

Working towards gender equality in small and medium TSOs: An incremental approach

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Margaret Harris and Helena Miller

Abstract

This paper describes and discusses a gender equality project conducted with Jewish third sector organisations (TSOs). An adapted version of 'Project Juno' was used to support six small or medium sized TSOs in working towards gender equality. Key learning points for the wider TSO sector are drawn out.

Key words: gender equality; organisational change; Jewish voluntary organisations; awards

Introduction

As in many other countries, legislation has been enacted in the UK – going back more than fifty years - with the intention of stamping out discrimination on the grounds of gender, sexuality, race, national origin and/or religion. The UK's 2010 Equality Act consolidated previous anti-discrimination Acts and included not only gender but also discrimination on the grounds of disability, religion, pregnancy, age, sexual orientation, ethnicity and nationality.

Yet academic and media reports suggest that equality laws are being flouted and that, at least in the case of women, they are still denied full equality in the workplace. They suffer discrimination in recruitment and promotion. They are subject to harassment. The gender pay gap persists and many places of work discriminate against those with care responsibilities. Discrimination plays out in obvious disparities in the proportions of women and men in senior leadership and management positions. This failure to ensure equality in the workplace applies not only to the private and public sectors but also to the third sector. Research in England into the impact on charities of the 2010 Equality Act (Morris et al, 2013) found that many charities were not considering their responsibility to ensure equal treatment and opportunities for beneficiaries, volunteers, staff and trustees.

The barriers to achieving gender equality in the workplace have been identified variously by academics as being structural, institutional, cultural and psychological (Inglehart and Norris, 2003). Suggested policy responses have included changes to human relations practices, such as affirmative action, diversity management, facilitated women's networking, and family friendly policies (Daniels and Parkes, 2008). Most recently, 'behavioural design' or 'nudge' approaches grounded in social psychological insights have been suggested as a means to encourage change (Halpern, 2015).

Little attention has been paid to the experience of women specifically in the third sector context (Themudo, 2009). Teasdale and colleagues (2001) explored gender differences in leadership, participation and employment in the 'third sector' and 'social enterprises' in the UK. They found that women are under-represented as leaders of private sector social enterprises but more equally represented as leaders of third sector ones; in the latter men take up around half of the higher status positions. In their study of UK social enterprises, Lyon and Humbert (2012) found that women are underrepresented on boards and that this is most pronounced in smaller organisations. With respect to remuneration, Teasdale et al (2011) found that the gender pay gap in the UK is narrower in the third sector than in other sectors and that it is lowest for those in the highest managerial positions.

Despite growing scholarly interest in the topic of gender and the third sector, questions remain about how third sector organisations (TSOs) might move towards *implementing* gender equality and overcoming barriers to change. Whereas leaders of large TSOs may draw on generic management

knowledge and gender equality guidelines, there has until now been little evidence-based practical guidance geared to smaller or less formal TSOs. This paper, then, is about the practical quest to achieve gender equality in a third sector context. We describe and discuss an action research project which explored how small and medium sized third sector organisations (TSOs) might move towards achieving gender equality.

The 'Gender Equality Project'

The action research described here followed from an earlier volunteer-led initiative, the 'Commission on Women in Jewish Leadership'. The resulting report (Jewish Leadership Council (JLC), 2012) was critical of the restrictions facing women working in UK Jewish TSOs. The report proposed an incremental approach to promoting gender equality in Jewish TSOs and reflected ideas about 'nudging' as a route to organisational behavioural change (Bohnet, 2016; Halpern, 2015). A key recommendation was to establish an award for those organisations which could be seen to engage positively with gender equality challenges and "*which acknowledges agreed change rather than absolutes*" (JLC 2012:22).

The report's authors initially discussed implementation with a consultative group of Jewish women who had professional, research and volunteer experience of the Jewish and broader third sectors. Six of that group (including the authors of this paper (1)) volunteered to form a panel to promote gender equality and to explore possible approaches to encouraging movement towards gender equality in the smaller organisations of the Jewish voluntary sector. The women-only Panel was diverse as to Jewish religious observance, age and professional experience and included those from across the various sections of the mainstream Jewish community.

The Gender Equality Plan

The Panel considered several existing gender equality implementation models in detail (eg Athena Swan, undated; McKinsey, 2007) and decided eventually to develop a bespoke Gender Equality Plan (GEP) which would be sensitive to characteristics of the Jewish voluntary sector but also explicit about the need for Jewish TSOs to respect gender equality values espoused by the wider UK third sector.

GEP was modelled primarily on a scheme already used and tested in British higher education settings – Project Juno (2) - which aims to increase the number of women involved in physics and physics education. The Panel selected Project Juno as their model because they saw the position of women in physics studies as analogous to that of women in the Jewish community, including the way in which women's participation tends to diminishes with age and seniority and the dominance of a male-focused culture which many women find intimidating in spite of their own learning and expertise. Following the example of Project Juno's 'Values Framework', the GEP was framed by five key principles: about organisational structure; staff and volunteer selection; personal development and promotion; organisational culture; and flexibility in working conditions (Appendix One). As with Project Juno, the Panel's intention was that progress towards gender equality in TSOs would be gauged by small groups of Panellists who would also support a change process through visits and discussions.

In view of the minimal funding available to support the Panel, and their own status as volunteers, Panellists decided to conduct a pilot with six TSOS in the first place and to do so using an action research methodology (Cairns et al, 2007: Reason and Bradbury, 2001) in which panellists (with some administrative support to record the process) would work collaboratively with TSOs over a defined period to identify ways of moving towards gender equality within their respective organisations. This methodology would be in keeping with the incremental approach to change

recommended by the 2012 JLC Report and would also maximise learning opportunities not only for Jewish TSOs but also for others interested in tackling gender equality issues in smaller TSOs.

In preparation for their work, Panellists received training from a professional equalities trainer on workplace gender equality issues such as relevant legislation; unconscious bias; language; and coaching approaches.

The GEP Pilot Process

The Panel's original intention was to mirror Project Juno by working with organisations to help them achieve different levels of an award – following the recommendations of the JLC Report (2012). Yet initial conversations with potential pilot organisations suggested that this was seen as both complicated and threatening; perhaps a reflection of the known preference of smaller TSOs to collaborate rather than compete with each other (Harris, 2010). The Panellists therefore sought less structured and competitive approaches to encouraging moves to gender equality. Following Project Juno, they suggested a process of self-evaluation followed by a process of setting change goals and monitoring progress. Potential pilot TSOs found this both attractive and acceptable as a non-competitive and helpful approach to moving towards gender equality.

Participation in the GEP pilot was then invited through Jewish community infrastructure organisations. Brief anonymised descriptions of the six pilot organisations are given in Appendix Two, illustrating their distinctive characteristics, as well as their similarities. Large formal UK Jewish TSOS were not included; all six organisations selected from the original ten who volunteered to participate, were medium or small sized by the standards of the British voluntary sector (Crees et al, 2016). As the selected organisations all responded to a general invitation to participate in the gender equality project, we assumed that we would be working with organisations which in principle were keen to improve their working practices in relation to gender equality.

The Panel aimed for a six month process with each organisation; sufficiently long to gauge the value of the GEP approach but sufficiently brief to limit the time demands on organisations, whilst also enabling them to achieve some change goals. Before the initial meetings with Panellists, each TSO identified a lead senior staff member (usually their Director or CEO) and a senior board member to be involved in the project. Each organisation also completed a profile questionnaire giving details about the organisation as well as the gender profile of staff and board members (Appendix Two).

Initial meetings were attended by two Panellists, and the project's administrator, alongside two or three representatives of the TSO. A checklist derived from the GEP five principles (Appendix One) was used to guide conversations, with Panellists emphasising that this was a two-way collaborative process through which it was hoped everybody would learn about ways of approaching gender equality issues. An action plan was agreed for each organisation, identifying six-month goals.

In each of the six organisations, an interim meeting took place after approximately three months, at which Panellists and TSO representatives reviewed action since the initial meeting, and re-evaluated, changed or added to the initial action plan. A final meeting took place with each organisation after six months to celebrate and reflect on the past half-year's achievements, and to set longer term goals for the TSOs themselves to work on.

The project administrator provided all participants with a summary document of the process at the end of six months. Some pilot organisations requested a meeting six months after the 'final' meeting to share further experiences and motivate them to maintain momentum on gender equality work. If requested, Panellists put organisations in touch with specialists and training resources.

At the final meetings, all participants reflected on their experiences of participating in the GEP project and shared their perceptions of both negative and positive aspects. In addition, Panellists

met to reflect on the GEP process from their own perspectives. In the following sections we draw together findings from these reflections as a means to sharing learning experiences and the challenges of working towards gender equality in smaller TSOs.

TSOs' Gender Priorities

All six of the TSOs saw gender issues around their boards as a top priority for change. Five of the six were concerned about the lack of women on their boards and related issues of board recruitment and succession. Organisations with a preponderance of women staff and volunteers found themselves with male-dominated boards. It was thought that tackling gender imbalances at board level required a long term strategy and could not be achieved within the time period of the GEP, so the GEP process supported organisations to develop strategies for longer term change; for example having search committees rather than relying on board members to recruit their friends, or seeking to recruit people with specific skills or characteristics; or appointing a board member to be a champion on gender issues.

The second most frequently identified priority for action (four organisations) was around gender awareness and diversity awareness more broadly. Some organisations started what was planned as a series of awareness- raising sessions for staff and board members during the GEP period. Other priorities identified by one or more project participants included pay differentials, male dominance of senior management positions, and volunteer recruitment and appraisal. One organisation initiated monitoring of staff pay and hours as part of the GEP process and another began monitoring gender profiles of volunteers. Another adjusted its recruitment procedures so that it was clear that flexible working was welcomed.

In some cases issues had been identified independently of, and well before, the start of the GEP process. In fact, interest in participating in the GEP mostly reflected a wish to get external support for tackling the issues, and external endorsement for adopting 'good practice'.

Participants' Reflections on the GEP Process

TSOs' views:

At the final meeting with Panellists, TSO participants reflected on their experiences of the GEP process over the six month period. All thought that the main benefit had been in increasing motivation to make change happen, often change that they had been aware was needed prior to the start of the process but for which they appreciated external support. Some TSO participants thought that change would either not have happened without the GEP process or that change had been accelerated because of it.

It was seen as helpful that the support provided through the GEP process was non-judgemental and guided by organisations' own assessments of priorities in moving towards change. Other aspects of the process seen as helpful included low or minimal cost; regular meetings and monitoring; a safe space to discuss broad organisational challenges; incremental approaches to change; promises from panellists to maintain contact after the formal six month period; and networking with other TSOs participating in the GEP.

From the start, Panellists had sought confirmation that boards were fully supportive of engagement with the GEP process. They had also suggested to organisations that each appoint a 'change champion' with responsibility for keeping an overview on gender equality issues beyond the GEP process. Both of these suggestions were eventually implemented by all six organizations although there was some initial scepticism.

All TSO participants cited examples of how they felt they had made progress by the end of the GEP period. Examples varied between organisations and according to their starting points but they included: gender issues becoming important for staff and boards; changes in procedures; and new initiatives sparked by the GEP process. Organisations had not only become more aware of gender equality issues but also more confident that they could tackle them. In the words of one CEO: *“The whole process has brought about a greater awareness of gender issues and associated good practice, particularly amongst Board Members”*.

Panellists’ views:

All Panellists had long experience of the mainstream Jewish communal sector and the wider voluntary sector as volunteers, board members and/or paid staff and yet they all felt that they themselves had gained from their GEP participation. They saw themselves as having been collaborators in a learning process. A key learning point was about the way gender equality issues were seen by participating TSOs. Whereas the panellists saw their role as being focused on gender equality, it became apparent that, for participant organisations, gender equality was often part of a broader focus on equalities and diversity and on good voluntary sector practice, for example in recruitment to boards.

All six of the organisations were small or medium-sized and internal responsibility for ‘human resource’ matters was dispersed rather than focused on a single person or role. This raised challenges about who had the authority within organisations to drive gender equality but also gave opportunities to draw a range of staff and board members into consideration of gender equality issues.

Finally, Panellists noted a high demand from participants for signposting to further sources of organisational support, learning resources and training opportunities – both during and after their participation in GEP. Again, this seemed to be a point linked to the smaller size of the participant organisations; they felt they needed external support and training in order to move towards change in organisational practice. By volunteering to participate in the project, they demonstrated their willingness in principle to change their practices and yet, the project suggested, moving beyond that willingness can require substantial input of resources and expertise which are lacking in smaller organisations (Harris and Aiken, 2017). Such TSOs need external support to facilitate change.

Emergent Learning Points from the Project

Organisational Context: For TSOs, gender equality may be just one element in a broader organizational context to do with implementing diversity and good practice. The drive to ‘good practice’ in diversity may be a powerful motivator to moving towards gender equality. Conversely, successfully tackling gender equality issues may encourage TSOs to tackle wider issues around diversity and equalities.

‘Values Framework’: Although this was not specifically mentioned in participants’ reflections, the framework (a bespoke version of the Project Juno values framework, see Appendix One) was offered to and accepted by all organisations as a basis for their thinking about gender equality and change. Having a starting framework of principles or values can mean that TSOs do not need to think from scratch about how to engage with gender equality and can move forward rapidly in setting priorities for change. Such a framework can also enable a systematic look at extant situations in an organisation (as part of a self-evaluation process) or enable it to decide to focus on just one or two areas as priority.

Awards: The project process suggested that an ‘award for change’ is not necessarily appropriate for smaller TSOs which are making a first foray into tackling gender equality issues. An award process

may be seen as burdensome and over-competitive and external actors who are in an assessment role may be seen as threatening. (This reflects recent literature which also notes the limitations of external award systems in the Higher Education context, for example Previtali, 2015; Shah and Nair, 2013). However, a 'softer' incremental approach which offers a 'values framework', facilitated self-evaluation, goal-setting and monitoring may be seen as less threatening, less resource-intensive and more in keeping with the organisational culture of smaller TSOs.

Collaboration: The project was presented to participating TSOs as one of collaboration between panellists and organisations, with panellists acting as supportive, non-judgemental friends. Outside intervention of this kind was valued but organisations were wary of any approach that might be directive. However they wanted more than simply friendly 'hand holding'. They were keen to have outsiders who could bring in new perspectives and connect them to networks, training and learning resources. They also appreciated outsiders who could share experience of gender equality issues in other TSOs.

Incremental Change: It can be helpful for progress on gender equality to be framed as an incremental change process rather than as a time limited project or a drive to conform with externally-set standards. This enables TSOs to embed ideas about gender equality into ongoing aspects of their organisation's work and progress even when they do not have dedicated resources for working towards gender equality goals. At the same time as an incremental approach was welcome, it seemed that having a timetable of just a few months in which to prioritise gender equality goals and move towards achieving them, gave an incentive to move forward.

Sustainability of change: Although a time-limited project on gender equality can yield observable changes, attention needs to be paid during such projects to sustainability of change as well as to continuing the change process after the end of the initial project. Means adopted to achieve this in the GEP included instituting regular internal monitoring around gender; regular data gathering; formalising informal practices; identifying 'change champions'; networking with other TSOs working on gender equality; development of long-term change goals and strategies; awareness training; and maintaining contact with external advisers.

Resistance to change: The GEP conducted with the six pilot organisations was completed with very little evidence of resistance to the process. This seemed to be attributable to three factors which should be borne in mind by others trying to conduct a similar project. First, the Panellists were working with volunteer TSOs which were positively interested in joining the project and supporting its goals; there was no element of coercion or judgement. Second the GEP process was devised after consultation with potential participants so that Panellists were able to avoid aspects seen as especially threatening or unhelpful by TSOs (including any hint of inter-TSO competition). And finally, TSOs decided for themselves in consultation with Panellists, which aspects of gender equality change they felt able to work on during the project period eg board composition, pay differentials or volunteer recruitment. In short, Panellists were able to work collaboratively with TSOs and support them in what they themselves felt were their priorities for change.

In Conclusion

The GEP project provided important lessons not only for the Jewish voluntary sector but also for other smaller TSOs. The challenges of working towards gender equality that emerged from the GEP pilot project are unlikely to differ substantially from those facing others in the UK since the mainstream Jewish voluntary sector is not substantially different or distinctive in its organisational characteristics - except perhaps with respect to philanthropic funding patterns (Halfpenny and Reid, 2000; Kahn-Harris and Gidley, 2010).

Thus we hope that this description and analysis of the GEP may be helpful for all small and medium TSOs which become aware of the gap between their current practice and the high aspirations of UK equality legislation (Morris et al, 2013). We would point particularly to what the GEP process has suggested about the limitations of award systems for encouraging change; about the benefits of individualised facilitation for smaller TSOs working towards gender equality; and about the need for TSOs to consider gender equality not only in relation to staffing but also in relation to volunteers and board members. We also noted that working towards gender equality may be framed in TSOs as part of a broader aspiration to increase diversity and to follow accepted good practice.

Endnotes

- (1) The authors of this paper acknowledge the major contributions to the Panel's work made by their Co-Panellists, the project's administrative staff, the Institute of Physics and the six pilot organisations.
- (2) Project Juno, was set up by The Institute of Physics (see <http://www.iop.org/policy/diversity/initiatives/juno/index.html>) . From 2002, voluntary panels have been visiting university physics departments, to investigate and discuss gender issues as part of a drive to get more women in physics and to stop women from dropping out at stages of their education and careers.

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Appendix One

The GEP Five Principles (adapted from Project Juno and reflecting its 'Values Framework')

Principle One:

A robust organisational framework to deliver equality of opportunity on gender

- 1.1 Establish organisational framework.
 - 1.1.1 Evidence of commitment of senior management and board.
 - 1.1.2 Effective consultation, communication, monitoring, evaluation and reporting mechanisms throughout the organisation.
 - 1.1.3 Clear accountability for implementation and resources allotted in pursuit of gender equality
- 1.2 Establish a monitoring and evidence base.
 - 1.2.1 Monitor over time.
 - 1.2.2 Obtain qualitative and quantitative data from paid staff and volunteers.
 - 1.2.3 Identify any discrepancies in gender representation and/or progression, and identify factors that may be causing them.

Principle Two:

Appointment and selection processes and procedures that encourage men and women to apply for paid staff and voluntary positions at all levels

- 2.1 Ensure that processes and procedures are fully inclusive.
- 2.2 Take positive action to encourage under-represented groups to apply for paid and voluntary positions.
 - 2.2.1 Monitor recruitment of paid staff and volunteers, looking at the proportion of men and women at each stage.
 - 2.2.2 Identify any discrepancies and investigate why this might be the case, taking action as necessary.

Principle Three:

Organisational structures and systems that support and encourage the personal development and promotion of all paid staff and volunteers.

- 3.1 Transparent appraisal and development.
- 3.2 Transparent promotion processes and procedures.

Principle Four:

Organisation, structure, management arrangements and culture that are open, inclusive and transparent, and encourage the participation of all paid staff and volunteers.

4.1 Promote an inclusive culture.

4.1.1 Ensure processes, procedures and practices are fully inclusive.

4.1.2 Gender awareness included in the training for all paid staff and volunteers.

4.1.3 Promote inclusive social activities and other opportunities for mutual support and interaction.

4.1.4 Use positive, inclusive images in both internal and external communications.

4.1.5 Recognise the full range of types of contribution and roles.

Principle Five:

Flexible approaches and provisions that enable all individuals to optimise their contribution to their organisation

5.1 Support and promote flexible working practices.

Appendix Two

The GEP Participant Organisations

1. **Organisation A** is a registered provider of social housing and was established almost 50 years ago. It is an Industrial and Provident Society (rather than a Registered Charity) regulated by the Homes and Communities Agency. The Association works in partnership with other Jewish welfare charities. It has approximately 35 paid staff of which about 66% are female. The board was about one third female at the time of GEP.
2. **Organisation B** is a federation of independently run synagogues. They focus on programming for young people; rabbinic, professional and volunteer leadership training; community development; educational projects; communications and publications. They have 17 paid staff or less at any one time of which about 66% are female. The board was about one quarter female at the time of GEP.
3. **Organisation C** is a London-based International organisation. It supports programmes addressing the needs of vulnerable communities in 20 countries through more than 70 programmes. They have approximately 25 paid staff of which about 75% are female. The board was about one third female at the time of GEP.
4. **Organisation D** works in the UK and Israel, advocating democracy and equality for all Israelis and a shared society. It drives positive social change, building coalitions and empowering activists. At the time of GEP it had 6 paid staff of which four were female. The board was about one quarter female.
5. **Organisation E** is a registered charity founded more than 170 years ago. It runs two residential homes caring for older people, providing assisted living, residential, nursing and dementia care accommodation. It has between around 350 paid staff of which about 75% are female. The board was about one quarter female at the time of GEP.
6. **Organisation F** is a museum whose mission is to engage all people, irrespective of background or faith, in the history, identity and culture of Jews in Britain. It has approximately 25 paid staff of which more than 80% are female. The board was about one third female at the time of GEP.

NOTE: in each organisation, 'paid staff' numbers include full and part-time staff.