerns relate most to primary publications it may also depend on what the publication itself is for. If, for instance, a publication is intended primarily to share practice, to act as a resource manual, to provide an update, to train, then of course taking a line is not likely to be important. If, however, EQUINET wishes to contribute to the policy agenda, and has an evidence bases upon which to make that contribution, what in principle at least is the concern here?

### To publish or not to publish – that too is a question

Comments in the data this year point to the variable quality and impact of EQUINET's publications – some are clearly high quality and very impactful; some, it is suggested are less so.

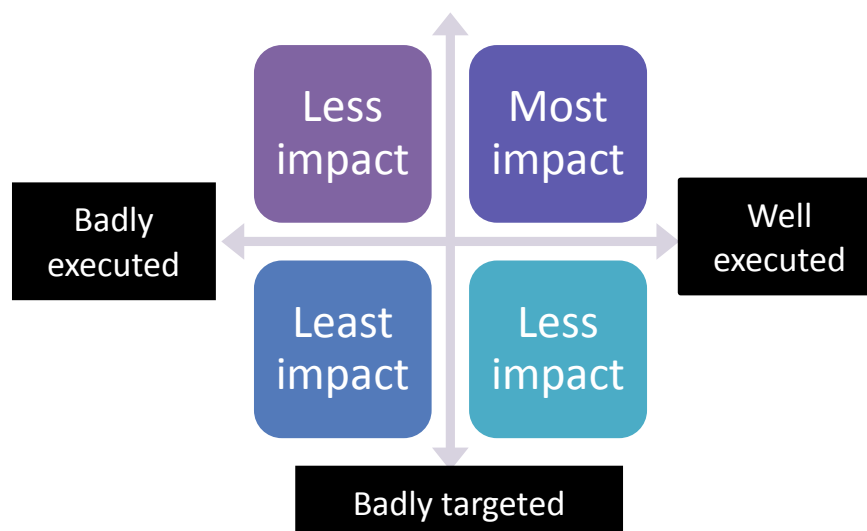
So, the question arises at this point: what is the primary purpose of these publications? Is it to deliver a target set in the annual work programme, or is it to have impact, be that in terms – see previous section – of informing or making a substantive contribution? While the answer must surely be both, EQUINET may in practice risk at times compromising the latter at the expense of the former.

Building on the previous section, it may be that there is, implicitly something of a two-by-two taxonomy at play which is may be helpful to surface. If we examine the goal of the publication (targeted at key target audiences to influence their thinking, be that in terms of information or in terms of an evidenced based policy contribution) and the quality of that publication (it is well designed; it is concise; it is thought-provokingly written; and it is prepared with a specific target audience in mind) we have a 2x2 (Figure)

Well targeted



## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET



It seems that the data in this evaluation supports a more developed approach to ensuring EQUINET's reports have more impact more consistently, i.e. that all are as good as the best.

### Greater accessibility, greater funding – squaring two old circles

A simple connection emerges from the data in this respect.

Firstly, there is a felt need to meet some needs better by using new approaches to learning and to accessing the existing learning (and other) events, for example through speech to text, more interpretation, more translation and the ability to access training via webinars or e-learning packages. Related to this is also the question of the language barrier restricting access from many member's staff. The argument is that there just isn't the budget to cover these things.

The next point is the concern – the lowest scoring topic by far – that the current funding model is too restrictive.

Is there scope to put these two ideas together and to seek project funding to cover some of these elements, thereby increasing participation and reaching members' staffs in new ways?

### Keeping track – towards a scorecard approach?

Now a new strategic plan is in place, the question emerges how will the board be continuously assured that delivery is on track? Reporting against the strategic plan is a typical response to this question, but with the innovation in the new strategic plan of certain impact measures – for which this report provides baseline scores, it is possible for the board to adopt a simple scorecard to track performance of the organisation over time, against strategic plan objectives and using data that are now all available. Balanced scorecards typically include a small number of indicators for the following areas:

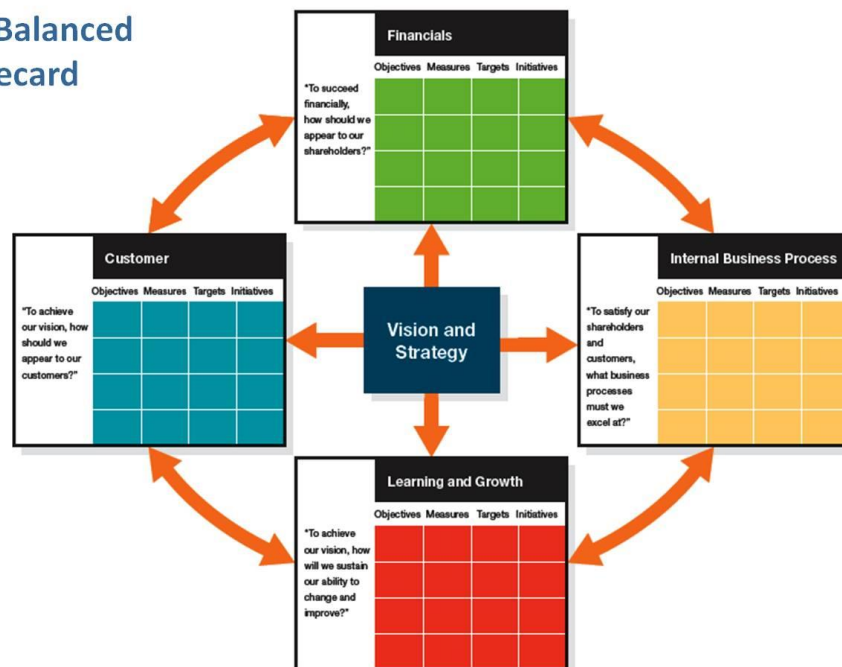
3.1

REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

- Work production volumes, to which could perhaps be added web and social media data (Internal business processes)
- Satisfaction scores (Customer)
- Finance and HR (Financials)
- Impact measures, per the strategy (Learning and growth)

What might be available easily to EQUINET is next to the standard headings for the well-known balanced scorecard schema (figure). This fit is not perfect, since the image below comes from the corporate sector, but it may serve to stimulate discussion about how the board tracks delivery of the new strategic plan in a manageable way.

The Balanced Scorecard



## 5. Appendix

### Survey Questions

The online survey and the individual interviews followed a similar format. Here are the survey questions for members, upon which the questions for external stakeholders and interviews were a variant:

1. Equinet has recently developed and agreed a new Strategic Plan (link to document on website<sup>2</sup>). To what extent does Equinet's strategic plan provide the right focus for the organisation over the period 2015 to 2018? (1-5 rating scale) Reflections?
2. How effective and inclusive was the planning process that resulted in the new Strategic Plan for Equinet? (1-5 rating scale) Reflections?
3. To what extent is the offering for Equinet's members (trainings, seminars, working groups, communications, publications, external relationships) the right one? (1-5 rating scale) Can you think of any improvements to meet the needs of EQUINET's diverse members better?
4. The Commission, as principal funder, likes to define work quality in terms of its timeliness, the accuracy with which it is executed and how useful the work was. Taking each of the main work areas in turn, what is your view of their timeliness, accuracy and usefulness, ie their quality and impact? (Score 1-10, where 1 is very poor and 5 is exemplary)<sup>3</sup>

Service offering	Timeliness	Accuracy	Usefulness
1. Trainings			
2. Seminars			
3. Working groups			
4. Communications			
5. Publications			

<sup>2</sup> The new strategic plan isn't yet up on the site <http://www.equineteurope.org/-Strategic-Plans-Annual-reports->

<sup>3</sup> This question is designed to support assessment for PROGRESS funding, assuming the categories for work quality assessment are as before. If they have changed or been eliminated, this question can be revised or scrapped. Please advise.

## 3.1

## REPORT OF EXTERNAL TECHNICAL EVALUATION OF 2014 ACTIVITIES FOR EQUINET

5. To what extent do you feel that the effectiveness of your organisation is enhanced as a result of the work and presence of Equinet? (1-5 rating scale) Reflections?
6. To what extent do you feel that your organisation is better equipped to engage at the European policy level as a result of Equinet's work and presence? (1-5 rating scale) Reflections?
7. How influential do you feel Equinet is as a result of its policy contributions and legal documentation? (1-5 rating scale) Reflections?
8. How well is Equinet governed? (1-5 rating scale) Reflections?
9. To what extent is Equinet financially self-sustaining in terms of the adequacy of its funding but also the diversity of the sources of its funding? (1-5 rating scale) Reflections?
10. To what extent do you believe that the Secretariat operates efficiently in terms of its key administrative functions (reimbursements, membership questions, answering requests, etc)?
11. To what extent is the Secretariat performing its role well? (1-5 rating scale) What are the next steps for its development?
12. To what extent is decision-making in the network efficient and appropriately inclusive? (1-5 rating scale) Reflections?
13. To what extent is Equinet well positioned vis-à-vis at the European and International level? (1-5 rating scale) Reflections?