DELIVERABLE 3.1

Monitoring and evaluation methodology

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1. Introduction

1.1 NEXUS: project description, aims and objectives

The NEXUS project co-designs, implements, monitors and evaluates innovative and targeted actions aimed at bridging inclusivity gaps in nine research organisations and their respective research and innovation ecosystems, with the aim of fostering institutional change through the development of inclusive Gender Equality Plans (GEPs) in intersectional and intersectoral directions. Geographical inclusiveness is also promoted through a highly context-sensitive approach to action piloting in seven Member States and in Associating Countries, covering Western, Central, Southern and South-Eastern regions. The project sets up structures in less experienced institutions to go beyond the minimum GEP requirements, as defined in the Horizon Europe eligibility criterion, through a participatory, multi-stakeholder process of solution co-creation sustained by a twinning scheme (consisting of three groups of three implementing partners, referred to as 'Twin trios') and the delivery of tailored capacity building and training programmes. NEXUS analyses how implementing partners with newly set up GEPs perform data collection, internal assessment and the planning of GEP measures to identify areas of improvement as well as potential challenges in enhancing an inclusive approach. This analysis informs the co-design and implementation of new innovative inclusive actions, underpinned by the principles of intersectionality and intersectoriality.

An intersectional approach takes into account not only inequalities on the basis of sex and gender, but also those arising from other social identities and characteristics (such as race, age, sexual orientation, religion, socio-economic status and disability) that overlap and interact in complex systems of privilege and disadvantage. In the context of institutional change, such an approach enables a more nuanced understanding of organisational dynamics and more effective policies (for a detailed overview of the intersectional approach used in the NEXUS project, see D2.1). An intersectoral approach recognises the importance of links between sectors and organisations. In Research & Innovation, these include universities and other RPOs, RFOs, public sector organisations, NGOs, professional associations and private companies. Intersectoriality, understood as developing and strengthening partnerships among diverse actors, can enable greater impact in tackling inequalities.

Overall, NEXUS actions will enhance the research excellence of participating organisations as well as effecting institutional and cultural change that is context-sensitive, realistic and sustainable.

The project is structured in three phases: (1) inclusiveness assessment, (2) solution co-creation, and (3) implementation and GEP refinement (see Figure 1). This deliverable supports activities to be conducted as part of the third phase, specifically in the scope of Work Package (WP) 3, *Pilot actions implementation, evaluation and GEPs refinement*, which encompasses the project's monitoring, evaluation and redesign components.
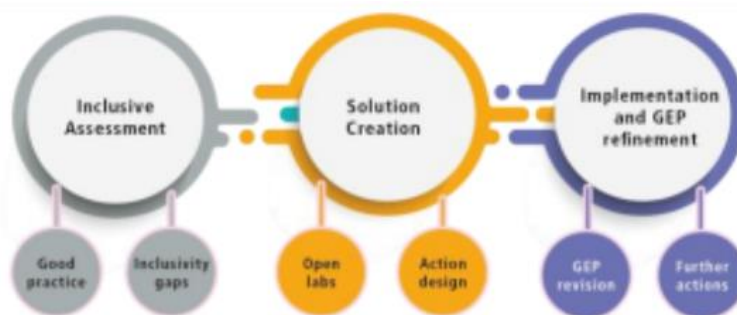
Figure 1: NEXUS phases

1.2 Purpose, scope and structure of the deliverable

This deliverable outlines the monitoring and evaluation methodology for the innovative and targeted actions aimed at bridging inclusivity gaps in research organisations. In total, a minimum of 45 pilot actions (new or advancements of existing actions) will be implemented over the course of 13 months, M9-21 (May 2024-May 2025) as part of the NEXUS project. The scope of this deliverable, under T3.2, *Monitoring, evaluation and ongoing redesign*, is to define a common methodology for the monitoring and evaluation process for NEXUS implementing partners, as well as to provide practical guidelines on the formative and summative evaluations.

The formative evaluation will assess the commitment of senior decision-makers in each institution, the progress made in the implementation of actions, and whether these deliver their expected outputs and outcomes in terms of inclusivity dimensions. Quarterly Evaluation and Redesign workshops will take place, both within each partner's Gender Equality Plan (GEP) working group (for actions designed individually) and within each NEXUS Twin trio (for actions designed jointly). The monitoring and evaluation process will ensure that, following a dedicated methodology, a continuous adjustment and redesign of the actions will reflexively accompany the iterations integrating the results from the formative evaluation, which will be reported in D3.2 (*Formative evaluation mid-term results*, M16, December 2024).

The summative evaluation (M22) will take place via a programme of in-depth, online interviews and focus groups. Summative evaluation activities will take place with selected staff members, including middle and top management as well as a selection of external stakeholders engaged in collaborative actions. The results of the summative evaluation will be reported in D3.3 (*Pilot action results*, M23, July 2025).

This deliverable provides a methodological background, followed by the methodology and practical guidance on three components: monitoring, formative evaluation and redesign process, and summative evaluation.

1.3 Relation to other tasks and work packages

The methodology presented in this deliverable as part of T3.2, *Monitoring, evaluation and ongoing redesign*, goes hand in hand with the other tasks in WP3, *Pilot actions' implementation, evaluation and GEPs' refinement*. It will support T3.1, *Inclusive pilot actions implementation*, by offering concrete ways to assess the advancement of implementation. It will also prepare the ground for

T3.3, *Innovating GEPs towards sustainability*, by setting the framework to derive lessons learnt from implementation. The final products of monitoring and evaluation will enable partners to reflect on the next steps to take in order to ensure the sustainability of the implemented actions.

This deliverable is informed by the tasks carried out as part of WP2 (*Analysis of inequalities and co-design of solutions*). D2.1 presented the findings from T2.1, *Analysis of good practices and existing GEPs to strengthen inclusiveness*, and T2.2, *Analysing inequalities*, reporting on good practices and on the comparative mapping of inequalities. This work provides key insights into the data collection, monitoring and evaluation infrastructure at the partner institutions, as well as existing gaps and challenges. D2.1 also provided useful insights on good practices for prioritising inclusivity in monitoring of GEPs. By identifying inclusiveness gaps in existing GEPs, WP2 also feeds into the design of new inclusive GEP actions. The approach used in co-designing GEP actions, developed as part of T2.3, *Stakeholders engagement and solutions co-creation*, is also used to structure the monitoring and evaluation process, ensuring a cohesive approach.

The methodology presented in this deliverable is also connected to WP4 (*Capacity-building, mutual learning and knowledge sharing*), and specifically to T4.1, *Ongoing support and capacity building.* One of the training sessions targeting the multipliers at each partner institution will focus on integrating monitoring and evaluation as building blocks of GEPs, and on implementing the monitoring and evaluation methodology. In addition, capacity-building, mutual learning and knowledge sharing will be informed by the evaluation process: the formative evaluation will explore advancement in the implementation of actions in relation to the internal and external knowledge and skills that are needed for their implementation. As a result, specific formative needs will be identified and addressed. Part of the monitoring and evaluation process will take place in the context of Twin trios, who collaborate as part of T4.2, *Twinning programme*.

2. Methodological background

2.1 Programme theory

The monitoring and evaluation methodology presented in this deliverable relies on the **programme theory** of each action developed as part of the design stage. A programme theory is "the construction of a plausible and sensible model of how a programme is supposed to work" (Bickman, 1987, p. 5). It does not refer to a single theory, but rather to one developed for each programme or action. In order to avoid "relying on intuition and assumption" (Bickman, 1987, p. 6), it is important, in the design stage, to make explicit the "chain of causal assumptions linking programme resources, activities, intermediate outcomes and ultimate goals" (Wholey, 1987, p. 88). The model describing the resources, activities, outputs, outcomes and impact of an action is built in the form of a **logic model** (Funnell & Rogers, 2011; Knowlton & Philips, 2012; Savaya & Waysman, 2005). The logic model is a management tool used to structure the key elements of an action and identify the causal relationships between them, providing the grounds to plan, implement, monitor and evaluate an action (OECD, 2023). Figure 2 presents the structure of logic models.
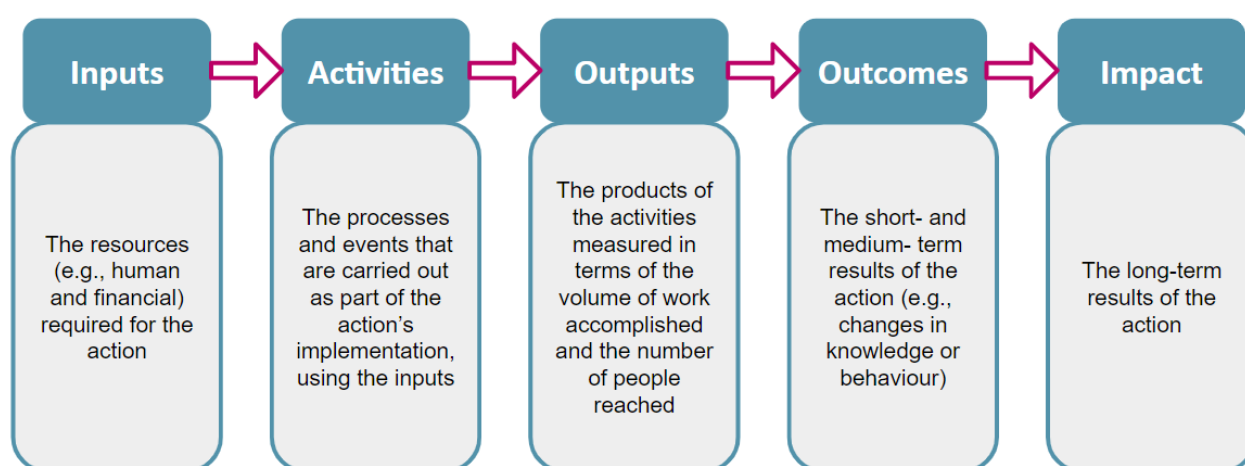
Inputs	Activities	Outputs	Outcomes	Impact
The resources (e.g., human and financial) required for the action	The processes and events that are carried out as part of the action's implementation, using the inputs	The products of the activities measured in terms of the volume of work accomplished and the number of people reached	The short- and medium- term results of the action (e.g., changes in knowledge or behaviour)	The long-term results of the action

Figure 2: Structure of the logic model (Knowlton & Philips, 2012; Sangiuliano & Schredl, 2021; Savaya & Waysman, 2005; UN Women, 2015)

In this deliverable, the term **action** is used to refer to each of the innovative and targeted measures aimed at bridging inclusivity gaps in research organisations designed by the implementing partners as part of the NEXUS project. Monitoring and evaluation activities enable insights into whether an action is being implemented as planned and whether its outcomes align with the action's planned objectives (Dahmen-Adkins & Peterson, 2019).

Monitoring is a continuous process involving systematic data collection on specified indicators. It provides information to management and key stakeholders on the extent of implementation progress, the achievement of objectives and the use of allocated funds (OECD, 2023). It offers understanding of the action's status and progress, enabling corrections and improvements (Dahmen-Adkins & Peterson, 2019). It is also a means for transparency and accountability (Sangiuliano & Schredl, 2021). Monitoring relies on **indicators**, defined by the OECD (2023) as "quantitative or qualitative factor[s] or variable[s] of interest" (p. 38) that relate to the action and

its results, or to the context in which it takes place, and they are "a simple, verifiable, and reliable means" (p. 46) to measure performance.

Differently from monitoring, **evaluation** occurs at specific points in time during implementation (UNESCO, 2023). A **formative evaluation** takes place during implementation, with the goal of improving the delivery of the action (OECD, 2023; UN Women, 2015). It can inform a **redesign** process, whereby an action is adjusted and fine-tuned to better achieve its objectives. A **summative evaluation** takes place upon the completion of an action, to determine the degree to which it achieved its objectives (OECD, 2023). Evaluation is in-depth, systematic and objective, and its goal is to assess the design, implementation and results of an action, as well as to establish its significance (OECD, 2023).

Monitoring targets and evaluation targets are distinct, as monitoring targets focus on the implementation level, while evaluation targets also reflect the strategic level (considering, for instance, the alignment between impact and the targets set out in the design stage) (EIGE, 2023). However, the two levels are connected. A good monitoring system supports good evaluations, as it contributes quality data on implementation (UNESCO, 2023). Nonetheless, achieving monitoring targets does not necessarily imply that evaluation targets are also achieved. For example, a monitoring target may be achieved if a set number of staff members participate in an unconscious bias training as planned, but the evaluation target of increasing competence in recruitment may not have been reached if the training itself was low-quality (EIGE, 2023).

The methodology presented in this deliverable covers monitoring, the formative evaluation and redesign process, and the summative evaluation activities.

2.2   Findings from D2.1

In the context of the NEXUS project, it is essential to adapt the methodological background based on findings about partner institution GEPs and existing monitoring and evaluation practices. The NEXUS project operates in contexts where GEPs are already present; as a result, it is important to draw from lessons learnt through the comparative analysis carried out as part of the first phase of the project, which focused on identifying good practices and inclusivity gaps.

Findings from D2.1 show that existing practices for GEP action monitoring and evaluation vary among partners and are not always clearly defined. In some cases, partners monitor the status of gender equality within the institution, but no specific monitoring for GEP actions is foreseen; in other cases, the boundary between the two is blurred. D2.1 points out the interrelationship between institution-level data collection and national or supra-national regulations, which may facilitate or pose challenges for monitoring. Institutional commitment was found to have a key role. Common challenges include the cultural and institutional value attributed to inclusivity, and the "lack of centralised and unified procedures for data collection and analysis" (NEXUS D2.1, p. 55).

D2.1 offers principles for data collection, according to which the data collection should be: regular and sustainable to monitor change and acquire up-to-date information; ethical to protect the privacy and other rights of those who are involved; gender-sensitive and considerate of different intersectional inequalities for ensuring inclusivity. Further information on collecting data for

enhancing inclusivity in RPOs is available in D2.1, Section 6.2. For an overview of possible obstacles, see D2.1, Section 6.4.

D2.1 provides considerations on how to plan quality, impactful monitoring, underlining that monitoring can be challenging due to difficulties involved in data collection. In the context of inclusive GEPs, it is important to ensure that data are collected with an intersectional inclusive approach, seeking to document the experiences of all relevant actors. This can be facilitated by developing varied data collection instruments (both quantitative and qualitative) to facilitate the refining of GEP actions. In addition, broader policies and structures can affect the extent to which different actors (e.g., staff and students) feel safe and comfortable in sharing their experiences. These include organisational policies to address discrimination, access to equality, diversity and inclusion trainings, as well as facilities, digital tools and support measures accessible to all. Monitoring practices are therefore embedded in the context of the institution and affected by existing measures and policies. This is why a wide institutional effort for inclusive organisational cultures is needed.

By means of self-evaluation forms on the general characteristics of the partner institutions and the institutional approach to intersectionality, D2.1 reports that intersectional inequalities are often not taken into account, and that all partners identified gaps and obstacles concerning inclusive data collection. Most partners focus almost exclusively on gender in data collection for GEP development. D2.1 highlights that "this gap needs to be addressed not only in the GEP actions themselves, but also in relation to data collection practices, which are currently not sufficiently intersectional" (NEXUS D2.1, p. 9). D2.1 proposes considering different dimensions of inequality when collecting data for GEPs. These include age, sexual orientation, gender identity, race, ethnicity, disability, religion, and socio-economic status. This approach should enable highlighting how different axes of inequality overlap.

In terms of intersectoriality, D2.1 reports that several partners did not involve stakeholders in data collection during the development of GEPs. Overall, public authorities were the stakeholder that was most often involved, while less collaboration took place with other types of stakeholders (e.g., other RPOs/RFOs, CSOs, private companies). D2.1 lists various dimensions of possible collaborations between different sectors in data collection and analysis. For example, GEP goals can be set with reference to public data on gender equality at the national level. In addition, support from other institutions, such as research companies or national statistical offices, can strengthen the methodological approach to data collection.

Based on the findings reported, D2.1 summarises the steps for inclusive data collection and analysis as follows in Figure 3. D2.1 indicates that these steps should be used as a guideline to design, monitor, evaluate and redesign GEP actions, highlighting that both the intended and the unintended consequences of GEP actions should be measured.
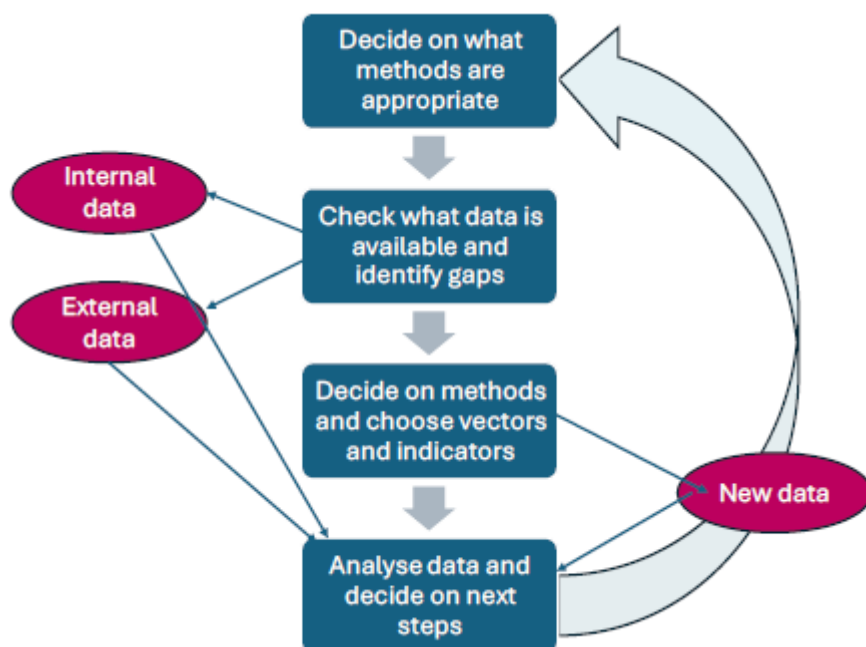

Figure 3: Steps for inclusive data analysis (NEXUS D2.1, p.71)

As a result, this methodology invites partners to follow these steps when defining data sources for monitoring and evaluation purposes. It is particularly relevant for those actions that aim to intervene on the institution's data collection practices.

2.3   Alignment between design, monitoring and evaluation

While evaluation occurs at specific moments in the implementation cycle, it is an integral part of the action that is embedded from the beginning (Kingsley, 2020), to ensure alignment and coherence. Harmonisation between design and monitoring and evaluation activities is therefore crucial (Sangiuliano & Schredl, 2021).

Alignment between design, monitoring and evaluation is achieved by designing the action, as well as the monitoring and evaluation activities, with reference to the same programme theory and logic model. This allows for the planned outputs, outcomes, and impact of the action to be used to set up monitoring indicators that will help to determine the extent to which the action was implemented successfully. For actions with an intersectional or intersectoral component, it is important to also reflect intersectional and intersectoral aspects in the monitoring and evaluation activities.

As part of the NEXUS project, as outlined in the *Guidelines for the implementation for the Open Labs and the actions' design*, each partner will design and implement five new actions (or advancements of existing GEP actions). The design of the actions takes place at three different levels: within the Open Labs, within the Twin trios, and at the institutional level. The finalisation

of the design of all five actions will happen at the institutional level, also considering that even jointly designed actions will likely require adaptation by each institution. After the finalisation of the actions at the institutional level, partners will develop monitoring indicators for the actions, following the considerations laid out in Section 2.4.

2.4   Defining monitoring indicators

On the basis of the logic model, a key step in creating a monitoring strategy is identifying concrete indicators (EIGE, 2023) and respective data collection tools (Dahmen-Atkins & Peterson, 2019).

Building on the action objectives defined during the co-design of actions, individually, each partner will develop monitoring indicators to track implementation, adapting the objectives to the specific context of their institution. As indicators rely on the objectives and outcomes developed during the co-design phase, outcomes should meet SMART requirements (see Figure 4) to facilitate the development of monitoring indicators: they should be specific, measurable, achievable, relevant and timed (Bjerke & Renger, 2017; Obgeiwi, 2017). Similarly, indicators should have the same characteristics, in order to be concise and tangible (Sangiuliano, Cescon, Palmer & Müller, 2021).

Figure 4: Guiding questions to support the development of SMART objectives (Sangiuliano et al., 2021)

There are different types of monitoring indicators (see Table 1), which are derived from the **output** and **outcome** sections of the logic model. Different data collection tools and different data sources characterise different types of indicators. All three kinds of monitoring indicators will have to be developed for each action.

Indicator type	Description	Tools and testing options	Sources
Output indicators (direct services, products or events produced by the action)	Output indicators provide a simple and numerical measurement or tracking of the direct material result of the action. For example, they could report the number and type of training activities carried out and the number of participants. The documentation of output indicators does not require specific data collection tools.	Documentation, such as: • Participant lists. • Action implementation records. • Any guidelines produced for the action.	Intervention organisers
Short-term outcome indicators	Short-term outcome indicators (based on previously established SMART objectives) capture the immediate short-term effects of an action (<1 year). This may require data collection tools to measure, for example, a change in skills, knowledge or awareness resulting from a training activity.	Polls, questionnaires, organisational statistics and indicators. Testing options include: • **Post-test**: Data are collected after participation. Participants take part (e.g., in a training activity) and are tested afterwards. • **Pre-test/post-test**: Participants receive a pretest, take part in the action (e.g., training activity) and receive a post-test afterwards. The results of the pretest and post-test are compared. The difference assesses how much change the action achieved. • **Retrospective pre-test/post-test**: A variation of the pre-test/post-test design. Participants take both a pre-test and a post-test. Participants report their prior ideas retrospectively (pre-test) and their current ideas (post-test). For example, participants may be asked how they felt about their skills before taking part, and how they feel about their skills now.	Beneficiaries, participants
Medium-term outcome indicators	Medium-term outcome indicators (based on previously established SMART objectives) track changes over longer periods of time (1-2 years). This may be more complex, as different factors may play a role in influencing outcomes.	Polls, questionnaires, interviews, organisational statistics and indicators. Testing options include: • **Time series**: Another variation of the pre-test/post-test design. Data are collected at regular time intervals. Participants are tested before, during and after the action. The test results are compared to assess change over time.	Beneficiaries, participants

Table 1: Types of monitoring indicators (Sangiuliano et al., 2021)

When setting up monitoring indicators, good practices should be taken into account. Dahmen-Adkins & Peterson (2019) outline eight guiding principles for monitoring:

1. **Make monitoring an integrated part of the action.** Monitoring should be considered a core part of the project, and monitoring activities should be planned hand in hand with the action itself.

2. **Combine a deductive approach with an inductive one.** Both primary and secondary data should inform the development of the monitoring process, ensuring both rigour and flexibility. Primary data are unique to the action and did not exist beforehand. Questionnaire responses submitted by the participants/beneficiaries of an action, or data collected via focus groups, are examples of primary data. Secondary data are those that have already been collected and are available. Existing data from national statistical offices or HR offices, as well as scientific publications, are examples of secondary data.

3. **Combine qualitative and quantitative tools.** A range of tools and data types should be used in the context of monitoring, based on their suitability to the action itself. Qualitative tools include desk research, focus groups and open-ended questions in semi-structured interviews and questionnaires. Quantitative tools include organisational statistics, numerical indicators, and closed questions in semi-structured interviews and questionnaires.

4. **Tailor-make monitoring tools.** Monitoring should be adapted to the specific local context in which the action will be implemented, and specific monitoring tools should be developed. For example, an action that consists in delivering a training on unconscious bias may be monitored through a questionnaire developed specifically for the training participants, with questions reflecting the structure of the training itself as well as the content covered. Numerical indicators on the specific activities planned (e.g., number of preparatory documents finalised, number of facilitators recruited) should also be developed with reference to the action's characteristics.

5. **Collect diverse and varied data.** Data should be collected from a broad and diverse range of actors, to ensure a comprehensive effort. For example, interviews and focus groups can be used to gather data from action organisers, management, other staff in the organisation, action beneficiaries/participants, and/or external stakeholders involved in the organisation of the action. Polls and questionnaires can also be used with a variety of actors, such as beneficiaries/participants and organising actors. Secondary data can be acquired from a variety of sources, such as scientific publications, national statistical offices or institution-level sources.

6. **Make monitoring a collaborative effort.** All organisers should be involved in monitoring, not just for data collection but also for data analysis.

7. **Adapt to the project phases.** Monitoring tools should reflect the stage of action implementation and be timed accordingly.

8. **Allocate sufficient resources to monitoring activities.** Sufficient time and financial resources should be allocated for monitoring activities.

These principles are useful points to consider and strive towards when creating a **monitoring and evaluation plan** (see Section 3.1). Below (Table 2) is an example outlining hypothetical monitoring indicators for an action reported as part of D2.1 organised by Mission "Women-Men Equality".

Action	Activities	Output indicator (Tool: documentation)	Short-term outcome indicator	Medium-term outcome indicator
Workshop on unconscious cognitive biases in recruitment	Establish workshop guidelines and documents	Number and scope of workshop guidelines/documents developed	Increased clarity about the logistics, benefits, opportunities and challenges of the workshop **Tool:** polls conducted with workshop facilitators about clarity and usefulness of guidelines/documents	Increase in materials available for next workshop iteration; sustainability of the workshops **Tool:** documentation
	Recruitment of workshop facilitators	Number of workshop facilitators recruited		
	Hold training for workshop facilitators	Number of trainings for workshop facilitators held; number of participants; gender and age of participants	Increased awareness of workshop content and of the facilitator's role; increased awareness of potential challenges and adjusted expectations **Tool:** post-test questionnaire completed by workshop facilitators	Experienced facilitators; expansion of professional networks; sustainability of the workshops **Tool:** time-series questionnaire results completed by workshop facilitators
	Conduct the workshops	Number of workshops held; number of participants; role of participants within the institution; gender and age of participants	Increased awareness of unconscious cognitive biases in recruitment; fairer, less biased recruitment **Tool:** pre-test/post-test questionnaire completed by participants	More diversity in terms of gender, race, and disability of new hires. **Tool:** organisational statistics
	Evaluate the results of the workshop	Number of post-test questionnaires submitted by participants	Understanding of challenges and obstacles in the workshop **Tool:** post-test questionnaire completed by participants	Improved workshops **Tool:** comparison of post-test questionnaire results by participants between workshop iterations

Table 2: Example of hypothetical monitoring indicators, based on an action presented in D2.1

3. Methodology and practical guidelines

Evaluations assess three aspects of an action: how the action was designed, whether it was implemented efficiently, and whether it achieved the outcomes and impacts it aimed to achieve (Sangiuliano et al., 2021). Evaluating these three components involves the use of both quantitative and qualitative data, collected via a range of tools. Good evaluations also contain reference to both primary data, such as interview data from the audience of an action, and secondary data, such as findings from existing scientific publications. As outlined in D2.1 of the NEXUS project, in the context of an intersectional GEP, attention must be paid to the data collection approach employed. In addition, cooperation and consultation with stakeholders is key.

3.1 Monitoring and evaluation plan

Each partner will have to develop a monitoring and evaluation plan tailored to the five actions they will implement as part of the NEXUS project. The monitoring and evaluation plan will outline the monitoring and evaluation process in alignment to the project timeline. For the monitoring component, it will define monitoring indicators and respective tools to track the implementation progress. For the evaluation component, it will present the evaluation activities that will be carried out for each action, as well as their timing. A template for partners to develop their own monitoring and evaluation plan is available in Annex 1 and should be completed by the middle of M10 (by Friday 14th June 2024 COB). Indicators will be developed and owned by each implementing partner, as they are specific to the action objectives and activities in the context of their institution. **Monitoring data should be updated at least every three months** using the dedicated monitoring spreadsheet template (see Annex 2).

Overall, five actions per partner (or advancements of existing GEP actions) will be designed and implemented during one implementation cycle. All the actions will adopt an intersectional approach, while at least two actions per partner will have a strong intersectoral component, and at least one action will concern inclusive data collection processes at the institutional level. The monitoring and evaluation plan will be built around the project timeline (see Figure 5). The implementation process will consist of one single cycle starting in M9 (May 2024) and ending in M21 (May 2025).

The next sections cover the formative evaluation and redesign process (Section 3.2) and the summative evaluation activities (Section 3.3). The formative evaluation and redesign process includes two sub-sections, the first on Evaluation and Redesign workshops (Section 3.2.1) and the second on formative evaluation activities (Section 3.2.2). This distinction is due to the formative evaluation and redesign process encompassing multiple components. The first component, made up of Evaluation and Redesign workshops, concerns regular meetings that will take place both in the context of Twin trios and at the institutional GEP working group level, to evaluate the actions being implemented based on cross-cutting topics that will be considered in each meeting, and adjust the course of the actions based on meeting outcomes. The second component concerns the formative evaluation activities (such as focus group, interviews, etc.) that will be carried out to evaluate each action. These activities will take place in two rounds: the first will provide insights into the first half of the implementation process, while the second will provide insights into the second half of the implementation process.
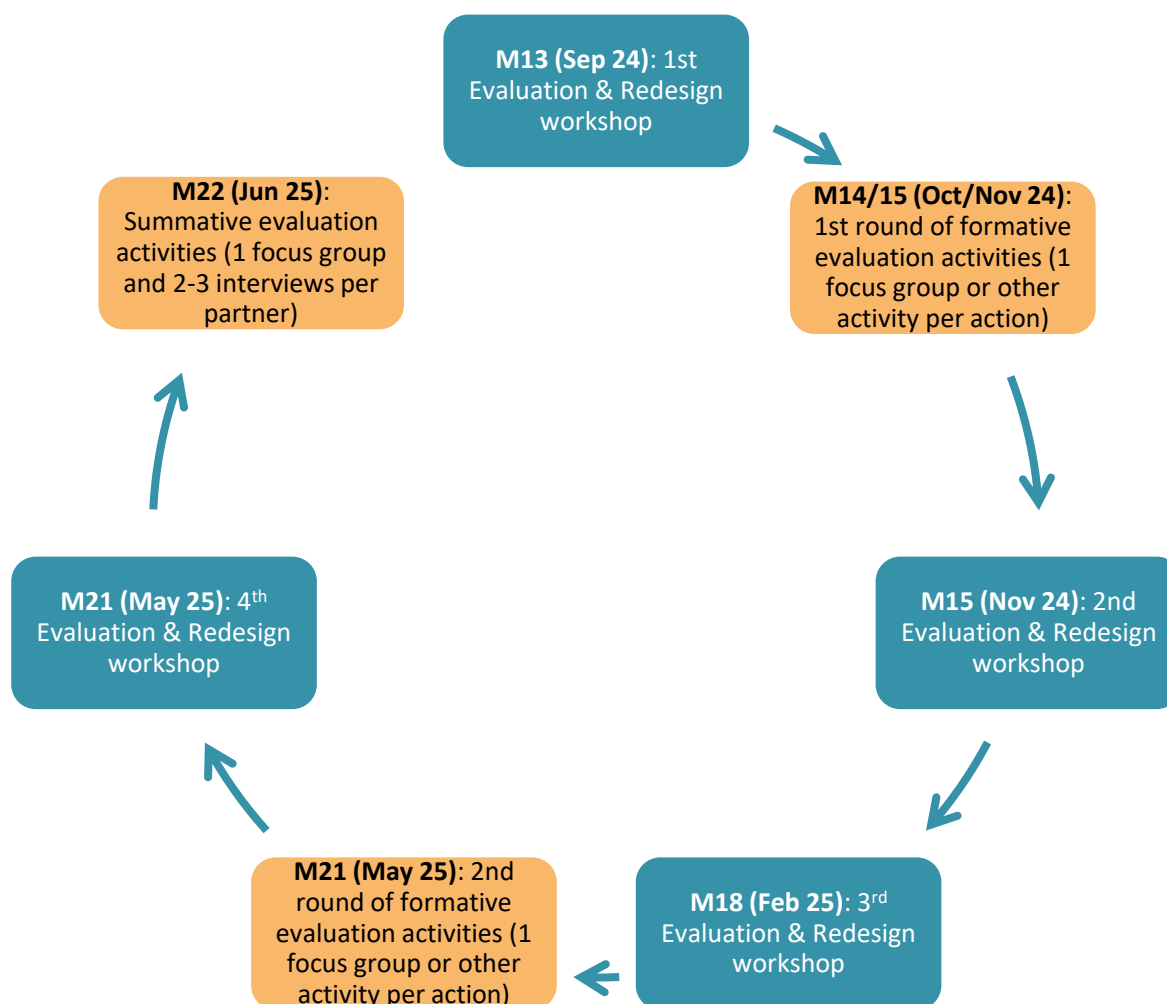
Figure 5: NEXUS implementation cycle diagram

3.2 Formative evaluation and redesign process

This section provides practical guidelines to NEXUS partners for carrying out the formative evaluation. The formative evaluation will assess the commitment of senior decision-makers in each institution, the design of actions, and the progress made in their implementation. It will also embed an ongoing and reflexive redesign process, throughout the whole implementation process. Each institution's GEP working group will meet every three months, in the framework of redesign workshops, and use the mid-term results of the formative evaluation (M16, December 2024) to reflect on the implemented actions and to adjust them. The actions developed by the NEXUS Twin trios will also be evaluated collectively in the frame of ad-hoc evaluation and redesign workshops which will take place every three months. Formative evaluation mid-term results will be reported in D3.2 (*Formative evaluation mid-term results*).

3.2.1 Evaluation and Redesign workshops

Regular monitoring sessions are useful for considering monitoring data and steering the process effectively (EIGE, 2023). Quarterly Evaluation and Redesign workshops will take place both within each partner's GEP working group (for actions designed individually) and each NEXUS Twin trio (for actions designed jointly). Therefore, two workshops need to take place at each indicated

deadline (one within each GEP working group, and one within each Twin trio). The monitoring and evaluation process will ensure that a continuous adjustment and re-design of the actions will reflexively accompany implementation integrating the results from the formative evaluation. Each Twin trio and partner institution is invited to adjust and calibrate actions based on the implementation process. Below is an overview of the content and structure for the four Evaluation and Redesign workshops. Twin trios can choose to embed one or two of the Evaluation and Redesign workshops in the study visits if they wish so, otherwise the workshops will take place online. A reporting template on activities carried out during the Evaluation and Redesign workshops is available in Annex 3.

Why

The purpose of the workshops is to sustain a reflexive redesign process and continuous adjustment of the actions to accompany the implementation.

Who

The workshops will take place in parallel streams. On the one hand, Twin trio participants will meet to evaluate actions jointly designed. On the other hand, GEP working groups within partner institutions will meet to evaluate actions designed outside the Twin trios. The internal staff involved in the design of the actions are expected to be involved also in the evaluation of the design during Evaluation and Redesign workshops.

When

Workshops should be scheduled to take place approximately every three months, following this schedule: M13 (September 2024), M15 (November 2024), M18 (February 2025), and M21 (May 2025).

What

Each workshop will be made up of the following cross-cutting topics: evaluating the action's design, discussing the action's monitoring indicators, and evaluating resistances to implementation. In addition, based on the stage of the implementation, a timeline-specific topic will be discussed during each workshop. Lastly, discussion will take place on how to adjust the course of the action based on ideas exchanged during the workshop.

How

Cross-cutting topic	Description/guiding questions
Evaluating the action's design by revisiting the logic model and template for the design of actions	Evaluating how well an action was designed takes place predominantly via desk research. If the evaluation is conducted internally by the GEP working group who developed the action, answers to the evaluation questions will be readily available. This stage of the evaluation focuses on the structure of the action as developed during the design process. It is recommended to conduct this exercise with reference to the action's logic model and template for the design of actions (as presented in the *Guidelines for the implementation of the Open Labs and the actions' design*). The following questions can support an evaluation of the design (based on the methodology outlined in the CALIPER project: Linking research and innovation for gender equality, Sangiuliano et al., 2021): • Do the planned activities meet the needs of the target audience?

	• Do the planned activities align with the action's planned outcomes and impact? • Do the action's planned outputs and outcomes meet SMART requirements (see Figure 4)? • Are the resources allocated to the action sufficient and well-suited to the action's planned outputs and outcome? • What are the knowledge and skills required for the implementation of the action? Are these skills present among the organisers? If not, what are the learning needs? • Does the design of the action contain inclusive dimensions? In what ways? • Is the action timeframe realistic? • Does the overall design of the action align with the institutional context (e.g., policy context, organisational context)? What are the supportive and disruptive contextual factors at the institutional level? • Is the design of the action informed by past actions implemented in the institution? • Who are the actors involved in the action? Is there top management commitment in support of the action? Does the action rely on collaboration with external stakeholders?
Discussing the action's monitoring indicators	Revisit the monitoring spreadsheet for each action answering the following: • Which indicators are up-to-date, and which need to be updated? • What picture do the up-to-date monitoring indicators paint of the action's implementation? • Based on available monitoring data, to what extent is the action's implementation on track?
Evaluating resistances to implementation	For each action, consider: • To what extent has the action encountered resistance within the institution? • Which actors is resistance coming from? • Which measures can be taken to address resistances?
Timeline-specific topic	Each workshop will have an additional topic reflecting the stage of implementation: • M13 – Monitoring and evaluation plans: Which monitoring indicators and evaluation activities did you select for each action? Are there any challenges you envision in terms of the monitoring and evaluation process? • M15 – Formative evaluation activities: How was the experience of conducting focus groups or other formative evaluation activities? What challenges were encountered, and what would you do differently in the second round of formative evaluation activities? • M18 – Lessons learnt from the formative evaluation: What do the findings form the formative evaluation say about the action? What can be done to improve and strengthen the action in the second part of the implementation period? • M21 – Towards sustainability: As we reach the end of the implementation cycle, how do you envision the action progressing in the future? What measures can be taken to support the action's sustainability?
Adjusting the course of the action on the basis of the discussion	Based on the overall discussion, outline any changes or adjustments to the actions in terms of their design or implementation.

Table 3: Topics to be covered in the Evaluation and Redesign workshops

3.2.2 Formative evaluation activities

Formative evaluation activities will be carried out to evaluate each action. These activities will take place in two rounds: the first (M14/15, October/November 2024) will provide insights into the first half of the implementation process, while the second (M21, May 2025) will provide insights into the second half of the implementation process.

The formative evaluation activities should seek to provide answers to the following questions (Sangiuliano et al., 2021):

- Does the implementation of the action correspond to the objectives?
- Is the implementation of the action meeting its intersectional objectives?
- Have activities been carried out as foreseen?
- To what extent has implementation changed over time? What has changed?
- How are responsibilities for the implementation of the action distributed?
- What are the knowledge and skills required for the implementation of the action? Are these skills present among the organisers? If not, what are the learning needs?
- What are the main decision-making bodies involved with the implementation of the action? Is there a commitment from top management?
- Have any institutional bodies or mechanisms been established to implement the action?
- What factors inhibit or promote the implementation of the action in line with its objectives?
- What barriers were encountered during implementation? Was it possible to overcome these barriers and how?
- Is the implementation of the action encountering any resistances? Where are they coming from? Are they implicit or explicit, and how are they being handled?
- Which external actors have been involved?

In each round, **at least one evaluation activity per action should be carried out**. The activity could be a focus group, organised with key actors involved including beneficiaries/participants (which may be organised online), an evaluation questionnaire, or a set of interviews carried out with key actors. The choice of activity should depend on the action and on its characteristics. For example, a questionnaire may be more suited for actions such as trainings or events (for an overview of questionnaire types, see Table 1). The selected formative evaluation activity for each action should be set in the monitoring and evaluation plan (see Section 3.1). The results of formative evaluation activities will be summarised and analysed by each partner into an overall formative evaluation report (see Annex 4).

The second round of formative evaluation activities will provide more insights into the extent to which the anticipated outcomes were produced by an action. Given the timeline of the NEXUS project, this round of formative evaluation will focus on short-term outcomes of the actions. The focus of the second round will be on demonstrating the contribution of the action, while also understanding the configuration of activities, actors and contextual factors that are likely to have had an influence. Structural change is complex and there can be considerable lag between actions and their impact. This is why it is important to continue collecting data in the long term. The second round of the formative evaluation will place special emphasis on the following questions:

- Which outputs, outcomes (intended and unintended) in terms of gender equality were the result of the action?
- Which intersectional and/or intersectoral outcomes (intended and unintended) were the result of the action?
- To what extent were the expected outcomes of the action achieved?
- Which facilitating and hindering contextual factors affected the outcomes of the action?

The documentation, to be uploaded to the project SharePoint by each partner and made available to Frederick University in preparation of D3.2, *Formative evaluation mid-term results*, by the end of M15 (November 2024), will include:

- The monitoring and evaluation template with up-to-date indicators collected for each action;
- An up-to-date reporting template on activities carried out during the Evaluation and Redesign workshops;
- The formative evaluation report (with information from the first round of formative evaluation activities completed).

3.3 Summative evaluation activities

The summative evaluation (M22) will take place via a programme of in-depth, online interviews and focus groups with selected staff members, including middle and top management as well as a selection of external stakeholders engaged in collaborative actions. The interviews will be carried out by Smart Venice. The results of the summative evaluation will be reported in D3.3 (*Pilot action results*), prepared by Istituto Italiano di Tecnologia (IIT).

The aim of the summative evaluation activities will be to assess three components: institutional commitment, institutional change, and the overall co-creation and intersectoral collaboration process. The summative evaluation will focus on the project process and will not assess each action individually (evaluation at the action level will take place in the two rounds of formative evaluation activities).

Smart Venice will oversee one online focus group per Twin trio, with the three respective GEP working groups participating. In addition, Smart Venice will conduct a minimum of two to three in-depth online interviews with relevant actors (for example, key actors at the implementing partner organisation, such as representatives of the beneficiaries/audience of the actions or top management, or key external stakeholders involved in action design and/or implementation). The results of summative evaluation activities will be summarised and analysed by Smart Venice into an overall summative evaluation report. The questions addressed in the summative evaluation report are the following:

- **Institutional commitment**
  - What was the level of commitment from management to the actions developed as part of the NEXUS project?
  - What is the level of commitment from management to institutional change for alleviating gender inequalities and intersectional inequalities in the

organisation? Has the level of commitment changed during/as a result of the NEXUS project?
- o To what extent were the needed/expected resources for NEXUS actions made available overall? If they were not made fully available, why?

- **Institutional change**
  - o What is the level of institutional change that has taken place as a result of the NEXUS project, the co-design process and collaboration with stakeholders?
  - o How has the institution's GEP been affected by the NEXUS project, the co-design process and collaboration with stakeholders?
  - o How do the new NEXUS actions and the GEP fit within existing DEI frameworks in the institution?
  - o To what extent have the actions become embedded into institutional routine/regulations/processes?
  - o To what extent is there an increased awareness of gender equality and intersectionality in the institution?
  - o Overall, how sustainable are the actions developed as part of the NEXUS project?
  - o How sustainable is the institutional change that has taken place as a result of the NEXUS project?
  - o How has the NEXUS project affected data collection processes at the partner organisation?
  - o Overall, how successful was the integration of an intersectional approach? Were there any repercussions of this approach at the institutional level? How sustainable is the change enacted in an intersectional direction?
  - o Overall, how successful was the integration of an intersectoral approach? Were there any repercussions of this approach at the institutional level? How sustainable is the change enacted in an intersectoral direction?
  - o What were the barriers faced in the institutional change process (e.g., resistances, due to cultural stereotypes; insufficient stakeholders' engagement, ineffectiveness of capacity-building and training efforts; and failed sustainability of project results.)

- **Co-creation process and intersectoral collaboration**
  - o How successful was the co-creation process? How did the co-creation process take place and develop in the Twin trio? What was its impact?
  - o How successful was the development of partnerships with external stakeholders? What was the scope and nature of collaboration with external stakeholders?
  - o What was the impact of the capacity building programme in achieving and sustaining institutional change towards inclusivity?

The documentation to be uploaded to the project SharePoint by each partner and made available to IIT in preparation for D3.3 (*Pilot action results*), by the end of M22 (June 2025), will include:

- The monitoring and evaluation template with up-to-date indicators collected for each action;

- An up-to-date reporting template on activities carried out during the Evaluation and Redesign workshops;
- The complete formative evaluation report (both rounds filled in), based on the formative evaluation activities carried out in both rounds.

Smart Venice will upload the summative evaluation reports (see Annex 5) for all implementing partners by the end of the first week of M23 (Friday 5th July 2025).

IIT will use this documentation to develop D3.3 (*Pilot action results*) by integrating the outcomes of the formative (both rounds) and summative evaluation and reporting on the implementation cycle results for all actions implemented by the partners.

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Annexes

Note: all templates can be accessed by partners in the project SharePoint folder '[Documents/WP3-Pilot actions implementation, evaluation and GEPs refinement/T3.2-Monitoring, evaluation and ongoing redesign/Templates](#)'.

Annex 1. Monitoring and evaluation plan template

Monitoring and evaluation plan – Name of partner

Introduction

Brief introduction on how the plan is structured and the timeframe (with reference to the implementation cycle in D3.1, the monitoring and evaluation methodology).

List and brief description of the 5 actions that will be carried out in the scope of the NEXUS project.

Monitoring activities

For each action, monitoring indicators (output, short-term outcome, and medium-term outcome indicators) should be identified using the format shown in the example on the next page (from the monitoring and evaluation methodology).

In particular, for each action different activities should be set that will lead to the definition of outputs and outcome indicators. Each indicator description should include a mention of the tool that will be used to monitor it (e.g., documentation, interviews, pools, questionnaires, etc.). Each tool should be tailored to the action and its indicators, therefore partners will develop their own tools.

Indicators should be monitored every 3 months, with the exception of medium-term outcome indicators that are only monitored at the end of the implementation period, using a monitoring spreadsheet based on the template.

Action name	Workshop on unconscious cognitive biases in recruitment
Thematic area	3. Gender equality in recruitment and career progression
Is the action concerned with data collection practices?	No
Is the action intersectoral?	No

Activity	Output indicator (Tool: documentation)	Short-term outcome indicator	Medium-term outcome indicator
Establish workshop guidelines and documents	Number and scope of workshop guidelines/documents developed	Increased clarity about the logistics, benefits, opportunities and challenges of the workshop **Tool:** polls conducted with workshop facilitators about clarity and usefulness of guidelines/documents	Increase in materials available for next workshop iteration; sustainability of the workshops **Tool:** documentation
Recruitment of workshop facilitators	Number of workshop facilitators recruited		
Hold training for workshop facilitators	Number of trainings for workshop facilitators held; number of participants; gender and age of participants	Increased awareness of workshop content and of the facilitator's role; increased awareness of potential challenges and adjusted expectations **Tool:** post-test questionnaire completed by workshop facilitators	Experienced facilitators; expansion of professional networks; sustainability of the workshops **Tool:** time-series questionnaire results completed by workshop facilitators
Conduct the workshops	Number of workshops held; number of participants; role of participants within the institution; gender and age of participants	Increased awareness of unconscious cognitive biases in recruitment; fairer, less biased recruitment **Tool:** pre-test/post-test questionnaire completed by participants	More diversity in terms of gender, race, and disability of new hires. **Tool:** organisational statistics
Evaluate the results of the workshop	Number of post-test questionnaires submitted by participants	Understanding of challenges and obstacles in the workshop **Tool:** post-test questionnaire completed by participants	Improved workshops **Tool:** comparison of post-test questionnaire results by participants between workshop iterations

Formative evaluation activities

As indicated in D3.1, the monitoring and evaluation methodology, the formative evaluation activities will take place in two rounds: the first in M14/M15 (October/November 2024), and the second in M21 (May 2025). In each round, at least one specific activity per action should be carried out. A table like the one below should be prepared, showing the formative evaluation activity chosen for each action.

No.	Action name	Formative evaluation activity/tool	Target
1	Workshop on unconscious cognitive biases in recruitment	Pre-test/post-test questionnaire completed by participants	Workshop participants
2	Pink boxes	Focus group	Internal actors involved in the development of the action; representatives of action beneficiaries (e.g., staff members, student representatives)
3			
4			

5		

Questionnaires and *interviews* must be tailored to the specific action, and should be added as annexes to this monitoring and evaluation plan as soon as they have been developed.

Focus group questions should also be tailored to the specific action. Focus group structures/facilitation plans should be included as annexes to this monitoring and evaluation plans as soon as they have been developed. Examples of questions to address in a focus group include:

- *Does the implementation of the action correspond to the objectives?*
- *Is the implementation of the action meeting its intersectional objectives?*
- *Have activities been carried out as foreseen? List the short- and medium-term outcome indicators for each activity.*
- *To what extent has implementation changed over time? What has changed?*
- *How are responsibilities for the implementation of the action distributed?*
- *What are the knowledge and skills required for the implementation of the action? Are these skills present among the organisers? If not, what are the learning needs?*
- *What are the main decision-making bodies involved with the implementation of the action? Is there a commitment from top management?*
- *Have any institutional bodies or mechanisms been established to implement the action?*
- *What factors inhibit or promote the implementation of the action in line with its objectives?*
- *What barriers were encountered during implementation? Was it possible to overcome these barriers and how?*
- *Is the implementation of the action encountering any resistances? Where are they coming from? Are they implicit or explicit, and how are they being handled?*
- *Which external actors have been involved?*

Annex 2. Monitoring spreadsheet template

Action name	
Brief description	
Action timeframe	
Is this a new action or an advancement of an existing action?	
Thematic area (select 1 from drop-down list)	
Intersectional inequalities addressed by the action	
Is the action concerned with data collection practices? (Yes/No)	
Is the action intersectoral? (Yes/No)	
If the action was developed intersectorally, which external stakeholders are involved in the action?	
Was the action co-designed in the Twin trio?	
If the action was co-designed in the Twin trio, what was the level of co-design? (select 1 from drop-down list)	

Activities					Outputs				
Planned	**M12**	**M15**	**M18**	**M21**	**Planned**	**M12**	**M15**	**M18**	**M21**

Short-term outcomes					Medium-term outcomes	
Planned	**M12**	**M15**	**M18**	**M21**	**Planned**	**M21**

Annex 3. Evaluation and redesign workshops reporting template

Evaluation and Redesign workshops report – Name of partner

Introduction

This template is for recording activities carried out and decisions made during the Evaluation and Redesign workshops. Quarterly Evaluation and Redesign workshops will take place both within each partner's GEP working group (for actions designed individually) and each NEXUS Twin group (for actions designed jointly), so two workshops need to take place at each indicated deadline (M13, M15, M18, and M21). The purpose of the workshops is to ensure that a continuous adjustment and re-design of the actions will reflexively accompany implementation integrating the results from the formative evaluation. An overview of the content and structure for the four workshops can be found in D3.1.

This template needs to be filled in with results of the Evaluation and Redesign workshops conducted and uploaded in SharePoint respecting the following deadlines:

- *M15 (November 2024): Reporting results of the first and second workshops.*
- *M22 (June 2025): Reporting results of all workshops.*

Please provide a brief paragraph explaining how the Evaluation and Redesign workshops took place, mentioning the number of workshops carried out so far in both the GEP working group and the NEXUS Twin trio.

Evaluation and Redesign workshops – Twin trios

*This section is for the workshops taking place in the context of **Twin trios**, during which the actions designed jointly are discussed. Each partner should report only the actions co-designed in Twin trios that have been implemented (or are currently being implemented) in their own organisation. For details on the content of the workshop's parts, please see D3.1, Section 3.2.1.*

First workshop – M13

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, the feedback or learning points provided by the partners, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made or under consideration as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Monitoring and evaluation plans – which monitoring indicators and evaluation activities did you select for each action? Are there any challenges you envision in terms of the monitoring and evaluation process?

Adjusting the course of the action on the basis of the discussion

Second workshop – M15

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, the feedback or learning points provided by the partners, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve

implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made or under consideration as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Formative evaluation activities – How was the experience of conducting focus groups or other formative evaluation activities? What challenges were encountered, and what would you do differently in the second round of formative evaluation activities?

Adjusting the course of the action on the basis of the discussion

Third workshop – M18

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, the feedback or learning points provided by the partners, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made or under consideration as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Lessons learnt from the formative evaluation – What do the findings form the formative evaluation say about the action? What can be done to improve and strengthen the action in the second part of the implementation period?

Adjusting the course of the action on the basis of the discussion

Fourth workshop – M21

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, the feedback or learning points provided by the partners, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made or under consideration as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Towards sustainability – As we reach the end of the implementation cycle, how do you envision the action progressing in the future? What measures can be taken to support the action's sustainability?

Adjusting the course of the action on the basis of the discussion

Evaluation and Redesign workshops – GEP working groups

*This section is for the workshops taking place in the context of **GEP working groups**, during which the actions designed outside the Twin groups are discussed.*

First workshop – M13

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, and the type of collaboration with external stakeholders (if any) foreseen/taking place.*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Monitoring and evaluation plans – which monitoring indicators and evaluation activities did you select for each action? Are there any challenges you envision in terms of the monitoring and evaluation process?

Adjusting the course of the action on the basis of the discussion

Second workshop – M15

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Formative evaluation activities – How was the experience of conducting focus groups or other formative evaluation activities? What challenges were encountered, and what would you do differently in the second round of formative evaluation activities?

Adjusting the course of the action on the basis of the discussion

Third workshop – M18

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Lessons learnt from the formative evaluation – What do the findings form the formative evaluation say about the action? What can be done to improve and strengthen the action in the second part of the implementation period?

Adjusting the course of the action on the basis of the discussion

Fourth workshop – M21

Date	
Location	
Name, role and institution of workshop participants	
Actions implemented in your institution discussed	*Please specify: the actions' titles, the thematic areas they refer to, if they are new pilot actions or advancements of already existing actions, the type of co-design in Twin trios for each action (inspired by another partner's practice, same action implemented in different partners' contexts, individual action on which input from the Trios has been received)*

For each of the subheadings below, please include a brief outline of the topics covered, the actions discussed, and any considerations on possible changes to the actions' design, implementation, or monitoring and evaluation, to improve implementation and/or in light of any challenges or resistances faced. Under the last subheading, please provide an outline of any decisions or adjustments made as a result of the discussion, as well as a summary of the learning points that emerged in the discussion.

Evaluating the action's design by revisiting the logic model and template for the design of actions

Discussing the action's monitoring indicators

Evaluating resistances to implementation

Timeline-specific topic: Towards sustainability – As we reach the end of the implementation cycle, how do you envision the action progressing in the future? What measures can be taken to support the action's sustainability?

Adjusting the course of the action on the basis of the discussion

Formative evaluation report – Name of partner

Introduction

*This template is for recording findings from the **formative evaluation activities**. These activities will take place in two rounds: the first (M14/15, October/November 2024) will provide insights into the first half of the implementation process, while the second (M21, May 2025) will provide insights into the second half of the implementation process. In each round, at least **one evaluation activity per action should be carried out**. The activity could be a focus group, organised with key actors involved including beneficiaries/participants (which may be organised online), a questionnaire, or a set of interviews carried out with key actors. The choice of activity should depend on the action and on its characteristics.*

This template needs to be filled in and uploaded in SharePoint respecting the following deadlines:

- *M15 (November 2024): Reporting results of the first round of formative evaluation activities.*
- *M22 (June 2025): Reporting results of both rounds of formative evaluation activities.*

Please provide a brief paragraph explaining how the evaluation activities took place. Mention the main steps as well as indicating the activities conducted, for instance using the table below (please delete examples).

Action name	Formative evaluation activity/tool (round 1)	Formative evaluation activity/tool (round 2)
Workshop on unconscious cognitive biases in recruitment	Pre-test/post-test questionnaire completed by participants	
Pink boxes	Focus group	

Action 1

Overview of the action

Please fill in the following details about the action (delete examples).

Action name	Workshop on unconscious cognitive biases in recruitment
Action timeframe	June 2024 – May 2025
Thematic area	3. Gender equality in recruitment and career progression
Intersectional inequalities addressed by the action	Race/ethnicity, age, disability, religion/belief, nationality

Is the action concerned with data collection practices?	No
Is the action intersectoral?	No
If the action was developed intersectorally, which external stakeholders are involved in the action?	N/A
Was the action co-designed in/with the Twin trio?	Yes, it was an adaptation of a measure already tested by XXX partner or Yes, and we are implementing similar measures with YY partner(s)

Please provide a paragraph outlining the action, its objectives, the step-by-step process followed for the implementation of the action, and the main results achieved.

Formative evaluation activity (first round)

Please describe the formative evaluation activity carried out for this specific action. Please include (either here by copying and pasting, or as an Annex) the tools used for the formative evaluation activity (e.g., list of interview questions, focus group questions/agenda, questionnaire).

Activity conducted (Describe the activity, the tool used, and links to related Annex)	Targeted participants (aggregated numbers and M/F ratio)	Roles and positions of targeted participants	Staff members or GEP working group members responsible for the activity	Date in which the activity was conducted

Findings from the formative evaluation activity (first round)

What are the main decision-making bodies involved with the implementation of the action? Is there a commitment from top management?

How are responsibilities for the implementation of the action distributed?

Which external actors have been involved, and in what roles?

Have any institutional bodies or mechanisms been established to implement the action?

Have activities been carried out as foreseen? List the short- and medium-term outcome indicators for each activity, and whether they have been achieved (or to what extent/% have they been achieved, if the action is still ongoing?).

Outline any issues related to the project timeline. Is the timeline realistic, have there been any delays?

Does the implementation of the action align with its objectives?

Is the implementation of the action meeting its intersectional objectives? How? If not or partially, why?

Were there any deviations from the planned activities? (according to the design of the action and the Monitoring and evaluation plan, content-wise and timeframe related adjustments, if any)

What factors inhibit or promote the implementation of the action in line with its objectives?

To what extent has implementation changed over time? What has changed?

What knowledge and skills are required for the action's implementation? Are these skills present among the organisers? If not, what are the learning needs?

What barriers were encountered during implementation? Was it possible to overcome these barriers and how?

Is the implementation of the action encountering any resistances? Where are they coming from? Are they implicit or explicit, and how are they being handled?

What are the results and improvements of the action in terms of gender equality and inclusivity dimensions? Is the action contributing to institutional change?

Did the action have any unexpected/unplanned outcomes? If so, which?

Are there planned ways in which the impact of the action will be ensured after the end of the implementation? What will be done to guarantee the sustainability of the change?

Formative evaluation activity (second round)

Activity conducted (Describe the activity, the tool used, and links to related Annex)	Targeted participants (aggregated numbers and M/F ratio)	Roles and positions of targeted participants	Staff members or GEP working group members responsible for the activity	Date in which the activity was conducted

Findings from the formative evaluation activity (second round)

What are the main decision-making bodies involved with the implementation of the action? Is there a commitment from top management?

How are responsibilities for the implementation of the action distributed?

Which external actors have been involved, and in what roles?

Have any institutional bodies or mechanisms been established to implement the action?

Have activities been carried out as foreseen? List the short- and medium-term outcome indicators for each activity, and whether they have been achieved (or to what extent/% have they been achieved, if the action is still ongoing?).

Outline any issues related to the project timeline. Is the timeline realistic, have there been any delays?

Does the implementation of the action align with its objectives?

Is the implementation of the action meeting its intersectional objectives? How? If not or partially, why?

Were there any deviations from the planned activities? (according to the design of the action and the Monitoring and evaluation plan, content-wise and timeframe related adjustments, if any)

What factors inhibit or promote the implementation of the action in line with its objectives?

To what extent has implementation changed over time? What has changed?

What knowledge and skills are required for the action's implementation? Are these skills present among the organisers? If not, what are the learning needs?

What barriers were encountered during implementation? Was it possible to overcome these barriers and how?

Is the implementation of the action encountering any resistances? Where are they coming from? Are they implicit or explicit, and how are they being handled?

What are the results and improvements of the action in terms of gender equality and inclusivity dimensions? Is the action contributing to institutional change?

Did the action have any unexpected/unplanned outcomes? If so, which?

Are there planned ways in which the impact of the action will be ensured after the end of the implementation? What will be done to guarantee the sustainability of the change?

Which outputs, outcomes and impact (intended and unintended) in terms of gender equality were the result of the action?

Which intersectional and/or intersectoral outcomes and impact (intended and unintended) were the result of the action?

To what extent were the expected outcomes and impact of the action achieved?

Which facilitating and hindering contextual factors affected the outcomes and impact of the action?

Action 2

Please copy and paste the template from Action 1 for all other actions.

Action 3

 Action 4

Action 5

Summative evaluation report – Name of partner

Introduction

*This template is for recording findings from the **summative evaluation activities**. The summative evaluation (M22) will take place via 1 focus group per twin trio, and 2-3 online interviews per partner. Online interviews will be conducted with selected staff members, including middle and top management as well as a selection of external stakeholders engaged in collaborative actions. The interviews will be carried out by Smart Venice. The results of the summative evaluation will be reported in D3.3 (Pilot action results).*

This template will be filled in and uploaded by Smart Venice in SharePoint by the end of Friday 4th July 2025 (M23).

Please provide an overview of the summative evaluation activities conducted for this partner.

Formative evaluation activity	Number and roles of participants	Date
Twin trio focus group	GEP working groups of the 3 partners (7 members)	
Online interview	1 member of management	
Online interview	1 HR officer	
Online interview	2 external stakeholders involved in a collaborative action	

Focus group details

Date	
Location	Online
Name, role and institution of focus group participants	
Implemented actions discussed in the focus group	
Focus group agenda/guiding questions	

Interview details

Date	
Location	Online
Name, role and institution of interviewees	
Implemented actions discussed in the interview	
Interview questions	

Date	
Location	Online
Name, role and institution of interviewees	
Implemented actions discussed in the interview	
Interview questions	

Date	
Location	Online
Name, role and institution of interviewees	
Implemented actions discussed in the interview	
Interview questions	

Summative evaluation findings

Institutional commitment

What was the level of commitment from management to the actions developed as part of the NEXUS project?

What is the level of commitment from management to institutional change for alleviating gender inequalities and intersectional inequalities in the organisation? Has the level of commitment changed during/as a result of the NEXUS project?

To what extent were the needed/expected resources for NEXUS actions made available overall? If they were not made fully available, why?

Institutional change

What is the level of institutional change that has taken place as a result of the NEXUS project, the co-design process and collaboration with stakeholders?

How has the institution's GEP been affected by the NEXUS project, the co-design process and collaboration with stakeholders?

How do the new NEXUS actions and the GEP fit within existing DEI frameworks in the institution?

To what extent have the actions become embedded into institutional routine/regulations/processes?

To what extent is there an increased awareness of gender equality and intersectionality in the institution?

Overall, how sustainable are the actions developed as part of the NEXUS project?

How sustainable is the institutional change that has taken place as a result of the NEXUS project?

How has the NEXUS project affected data collection processes at the partner organisation?

Overall, how successful was the integration of an intersectional approach? Were there any repercussions of this approach at the institutional level? How sustainable is the change enacted in an intersectional direction?

Overall, how successful was the integration of an intersectoral approach? Were there any repercussions of this approach at the institutional level? How sustainable is the change enacted in an intersectoral direction?

What were the barriers faced in the institutional change process (e.g., resistances, due to cultural stereotypes; insufficient stakeholders' engagement, ineffectiveness of capacity-building and training efforts; and failed sustainability of project results.)

Co-creation process and intersectoral collaboration

How successful was the co-creation process? How did the co-creation process take place and develop in the Twin trio? What was its impact?

How successful was the development of partnerships with external stakeholders? What was the scope and nature of collaboration with external stakeholders?

What was the impact of the capacity building programme in achieving and sustaining institutional change towards inclusivity?