

The How, What and When of Project Monitoring Facilitating Successful Implementation of Gender Equality Plans in European Research Institutions

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Abstract This paper focuses on monitoring as a key component of successful structural change projects. Project monitoring is usually defined as an on-going collection of project data in order to assess whether a project is going in the right direction and follows the pace and stages set beforehand. This paper elaborates on the how, what and when of successful project monitoring and describes the strategies and approaches to monitoring that was used in the international, collaborative project GenderTime. In this project seven different tailor-made gender equality plans (GEPs) were implemented in seven research institutions in seven European countries. The seven GEPs contained a very diverse set of over 100 actions to improve gender equality and strengthen the position of women researchers in these institutions. GEPs are inherently complex, constructed to solve complicated, multi-dimensional and contextually dependent problems concerning gender inequality. The project data in GenderTime, that needed to be monitored, was thus characterized by being qualitative diverse and quantitatively extensive. This paper describes the monitoring strategy that was developed to fit this context and the monitoring tools that were designed and implemented. The overall aim of the paper is to share and disseminate the knowledge gained regarding monitoring during the four years of the project.

Keywords Gender Equality Plans. Context sensitive monitoring. Tools.

Summary 1 Introduction. – 2 Monitoring principles. – 3 Monitoring Toolbox. – 3.1 Cultural Staff Survey and National Survey Reports. – 3.2 Peer Consultation Reflection Session. – 3.3 Incremental Transformation Process Monitoring Tool. – 3.4 Most Significant Change Technique. – 4 Concluding discussion.

1 Introduction

Evaluation and monitoring are essential elements in programmes and projects that set out to produce some kind of change in behaviours, events, cultures or conditions in society, sectors or in organizations (Kusek, Rist 2004). The purpose of evaluation and monitoring activities is to find out if the programme is working as it is expected and planned (Pawson, Tilley 2004). Monitoring refers to the on-going collection of data to assess whether a change project is going in the right direction and complies with the pace and stages set in the project plan (Funnell, Rogers 2011). The purpose of adopting such an internal monitoring system in a change project is to gain a comprehensive understanding of the interventions, to learn from successes and challenges and to facilitate incremental corrections and improvements.

Monitoring contributes to systematizing change interventions and the implementation process. It can produce detailed and structured information about what is happening in the change project and how the interventions are going (Rossi et al. 2004). Monitoring identifies whether or not the desired results are achieved and can be used to develop corrective actions to optimize future achievements (Williams, Hummelbrunner 2010). It tracks progress and reports on achievements at different times in the project. This systematic knowledge can be further used to re-adjust objectives and goals and keep them realistic (cf. Kotter 1995). In addition, monitoring can systematize individual and shared reflection. It can thus be used to provide a framework to facilitate knowledge sharing between participants and stakeholders in a project (OECD 2002). These reflections can be used to improve the interventions and implementation of the change plans, but also to develop plans for how interventions can be adopted to other circumstances and transferred to other settings (Kusek, Rist 2004).

Although the benefits of monitoring seem obvious, it is often not given a prominent place in change projects and sometimes it is overlooked completely. The distinction between monitoring and evaluation is also often unclear. Defining monitoring and evaluation in relation to each other can prove challenging, particularly considering there are several different types of both monitoring and evaluation, some of which are overlapping (Equality Challenge Unit 2014). This seems to have resulted in that most projects put an emphasis on evaluation, and less so on monitoring, which could have as a consequence that certain crucial elements of evaluation/monitoring are understated.

The purpose of this paper is to fill a gap in the existing literature on project/program evaluation and monitoring, and draw special attention to the possibilities with monitoring. The aim is to present the strategy and the principles that guided monitoring in the GenderTime project and some of the most central monitoring tools developed and adopted in the project.

GenderTime,¹ a project funded by the European Commission between January 2013 and December 2016, aimed at increasing the participation and career advancement of women researchers in seven research performing institutions (RPOs), using tailor-made Gender Equality Plans (GEPs). Monitoring was a key component of the implementation of these GEPs. It involved frequent collection and analysis of information about the work performed in the project to be compared with previous set objectives and targets, and connected discussions about corrective actions (if necessary). This was done through regular face-to-face feedback during the project meetings and written reporting in between the meetings. Relevant procedures, tools and analytical indicators for monitoring were developed throughout the project: 1) to define tailor made indicators and to develop monitoring tools, and: 2) to monitor the outcome of the action plans in each GenderTime institution. A total of ten monitoring tools were designed and applied during the 48 months of project duration [tab. 1] (Peterson, Dahmen 2018).

Guiding the development of the monitoring tools were eight principles outlining the how, what and when of efficient project monitoring. These guiding principles were, however, initially only implicit in the monitoring work. They were elaborated in a more explicit manner parallel with the development of the monitoring tools themselves. The eight guiding principles for monitoring are the result of, and emerged from, the monitoring work during the four years in the GenderTime project. They comprise the lessons learned during the project. As such, they include references to previous research and build on theoretical starting points, but also draw on the empirical data collected and the experiences from developing and implementing the specific monitoring tools in the project. The eight monitoring principles summarize assumptions regarding the character of monitoring tools, the timing of implementing monitoring tools and other key features of a successful monitoring strategy. Below, these principles are described and explained.

1 GenderTime received funding in the 7th Framework Programme of the European Commission. Consortium members: Egalité des Chances dans les Etudes et la Profession d'Ingénieur en Europe, France (coordination); Interdisziplinäres Forschungszentrum für Technik, Arbeit und Kultur, Austria, Università degli Studi di Padova, Italy; Gothenburg University, Sweden; Université Paris Est Créteil, France; Mihailo Pupin Institute, Serbia; Bergische Universität Wuppertal, Germany; Loughborough University, UK; Fundacion TECNALIA Research & Innovation, Spain; Donau-Universität Krems, Austria.

2 Monitoring Principles

1 Make monitoring an integrated part of the project
This is a comprehensive recommendation that has several implications for the overall planning of monitoring. To integrate monitoring in the project means that it is considered a core part of the project and a continuous process throughout the different phases of the project. The implication of this is that monitoring activities should be planned parallel with other project activities.

2 Combine a deductive approach with an inductive one
This recommendation concerns the overall strategy for the process of developing the monitoring strategy. Combining a deductive approach with an inductive means to draw on research-based literature about organizational change but to also let the monitoring process be flexible and guided by empirical observations of the change process being monitored.

3 Combine qualitative and quantitative tools
This recommendation concerns how to design the monitoring tools. A diverse and unique set of monitoring tools should be adopted, with a wide range of methods and performance indicators; questionnaires, checklists, interview guides and workshop concepts for team discussions. Decisions about when to implement which tools should be based on considerations of the project phase. While the launching phase of a project may benefit from quantitative tools, the reflection phase may require qualitative tools.

4 Tailor-make monitoring tools
This recommendation concerns the character of the monitoring tools. Tailor-making monitoring tools means to design them while taking into account the specific, local, context that they will be implemented in and allow for them to be adapted to this context. This tailor-making aspect cannot be achieved without monitoring being an integrated part of the project or without it being a collaborative effort.

5 Collect diverse and varied data
This recommendation concerns the data collected. Monitoring tools should collect data and information with a focus on diversity, variety and inclusion. The implication of this is that monitoring tools should include the direct involvement of both project members and so-called target groups or beneficiaries of project activities.

6 Make monitoring a collaborative effort

This recommendation concerns the question about participation and who should be involved in monitoring activities. Making monitoring a collaborative effort means involving all project members. This involvement concerns not only the collection of information but also the assessments and analyses of the data gathered. Feeding back the results from the monitoring activities to the project members creates a dialogue about future improvements of the project- also of monitoring. This dialogue is essential for adopting an inductive approach.

7 Adapt to the project phases

This recommendation concerns the timing of monitoring. The intensity and frequency of monitoring should take into consideration the specific project phase. The implementation phase e.g. might call for more intense monitoring than the launching phase. The monitoring tools should also have different design depending on the phase. During the final phase, they should e.g. allow for reflections of the complete implementation process (and thus might overlap with certain evaluation activities).

8 Allocate sufficient resources to monitoring activities

The final recommendation concerns the budget and person months dedicated to monitoring activities. Monitoring should not be regarded as a side-product to the actual implementation work. Rather it is an important accompanying measure, which helps to understand underlying processes for enhancing the effectiveness of the practical work. Therefore, sufficient time and financial resources are necessary for both the persons undertaking the monitoring and for the monitored actors.

3 Monitoring Toolbox

The construction of each of the ten monitoring tools followed a systematic and innovative approach that built upon a thorough meta-analysis and bibliographical review of previous research. This was combined with a carefully constructed theoretical framework. In order to even further solidify the soundness of the monitoring approach, international gender equality experts were interviewed about their experiences and advice additionally.

Table 1 below displays the monitoring tools developed and implemented within the project. The table illustrates the different approaches, concepts and contents of the tools and in which phase of the project the tools were implemented.

Table 1 Overview Monitoring Tools in the GenderTime (GT) project

Monitoring tool	Approach	Performance indicators	Phase	Target group	Content	Significant results
Cultural Staff Survey	Quantitative	Survey questionnaire	Launching phase	Staff	Baseline	Status quo/ Benchmark
National Report	Quantitative	Report template	Launching phase	Staff	Baseline	National/ Institutional differences
Exchange Workshop	Qualitative	Workshop	Implementation phase	GT members	Implementation process	Success cases and challenges
Operational Process Monitoring Tool	Qualitative	Report template	Implementation phase	GT members	Implementation progress (objectives)	Identifying supporting/ challenging factors
Self-Assessment of Change Agent Role	Qualitative	Questionnaire	Implementation phase	GT members	Change drivers	Resources for Change Agents
Interim Feedback Report	Quantitative/ Qualitative	Excel sheet	Implementation phase	GT members	Implementation progress (actions)	Success factors and hindering factors
Peer Consultation Reflection Session	Qualitative	Workshop	Implementation phase	GT members	Implementation process	Overcoming challenges/ using support factors
Incremental Transformation Process Monitoring Tool	Qualitative/ Quantitative	Workshop	Reflection phase	GT members	Indicators, goals and impact	Step by step achievements
Most Significant Change Technique	Qualitative	Interview guidelines/ workshop	Reflection phase	GT members, staff	Indicators and impact	Significant individual/ organizational changes
Final Feedback Report	Qualitative/ Quantitative	Report template	Reflection phase	GT members	Impact	Overall evaluation of process and impact

Four of these monitoring tools are described more in detail below. The selection of these tools was made because they are characteristic for the systematic and innovative monitoring approach in the GenderTime project (Dahmen, Peterson 2017).

3.1 Cultural Staff Survey and National Survey Reports

The Cultural Staff Survey was the first monitoring tool applied in the project. The aim of this monitoring tool was to provide the seven national project teams with a quantitative indicator they could use to measure the level of gender equality at the participating institutions at the start of the project, i.e. to establish a baseline for the implementation of the GEPs.

The Cultural Staff Survey was based on a Culture Analysis Tool² developed by UKRC-WISE, as part of the HEFCE funded national HE STEM programme with the aim of sharing good practice in gender equality in higher education. The aim of this questionnaire is to help university departments understand how male and female staff experience their working environment and what, if any, improvements may be needed to ensure equality of opportunity. It focuses on four areas:

1. Participation and promotion practices
2. Workplace culture
3. Leadership and management commitment
4. Institutional reputation and social responsibility

Six months into the project the national teams were involved in tailor making the survey to fit their specific national and cultural context but also to fit the intended target groups of the survey (research staff and/or administrative staff). The questions were adapted to meet the specific context of each institution also with regard to already existing gender equality activities of the organization. The surveys were translated into national languages and applied as online survey, which allowed a better dissemination of the questionnaire within the institutions/organizations (Barnard et al. 2014).

The implementation and analysis of this survey symbolized a benchmarking for the national teams about the work culture in their institutions. It is a useful tool for getting information on staff member's perceptions of working conditions, management structures, communication flows and organisational environment not only with respect to gender equality matters. For achieving gender equal workplace conditions, it is important to focus on the prevalent organisational structure itself (Castaño et al. 2010). The results further showed that the implementation of gender equality measures or GEPs can be even more difficult if actors in an organisation are not well informed about the legal, national and organisational context (Achterberg, Dahmen 2017).

A tool like the Cultural Staff Survey offers the possibility for an ongoing reflection of the implementation process on a structural and in-

² See: <https://www.wisecampaign.org.uk/resources/2010/06/staff-culture-analysis-survey> for more information (2018-02-22).

dividual level, which is important since organisational culture is not a static concept, it is fluent, and therefore it is necessary to explore the beliefs and behaviours within institutions. For these reasons, it can be recommended to implement staff surveys periodically or at least at the beginning and the end of an intervention for comparing the effects and results.

Due to the complexity of the GenderTime project, regarding the different national contexts, the Cultural Staff Survey was complemented with another monitoring tool; the National Survey Report. The aim of *the National Survey Report* was to support and facilitate a cross-national analysis of the results of the Cultural Staff Survey. The tool provided the possibility to compare the survey outcomes cross-nationally taking in consideration the interpretation of each team on their respective results. Results offered indications for the further implementation as well as monitoring process.

This tool filled an important function in order to develop a shared understanding of the national, organisational, cultural and social context in which each of the seven GEPs were implemented. Without this context, it would not only be difficult to interpret the results of the survey, but it would be difficult to monitor the implementation of the GEPs. This context was also essential for the dialogue-based knowledge exchange between the national teams, which was a central feature of the GenderTime project. Without it misunderstandings and miscommunication could easily create problems.

All partners were asked to give more context information on some selected survey questions, which are difficult to interpret for external persons without having organizational background knowledge. Additionally, also general information about the implementation background of the survey at their institution, e.g. if they had received any feedback from staff members etc. should be provided.

The National Survey Report was designed as a Word-template and consisted of two parts. Each part included questions and text boxes where the requested data could be inserted by the national teams. The first part of the National Survey Report focussed general information about the Cultural Staff Survey. In the second part of the National Survey Report the national teams were asked to add their own interpretation of the data and the results of the Cultural Staff Survey regarding some specific questions.

3.2 Peer Consultation Reflection Session

The Peer Consultation Reflection Session was also a monitoring tool based on the monitoring principle about reflection as an important monitoring methodology (Coleman, Ripplin 2000). The aim of the monitoring tool was to create an arena where participants in the Gender-

Time project could listen, reflect, share ideas and solve problems together and learn from each other's experiences of the implementation progress across the national teams. The tool was inspired by previous literature on peer consultation reflection exercises (Brown et al. 1999). Peer consultation reflection exercise is an innovative strategy for personal and professional development that can be used in many different settings, to create a valuable opportunity to interact and learn from colleagues. It is a method that encourages and helps people to see their situation from a different perspective and to understand problems in a different way.

The Peer Consultation Reflection Session monitoring tool was a workshop concept where the participants were divided into four different peer reflection groups to discuss four different themes. After 30 minutes discussion in these four groups, four new groups were formed, discussing four new themes. Besides the discussion themes the participants were also provided with instructions for how to discuss them. Participants were expected to switch between taking on the role as a presenter, i.e. a person that describes and reflects over a situation, action, challenge or good practice, and the role as reflection facilitators. Reflection facilitators were expected to pose questions to the presenter to further clarify the challenges or to further increase the understanding of the success factors. The participants in the groups form a peer reflection team that facilitates the reflections of the presenter and contributes with their reflections on how to for example overcome challenges or how to best take advantage of success factors.

In order to facilitate reflections to be shared in a helpful manner and to stimulate sharing of good advice and solutions to challenges the discussion themes were constructed as so-called "how to"-themes. The first round of reflection sessions was organized around the following four themes:

- How to assess equality in complex organisations?
- How to understand the gendered career through interviews and focus groups?
- How to raise awareness within the organization?
- How to support women through mentoring?

The second round of reflection session was organized around the following four themes:

- How to monitor through gender sensitive indicators?
- How to identify career obstacles through exit interviews?
- How to disseminate good practices outside the organization?
- How to challenge male dominance through women's networks?

The participants in the workshop were divided into the Peer Consultation Reflection Sessions groups based on information reported by the GenderTime partners in the Interim Feedback Report but also in two previous monitoring tools: *the Operational Process Monitoring*

Tool and the Self-Assessment of Change Agent Role (information on these two tools is available in our published Monitoring Handbook [Peterson, Dahmen 2018]). The groups were thus constructed based on whether the participants could construct helpful advice based on previous experiences within this field of subject - or whether they had requested or could use such advice in the near future.

After 60 minutes everybody had participated in two Peer Consultation Reflection Sessions and a short “check-out” phase commenced, where one rapporteur in each of the eight teams reported back their main reflection results and the key insights that had surfaced during the reflection sessions. This “check-out” round revealed that the workshop concept had been successful in providing an arena for sharing and reflection over a wide range of relevant and important themes. During the sessions there had also been a note taker in each eight teams and the notes were handed in to the workshop leaders on so called “reflection sheets”.

3.3 Incremental Transformation Process Monitoring Tool

The *Incremental Transformation Process Monitoring Tool* is another workshop exercise concept that was implemented during one of the GenderTime project meetings. The workshop focused on setting and achieving intermediate goals and defining gender equality impact relatively and contextually in relation to the starting point in each participating institution. The workshop concept was developed with a theoretical base in Kotter’s (1995, 1996) theories about organizational change.

For the workshop, one step from each of Kotter’s three phases - form, generate and sustain - was picked out for three different groups to work on. The reason those three steps were chosen was that the previous monitoring tools had not targeted them although they were considered as essential to discuss and pay attention to. The first of the three steps that was selected for the monitoring workshop concerned forming a strategic vision and initiatives and the group that was assigned to work with this was given the following questions to discuss: What were your visions when GenderTime started? How do we know that we are getting closer to the visions? How have visions shaped strategies used? Have the visions changed over time? How have you communicated the vision? What can be learnt about visions from GenderTime?

The second of the three steps involved how to generate short term wins and the group that was assigned to discuss this step was given the following questions: What intermediate goals have you achieved? What measures provide evidence of these successes? What methods can be used to communicate the goals to motivate and increase credibility to gender equality change processes? What can be learnt about

short-term wins from GenderTime? The final and last of the three steps - how to sustain acceleration - was given to the last group to discuss with the following questions: How can you build on already achieved goals to continue to drive change? Can you keep looking for improvements or bring in new change agents? Can successes in GenderTime be built on to develop new actions for the future?

Each group was provided with a template where the questions were posed in a figure that illustrated the connections between them and the implementation process. The outcomes of the small group discussions were later reported on and discussed within the whole project consortium. The feedback from participants about this tool was very positive.

3.4 Most Significant Change Technique

While evaluation and monitoring tools usually adopt a deductive, theory-led, approach and use pre-defined indicators of change, the *Most Significant Change* (MSC) technique explores definitions of change among stakeholders, beneficiaries and field-level workers (Benning et al. 2012). It is based on stories told by participants and therefore gathers rich and “thick” descriptions that make intangible changes visible that would remain hidden if only more traditional, or conventional, quantitative evaluation and monitoring methods were used (Davies, Dart 2005). The MSC technique is a monitoring method that is dynamic and adaptive and particularly appropriate in complex programmes where the impact is difficult to quantify and involve social and culture change (Willets, Crawford 2007).

The aim of the adapted tool was to collect MSC stories from two groups of participants: 1) stakeholders and beneficiaries of GenderTime who participated in change activities, and, 2) the change agents working within the project. Previous literature on the MSC technique was consulted (e.g. Davies, Dart 2005) about how to formulate appropriate questions for a questionnaire/interview guide aiming to collect MSC stories. As a result, a questionnaire/interview guide, which included two complex questions was developed [tab. 2].

Table 1 The two questions included in the questionnaire/interview guide in the Most Significant Change Monitoring Tool in GenderTime

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- 1) Describe the project related activity/measure that you took part in. Reflect over the most significant change that you personally experienced in relation to participating in the activity.
It can be a direct change (you learnt something) or an indirect change (you made a change due to the information that you learnt).
Please explain why this change is important to you.
Examples: change in career possibilities and opportunities; change in awareness about gender and gender equality; changes in networks and contacts
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- 2) In your opinion, what has been the most significant change that has occurred in your institution as a result of the project?
Please describe why this change is/was important to you.
Examples: change in attitudes, climate and culture; change in administrative routines; change in leadership and management; change in the physical environment etc.
-

Source: Adaptation of the MSC Technique, cf. Benning et al. 2012; Dart, Davies 2003; Davies, Dart 2005; Lennie 2011; UNDP 2009; Willetts, Crawford 2007

The questions were framed as open questions while at the same time encouraging the participants to be selective in their reporting. The MSC monitoring tool thus only used two predefined so called domains of change in the questionnaire: 1) individual and personal changes (“that you personally experienced”), and 2) organizational and collective changes (“in your institution”) (as displayed in table 2). These two domains of change were also developed in previous research on organizational gender change (Benschop, Verloo 2012).

The MSC monitoring tool was used in three different ways: 1) as guidelines for face-to-face interviews with beneficiaries; 2) as questionnaire template for email interviews within the same group; and 3) as an interactive workshop concept, implemented during the last project meeting, with the change agents of the project core team as target group.³

3 A detailed description of the development and application of the Most Significant Change Technique as monitoring tool is available in: Dahmen-Adkins, J. & Peterson, H. Most significant Change: Closing the Gender Gap in Research. Proceedings of the 2nd International Conference on Gender Research, p. 151-158, (2019), https://www.researchgate.net/publication/332180557_Most_Significant_Change_Closing_the_Gender_Gap_in_Research (2019-07-14).

4 Concluding Discussion

This paper has presented in detail only a selection of the monitoring tools developed in GenderTime. It must also be noted that not all of the monitoring tools have yet been tested beyond the GenderTime project.⁴ A remaining challenge is therefore to evaluate the monitoring tools and assess the possibilities to adapt and transfer them to other contexts. Most of the monitoring tools were however, appreciated and they were always developed while taking into account suggestions and requests from the GenderTime project consortium. In this way, the deductive approach to monitoring was combined with an inductive approach (Dahmen, Peterson 2017).

The primary aim of the paper was to introduce the systematic and innovative approach to monitoring that guided the development of the monitoring tools and the strategy used. These principles outline the most essential elements in the monitoring approach adopted. The main conclusion that can be drawn from our work, could be added as final principle: *Monitoring is necessary in order to reach sustainability of implementation processes.*

We hope that sharing our experiences of monitoring can inspire others and contribute to that monitoring becomes established as an essential part of the implementation of GEPs but also in other structural change processes. Our literature review identified a gap regarding documentation of monitoring activities that this paper addresses. More research is however needed concerning the relationship between evaluation and monitoring as these activities are sometimes, and perhaps inevitably, overlapping.

Besides being invaluable for the implementation process the monitoring tools also provided the project with empirical qualitative and quantitative data that can be further analysed and shared with the research community to provide new knowledge on gender equality change processes and success factors and hindering factors. We hope that this paper has contributed to this.

⁴ Some of the tools are currently adapted within the Horizon 2020 project CHANGE, a so-called sister project of GenderTime with similar objectives and aims (www.change-horizon2020.eu).

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