

# ACT Gender Equality Audit and Monitoring (GEAM)

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# Welcome to the GEAM manual



This document provides hands-on guidance for setting up and launching a Gender Equality Audit and Monitoring (GEAM) questionnaire.

The GEAM has been developed in the frame of the ACT project. See <https://www.act-on-gender.eu> for details.

To use the GEAM survey instrument please visit <https://geam.act-on-gender.eu> and apply for an account.

The most recent version of this manual is found at <https://act-on-gender.eu/geam-manual> comments and contributions are welcome on [Github](#).



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# Preface

This document provides hands-on guidance for setting up and launching a Gender Equality Audit and Monitoring (GEAM) survey. The GEAM survey is an integrated environment for carrying out survey-based gender equality audits in organizations. It aims to enable interested researchers as well as gender equality practitioners with little experience in the social sciences and survey methodology to deploy questionnaires that generate high-quality data.

The GEAM tool is based upon the Athena Survey of Science, Engineering and Technology (ASSET), which has been used to explore gender differences in the perceptions and experiences of male and female academics working in Science, Technology, Engineering, Mathematics and Medicine (STEMM). It has been extended with new questions/topics and adapted to better fit the varying national contexts in Europe. The GEAM tool has been developed within the framework of the ACT project. Development was led by Advance HE (UK), FUOC (Spain) and Notus (Spain) in collaboration with the Consortium.

The following document provides concrete instructions to setup and customize the GEAM survey. It is structured as a hands-on manual which will take interested researchers from the initial setup of the questionnaire, to its customization, deployment and the downloading of results.

The overall support for the GEAM includes a template to generate the descriptive statistics from the survey as Word file. Guidance on in-depth analysis of survey items is available as a separate manual.

The GEAM has been implemented with the LimeSurvey Community Edition survey platform. LimeSurvey is a software package for carrying out professional surveys and as such resembles similar environments such as SurveyMonkey or Google Forms. However, contrary to these commercial solutions, ACT has opted for a freely available open source survey platform, in order to comply with data protection requirements of our project, and minimize long-term costs while being able to offer advanced survey features at no additional costs.

Since the ACT GEAM tool is implemented with LimeSurvey CE hosted on the ACT server, this guidance document combines issues related to the content of the survey with more technical issues of using the LimeSurvey platform.

Main references to be consulted with this document:

- The LimeSurvey Manual available online in different languages: <https://manual.limesurvey.org/> Consult this document for technical issues with the LimeSurvey platform itself.
- The documentation of the GEAM survey modules and choice of measurement scales and related scientific literature <https://zenodo.org/record/3476726>
- The GEAM Analysis Manual including instructions on how to conduct in-depth statistical analysis and for interpreting the results is available here.

You can consult an online version of the GEAM survey under the following URLs:

- version 1: <https://www.act-on-gender.eu/survey/index.php/520000?lang=en>

- version 2: <https://www.act-on-gender.eu/survey/index.php/511548?lang=en>

Version 1 of the GEAM has been revised during Spring 2021 incorporating feedback from several deployments in universities across Europe during 2020. The resulting version 2 of the GEAM is optimized and shortened.

## GEAM Translations

The GEAM questionnaire is available in 8 additional languages, apart from English. The translations have been made possible by the generous contributions of the following people:

Language	v1	v2	Translated and revised by
Portuguese	x	x	Ana Petronilho, Universidade Nova de Lisboa, Portugal
German	x	x	Kathrin Rabsch, TU Berlin, Germany
Polish	x	x	Ewa Krzaklewska, Paulina Sekuła, Marta Warat, Uniwersytet Jagielloński, Poland
Lithuanian	x	x	Aurelija Novelskaite, Vilnius University, Lithuania
Ukrainian	x	x	Tetiana Median, Chernivtsi National University, Ukraine
Slovenian		x	Ana Hofman, Jovana Mihajlović, Research Centre of the Slovenian Academy of Sciences and Arts, Slovenia
Spanish	x	x	Blas Fernandez, FLACSO Argentina; Sergi Yanes, UOC, Spain
French	x	x	Florian Beauvallet, Conférence des chargés de mission parité diversité, cped-egalite.fr
Italian		x	Natasha Segal, SmartVenice, Italy
Greek		x	Leonidas Antoniou, Cyprus
Czech		x	Jarmila Lancošová, Czech Academy of Sciences, Czech Republic
Romanian		x	Alisa Petroff, UOC, Spain
Serbian		x	Balsa Delibasic, University of Belgrade, Serbia

## ACT Consortium

The ACT consortium consists of 17 partners: Fundació per a la Universitat Oberta de Catalunya (project coordinator, Spain), Portia (UK), NOTUS (Spain), Joanneum Research Forschungsgesellschaft MBH (Austria), Advance HE (UK), Loughborough University (UK), Facultad Latinoamericana de Ciencias Sociales (Costa Rica), Technische Universität Berlin (Germany), Karolinska Institutet (Sweden), Science Foundation Ireland (Ireland), Umweltbundesamt (Germany), Stiftung Deutsches Elektronen-Synchrotron (Germany), Centre National de la Recherche Scientifique (France), Fundació Centre de Regulació Genòmica (Spain), Uniwersytet Jagielloński (Poland), Znanstvenoraziskovalni Center Slovenske Akademije Znanosti in Umetnosti - ZRC SAZU (Slovenia), and Haskoli Islands (Iceland).

## Terms of use



This work by Jörg Müller, Amanda Aldercotte, Sergi Yanes, Memory Malibha-Pinchbeck, Kevin Guyan and the ACT Consortium is licensed under [Attribution Non Commercial ShareAlike 4.0 International \(CC BY-NC-SA 4.0\)](https://creativecommons.org/licenses/by-nc-sa/4.0/) license.

# Chapter 1

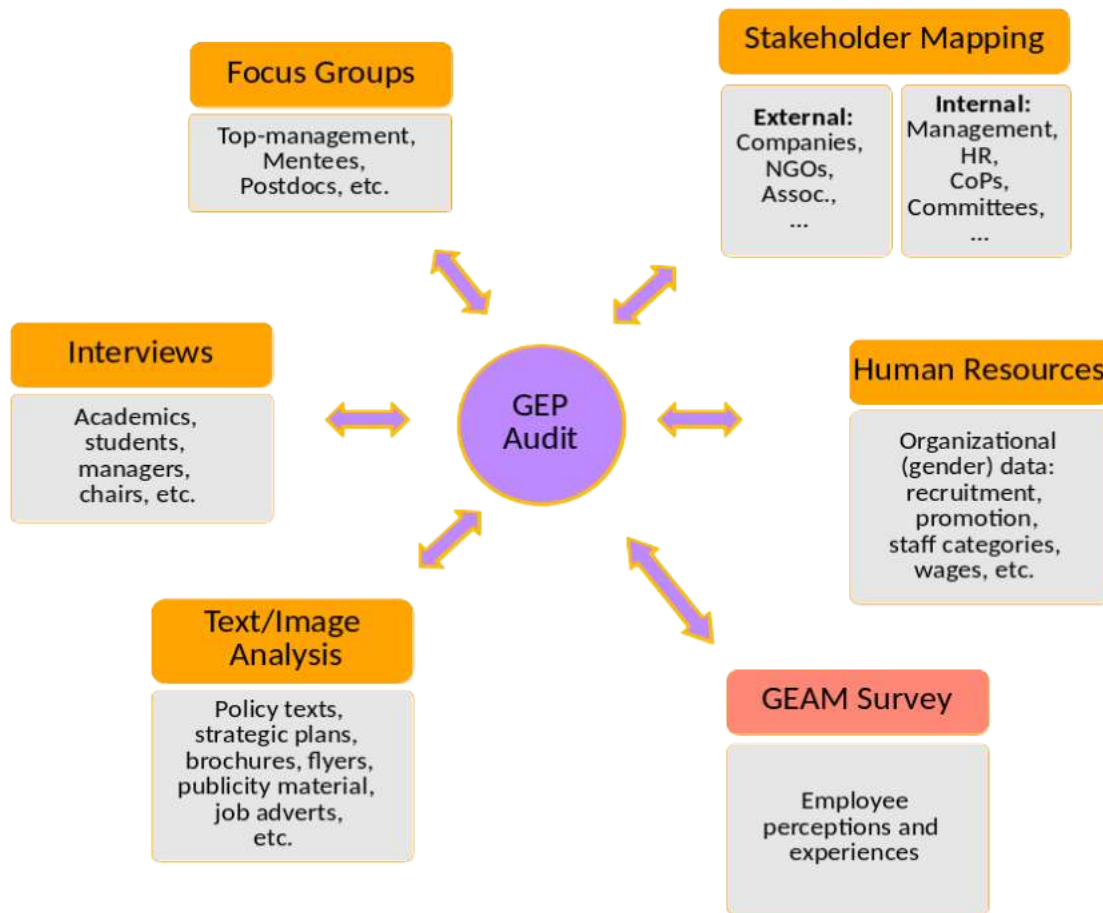
## Understanding the GEAM

The ACT Gender Equality Audit and Monitoring (GEAM) survey is a modular questionnaire framework which captures the perceptions of employees regarding key dimensions of gender equality within an organizational unit. Ideally it is launched during the initial stages of a Gender Equality Plan to understand better the specific challenges faced by each institution from the perspective of its employees. As such it complements other types of data collected for example from Human Resource departments on the representation of women and men across different staff categories and salary brackets.

The GEAM questionnaire offers a second layer of insights abouts people's experiences and perceptions within an organization. Perceptions are important for example to understand the working climate, experiences of bullying or harrassment, burnout or job satisfaction. Overall, it provides a holistic picture regarding the experience of gender equality that goes beyond the basic, numerical representation and participation of women and men within an organization. It offers a unique tool to capture the perceptions and experiences of **working conditions from a gender perspective**.

### 1.1 GEAM as *one* element of GEP Audit

The GEAM survey is a starting off point that provides organisations with a consistent and validated means of collecting gender equality data. As such it forms part of the usual GEP design, implementation and monitoring processes. As such it should be used in conjunction with other means of data collection, such sa focus groups, semi-structured interviews, document analysis as illustrated below:



In addition, the GEAM should not be seen as something that can be setup and run by a single person. Rather, it requires a combination of key individuals from the organisation to setup and above all **interpret the results** of the survey in context, to determine what these results mean in terms of the organisation's next steps for their gender equality plans, and to implement these action plans effectively.

In the UK, for example, the Athena SWAN charter programme describes the collection of gender equality data as only part of the process. Institutions and departments applying to this gender equality award scheme, as a very first step, need to create a self-assessment team that includes:

- staff who can collect and analyse the appropriate data (e.g. researchers and social scientists from within the organization and representatives from Human Resources with access to staff data);
- decision-makers who can ensure that gender equality work in the organization receives the resources required to deliver it, and integrate the findings into organizational strategy and decision-making.

An effective self-assessment team must have authority within the organization, and include a **variety of staff members** so that those involved in the interpretation and application of the research results are representative of the overarching staff population of the organization. For example, the team should include staff on different types of contracts (i.e. full- versus part-time; researchers, academics and administrative staff) and from different parts of the organization (i.e. one person from each faculty or department).

Having an effective team and undertaking a thorough self-assessment is key to an organization's gender equality research and planning. A thorough self-assessment includes, but is not limited to the following activities:

- Reflecting on a range of quantitative and qualitative data to identify both challenges and opportunities with regards to gender equality, collected through the GEAM as well as through other methods such as focus groups and interviews with key members of staff.
- Evaluating relevant policies, practices and activities.
- Responding to the findings of the above and establishing gender equality-based priority areas and appropriate aspirations and targets.
- Developing an evidence-based, comprehensive action plan to underpin advancement against the agreed priorities.
- Evaluating the effectiveness of actions undertaken on an ongoing basis, to ensure actions are delivering impact against objectives, and evolving the action plan in response to evaluation.

The GEAM should be seen as an available instrument that a self-assessment team can use to gather high quality data within their organization.

## 1.2 Thematic coverage and modules

The GEAM tool includes several thematic question modules that cover different aspects related to gender equality in the work place:

- **Socio-demographics/ academic position** questions collect information on the following: date of birth, citizenship status(es), religious belief, gender, sexual orientation, trans history, disability, highest qualification, parents' highest qualifications and net salary.
- **Working conditions** questions collect information on the following: position in organization, academic field, bonus, faculty/ department, contract type, career access, progression, barriers and development training, caring responsibilities, work role responsibilities, job satisfaction, work-family balance, leave support and workload.
- **Organizational culture and climate** questions collect information on representation of men and women, gender equality, differences in allocation of roles, promotions, treatment, perceptions of work environment and climate, recruitment factors, promotion factors, masculinity perceptions.
- **Interpersonal behaviors and experiences** questions collect information on microaggressions, harassment, bullying and stalking, organizational workplace culture on bullying and harassment.

## 1.3 Adaptability and comparability

The GEAM builds on the ASSET 2016 Survey developed by Advance HE and offers a standardized monitoring tool to be utilized by higher education institutions across the EU and beyond.

Additional questions and response options, where possible, use proven measurement scales that show reliable results for internal consistency such as a high Cronbach alpha mean. An overview of the scientific background literature for the chosen scales is available in (Aldercotte et al. 2019).

In order to maintain the quality of the collected data, we recommend to **not modify individual answer options**. The GEAM survey consists of the GEAM Core questionnaire, which is a set of standardized questions that have been tested across the EU and beyond. The phrasing and response options of the GEAM Core should not be modified, as they have been designed with comparability across individual organizations in mind. However, the GEAM needs to be flexible and adaptable to the specific context of the target organization or organizational unit. As such we have included a repository of additional questions (in the Extended GEAM) that can be added, modified and personalized to individual contexts. The balance between comparability of data, data quality and the relevance of the questionnaire for a given organizational context is not always easy to achieve.

In section [Adapting questionnaire content](#) we provide an overview which questions **need to be adapted**. If you need to make changes to other questions, we recommend to delete/add entire questions but **not to modify the wording of question texts or answer options**.

## 1.4 Overview of the GEAM workflow

The GEAM tool includes several components that facilitate the steps involved in designing, launching, and reporting of an online questionnaire. A standard workflow for carrying out a GEAM survey and reporting is shown in the following illustration (from left to right):

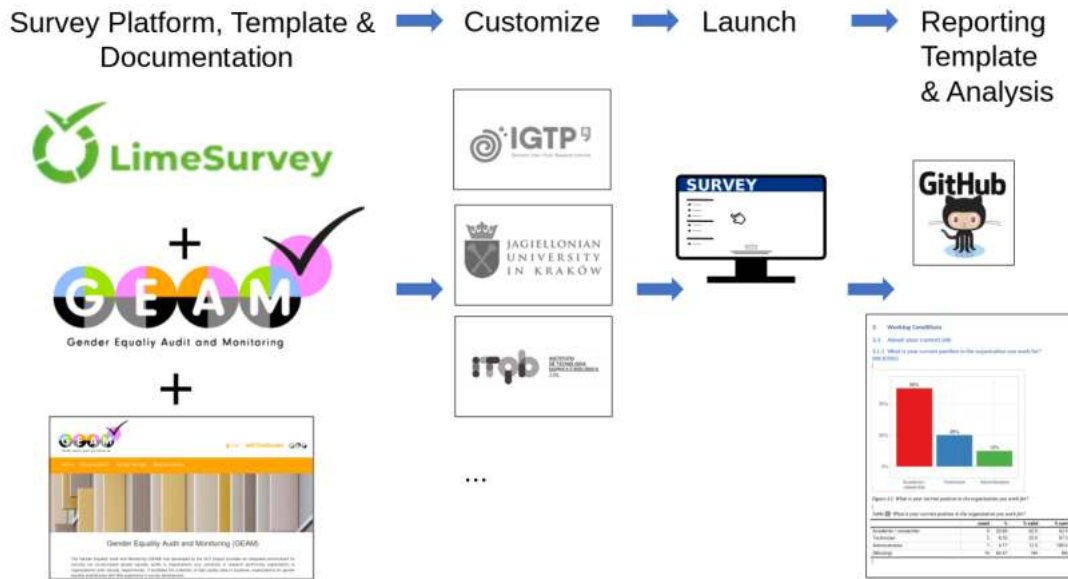


Figure 1.1: Overview of GEAM infrastructure

1. The GEAM questionnaire provides the initial building block. It is already implemented in 8 languages using the ACT LimeSurvey installation.
2. After gaining access to a new copy, survey administrators can concentrate on customizing questionnaire content to their specific organizational needs. Extensive documentation is available (in this document) to help users to manage LimeSurvey, adapt questions and safely manage their data.
3. The survey is then ready to launch. Survey administrators can monitor response rates and manage reminders for as long as needed.
4. After the completion of the survey, a reporting template is available to generate the descriptive statistics report. A further analysis handbook guides readers to carry out a more in-depth statistical analysis and interpretation of their results.

The GEAM framework substantially reduces the time needed to setup and launch an online survey. Together with the reporting templates, it furthermore saves valuable time on the reporting task - time that can be reinvested in the interpretation of results and the design of gender equality measures.

## 1.5 Visual quickstart

For an overview of the GEAM tool see [GEAM Introduction](#)

For basic notions of how to edit and adapt the GEAM questionnaire see [GEAM First Steps](#)

## Chapter 2

# Data protection and privacy issues

Protecting privacy and confidentiality of survey respondents is a key concern and has to be considered carefully before preparing and launching a survey. This involves a clear understanding of the concepts involved and to clarify the legal and organizational requirements for the survey. It also involves following certain standards for data management, storage and data reuse.

### 2.1 About privacy and confidentiality

Although “privacy” and “confidentiality” are often used interchangeably the concepts should be distinguished (European Commission [2010](#)).

**Privacy** is a more fundamental concept and entails the a) control of information about oneself, b) control over access to oneself (both physical and mental), c) control over one’s ability to make important life decisions.

**Confidentiality** on the other hand is a more limited concept and concerns first and foremost the protection of personal information. “Confidentiality is a duty that arises when someone has been granted access to information that would otherwise be kept secret” (European Commission [2010](#), 79ff).

Most importantly, privacy considerations limit the ways in which we acquire information, whereas confidentiality considerations deal with the protection of this acquired information.

In concrete terms, the distinction between “privacy” and “confidentiality” implies to specify how privacy is protected during data collection, including the decisions to (not) participate, and how the collected data will be handled in a confidential manner after it has been recorded.

For the GEAM survey, privacy implies to give respondents relative control over data entry (“what” and “when”), including the possibility to opt out and delete their data at any moment during the submission process. Confidentiality implies that result data is anonymized and stored in a secure way to prevent unauthorized access.

## 2.2 Introduction to the General Data Protection Regulation (GDPR)

The [EU General Data Protection Regulation](#) (GDPR Regulation 2016/679) is a regulation by which the European Parliament, the Council of the European Union and the European Commission intend to strengthen and unify data protection for individuals within the European Union (EU).

The GDPR enhances the rights of ‘data subjects’ (individuals to whom personal data pertain) and provides clear conditions for collecting, storing, processing and transferring personal data (including ‘special categories’ data) by institutions. It is advisable to become familiar with the principles outlined in Article 5 of the GDPR, which address the following:

- Accountability
- Lawfulness, fairness and transparency
- Purpose limitation
- Data minimization
- Accuracy
- Storage limitation
- Integrity and confidentiality.

The GDPR is applicable to data processing. This includes data collection, recording, organization, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction.

## 2.3 Collecting personal (sensitive) data

The GDPR draws a distinction between “personal data” and “personal sensitive data”.

**Personal data** means “any information relating to an identified or identifiable natural person (‘data subject’); an identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person” (article 4.1).

**Sensitive personal data** or special categories of personal data refers to information revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, data concerning health or data concerning a natural person’s sex life or sexual orientation (article 9).

The GEAM includes items inquiring about Sensitive Personal Information (e.g. sexual orientation, health impairments or reporting discrimination associated with ethnicity) because these variables also constitute the main dimensions of social discrimination (Baumann, Egenberger, and Supik 2018). From our perspective, it is important to address these sensitive issues in the GEAM because otherwise important discriminatory practices will remain invisible and cannot be addressed by adequate Gender Equality measures.

The FUOC is responsible for providing a technical secure solution to conduct online GEAM surveys. However, the survey content and handling of result data will be the responsibility of the survey administrator.

In the last instance it is the survey administrator who has to decide the adequate security settings for a specific survey instance taking into account the GEAM content, national legislation and organizational information needs and context(s). In other words, it is up to individual organizations to specify who will have access to the raw data and how it will be stored securely.

Furthermore, it is up to organizations and the survey administrators to make sure that the GEAM survey is accompanied by adequate information for respondents to provide informed consent. Specifically, you must provide:

- Information about your organization: including name and contact details, details of your representative (if relevant) and contact details of your Data Protection Officer.
- Information about the type of data you will collect: for example, gender, contract details, salary, etc.
- The purpose of collecting the data: including what you will use it for and whether it will be used to make an automated decision; the legal basis for using the data including any 'legitimate interest' relied upon. -Who will receive or have access to the data: for example, members of an Equality, Diversity and Inclusion committee, Human Resources, or a Gender Equality Planning group.
- Other information: including whether the data will be transferred, stored, or processed outside the EU and on what basis; how long the data will be stored for; what security arrangements are in place to protect the data; whether provision of the data is required and the consequences of not doing so.
- Data subjects' rights: the right to be informed; right of access; right to rectification; right to erasure; right to restrict processing; right to data portability; right to object; and rights in relation to automated decision making and profile.
- Contact information: who they can contact in relation to questions or complaints.

It is important to provide a means for individuals to give consent to your processing of their information after they have read the above information. An example statement for the collection of personal and sensitive personal data forms part of the GEAM questionnaire. It is the default setting in the GEAM LimeSurvey platform that requests respondents to accept the data protection statement before they can proceed to answer the survey. Survey administrators are nevertheless **advised to carefully revise this statement** together with the legal support of the targeted organization before launching their survey.

Questions and response options may need to be adapted according to an **organization's or country's legal requirements** where it affects monitoring practices, policies and the terms used to describe populations. Survey administrators, when editing questions and response options on protected characteristics, need to be aware of the rights and permissions in their country. For instance, they **need to know if permissions to collect data on protected characteristics such as sex, race and sexual orientation** differ or require an organization to re-phrase the language in the survey to be in line with regulatory standards.

When editing questions or response options for regulatory reasons, it is recommended that you use tried and tested, nationally accepted replacements (for example, the response options presented in a national census). This will increase the likelihood that other organizations in the same country have used similar questions and response options, producing a standardized approach and enabling organizations to benchmark themselves nationally.

In order to make informed decisions regarding privacy protection and confidential treatment of result data, please make sure to read this document carefully, especially the section on [Controlling data privacy and response tracking](#). You will also be required to sign the [Annex III - Declaration of Data Protection and Confidentiality Agreement](#) for survey administrators before you can launch a survey (you can still edit and prepare your questionnaire without having signed the

agreement with the FUOC. However, before collecting data, you will need to provide a signed copy).

Finally, additional information regarding the collection of sensitive personal data and considerations for primary research are discussed further in Advance HE's research and data briefing on GDPR compliance (Christoffersen 2018).

## 2.4 Data storage

Once a survey has finished and the result data matrix has been downloaded from the LimeSurvey platform, we recommend the following steps to protect the confidentiality of the responses and prevent unauthorized access to your data.

### 2.4.1 Anonymization

Anonymity means that a person participating in the research cannot be identified from the information provided. This is distinct from confidentiality, which is when the researcher or data collector knows the identity of the person, but keeps this information secure, and anonymizes data before being published. For more on this distinction see Advance HE's briefing on ethics in primary research (Haley 2017).

The GEAM does **not contain** questions regarding direct personal identifiers such as social security number, names, email addresses or similar. Thus, the collected data is anonymous on a very basic level. LimeSurvey does not store any personal information with the survey results either. However, respondents might provide certain identifiers in open text questions such as organizational names or names of colleagues which unintentionally can identify their (and others) contributions.

Please check the open text fields in your result data for any plain names and other possible identifiers submitted by respondents. Before further processing your results. We recommend replacing these instances with custom codes or XXX-ing them out.

### 2.4.2 Encrypting result data

A relatively easy but seldom applied measure to protect your data is to save the corresponding file(s) with a password. This works mainly when the results are downloaded as a Microsoft Excel file.

Before sharing the result data with the inner circle of colleagues, please password protect the file. Do not send the password together with the file (in the same email!).

More sophisticated options are available such as using digital signatures and GPG encryption. GPG encryption is easily available on Linux operation systems. For Windows, see <https://www.gpg4win.org/>. The advantage of using advanced encryption techniques consists of protecting your data with a personal signature/password without limitations to share data with others. The architecture of public and private encryption keys enables you to encrypt data with a specific addressee in mind – and which then can be only decrypted by that particular person.

This basically enables you to share protected data without having to worry about circulating a single password (used for encryption) among collaborators.

### 2.4.3 Deletion

Note that when deleting data from a computer, the file is not actually erased but moved to a trash-bin and can be easily recuperated. This is especially important when working on a shared computer. When you download the result dataset, make sure others (including administrators) cannot access it at a later point in time.

Data should be stored on your personal (Desktop) account (protected by your password) or on an encrypted shared drive (e.g. a cloud drive or the organization's virtual private network). In either case, the folder in which the data are stored should be restricted to a set of one or two individuals who require access to the raw data. If you store it on an external (flash) drive, the drive should be encrypted or password protected in order to prevent unauthorized access in case of loss.

## 2.5 Disclosure control

Whereas “anonymization” can remove or replace identifiers from a dataset and thus prevent the identification of respondents, “quasi-identifiers” pose a different challenge. Quasi-identifiers refer to the variables used in the study and whose combination can lead to the re-identification of the respondent. For example, Golle (2006) and Sweeney (2000) show that 63% (or 87% respectively for older data) of the US population can be unambiguously identified by combining a 5-digit ZIP code, birth date and sex!

Please consider whether the person to whom the data pertains might still be identified through indirect identifiers (e.g. occupation, salary); by people who know them or the context; or by those who have access to other information which, when combined with the data, might allow them to be identified. In these cases, it is necessary to take further action beyond removing names to anonymize the data. The GDPR contains a strict definition of anonymity: it considers data anonymous only when it cannot be identified by any means “reasonably likely to be used . . . either by the controller or by another person”. This means that if the data could be re-identified by any person using ‘reasonable effort’, it would not be considered to be anonymized, and respondents would need to be made aware of this during the consent process described above. For example, if a report summarizing the proportions of men and women working in individual roles only included one female respondent from a specific department, it is possible for this single individual to be identified by her colleagues.

In case you plan to distribute the raw data beyond the inner circle of persons involved with the collection and analysis of the GEAM, you need to carefully think about your quasi-identifiers. Quasi-identifiers need to be examined in relation to the number of respondents in your data. For example, a combination of professional category, age and gender might be enough to identify a person in a small research institute but insufficient in a dataset of several hundred or thousands of respondents.

If there is a small number of respondents within a certain category, this identifier may need to be removed before sharing to prevent breaching participant confidentiality and anonymity. Alternatively, it may be better to refrain from sharing the raw data and instead only share the results of the survey in summary tables that have small numbers represented as less than values (e.g. groups with fewer than 5 individuals are represented as ‘< 5’ instead of listing the exact frequency) or by applying a rounding strategy (e.g. all frequencies are rounded to the nearest 5 and any percentages with denominators of less than 22 individuals are suppressed).

Finally, when there are few participants, anonymization can also involve creating groupings from certain variables. For example, the GEAM collects data on respondents’ nationality, which could

be transformed into groups by continent, or by EU versus non-EU, both of which would decrease the likelihood of them being identified.

## 2.6 Sharing data

Given the potential disclosure control issues, the ACT project does not publish any result data tables of GEAM questionnaires.

Survey administrators are advised at this point to only publish survey results in aggregated format.

## Chapter 3

# Setting up a GEAM Questionnaire

The GEAM questionnaire is hosted and managed by the FUOC, coordinator of the ACT project. The technical features of LimeSurvey CE require a host in order to centralize the management of accounts and creation of questionnaires.

### 3.1 Request an account / copy of the GEAM questionnaire

In order to use the ACT LimeSurvey installation you need to request an account by email to [info@act-on-gender.eu](mailto:info@act-on-gender.eu) providing a valid email address and full name for your account. We can create up to four additional user accounts for a given survey. This is useful if you want to manage your survey between several people – just include the additional emails and full names. If you request more than one user account for a given questionnaire, indicate the person responsible as survey administrator. Each questionnaire requires a main survey administrator whose email will be used for survey- or bounce notifications.

Please also include in your email a short description about the target audience / organization or organizational unit you want to use the GEAM for. If not stated otherwise, your account will have an instance of the GEAM pre-installed.

You will be notified about your account creation via email. After login on, the questionnaire under your ownership will be displayed.

### 3.2 Default user account rights

The ownership of the survey will remain with the system administrator until you have signed and returned the “Declaration of Data Protection and Confidentiality Statement” provided in Annex 3. After we receive your signature, we will transfer ownership of the survey to the survey administrator.

Each user will have the same access rights:

- You can edit, create, delete all content of the questionnaire
- You can modify the settings of the survey
- You can only launch a survey upon signing and returning the “Declaration of Data Protection and Confidentiality” Statement provided in Annex 3.
- You can delete the entire survey. Caution: deleting a survey will also delete all data. This action cannot be undone!

- You can not create new questionnaires or create user accounts.

Basically, you have all rights concerning your questionnaire and survey but no rights beyond that on the LimeSurvey platform as such.

### 3.3 Taking responsibility (for data)

Once your account has been created you can start editing your copy of the GEAM. You can add and delete sections and adapt the data policy text. Since the survey administrator will be responsible for adapting the GEAM to the specific organizational context, it will be the survey administrator who is responsible for the questionnaire content and result data.

You can only launch the survey – and thus start to collect data – once you have signed and returned the corresponding [Annex III - Declaration of Data Protection and Confidentiality Agreement](#).

### 3.4 Adjusting global questionnaire settings

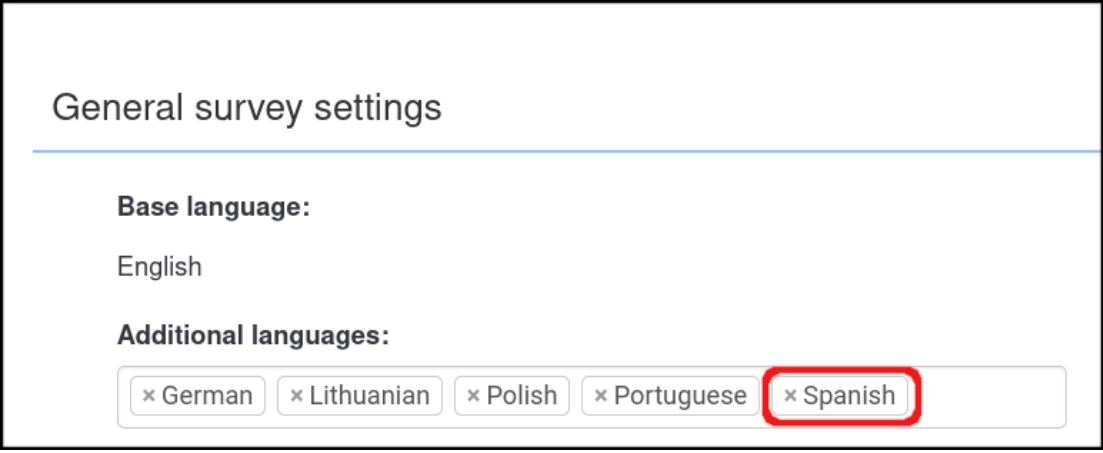
The GEAM as well as any other questionnaire requires adjusting of global settings.

#### 3.4.1 Language(s)

The GEAM questionnaire is available in different languages, including in English, Polish, Lithuanian, Spanish, German, French, Slovenia, and Ukrainian.

All elements of the GEAM are translated to the listed languages, including data policy texts, general text messages, questions and response items.

We recommend to **delete** any language not used in your survey. Deleting a language from the questionnaire is done under General Survey Settings by simply removing the corresponding language tag. In the below example, the Spanish version of the questionnaire would be deleted.



General survey settings

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**Base language:**

English

**Additional languages:**

Once a specific language version has been deleted, it can't be restored. You would need to delete the entire questionnaire and import the GEAM from scratch, potentially losing all changes you already incorporated to your current version.

In case you want to **add an additional language**, please be aware that this requires the translation of the entire questionnaire, including all question and answer texts, which is quite time intensive. You can add any additional language by:

1. clicking the “Additional Languages” input field and choosing from the drop-down menu.
2. Save your General Survey Settings.

3. Then translate all elements of the questionnaire by clicking “Tools > Quick translation tool”.

Corresponding section online manual:

[https://manual.limesurvey.org/General\\_settings#Additional\\_languages](https://manual.limesurvey.org/General_settings#Additional_languages)

Survey respondents can choose any of the available languages before starting to respond to the questionnaire or even during their response process.

Any adaptations or editing you undertake in your questionnaire needs to be **mirrored across all languages** you plan to use.

### 3.4.2 Navigation

LimeSurvey offers different options for navigating an active survey. Being an online environment, the navigation (and responses) can be organized by sub-sections or pages. For relatively short questionnaires, all questions can be presented in one-go, on a single page. For larger questionnaires, we recommend to organize user responses by sub-dividing the questionnaire in different thematic sections (this is the default setting). The GEAM is sub-divided in 9 thematic sections where questions and response items for each section are presented on a single “page”.

“Page” refers here to a webpage, i.e. users can respond to all questions of a given section without having to make another call to the web server. Depending on the specific questionnaire section, this still can involve many questions and answer options that would not fit onto a standard DIN A4 printed page.

Under “General Settings”, you can select how survey respondents may navigate between sections. The default settings for the GEAM in terms of navigation is “Group by Group”, i.e. the questionnaire is divided into 9 sub-sections. When deciding between this option or the two other alternatives - “Question by question” and “Single page” - one needs to strike a balance between the length of the questionnaire, providing contextual information about certain question sections and the necessity to save intermediate responses.

### 3.4.3 Presentation

Under “Settings > Presentation” user can control the display of the the questionnaire. Most importantly, the display of **questions codes** can be turned off.

**Show question number and/or code:** “Show question number only”. This will hide the question code (e.g. WCWI006 used for internal identification of question) and leaves only the automatic question number visible, starting at 1.

Other important adjustments concern:

**Show question index/allow jumping:** “Full”. This means a “Table of Contents” for the entire questionnaire will be displayed, enabling respondents to jump between the different sections of the survey without progressing in a linear fashion. This might be helpful if users want to jump to the last section on “Socio-demographics” without necessarily filling in certain sections before.

It might be a disadvantage if you need certain information from an “earlier” section for routing and making decisions regarding a “later” section in your questionnaire. Providing a questionnaire index also allows users to explore the different sections before answering any. “Incremental” means that the overall presentation of the questionnaire is linear (you can’t jump ahead), but that users can navigate to earlier sections backwards in a non-linear way. This might be useful if you want to allow users to jump to the first page from the last without clicking the “Back” button on each page one-by-one.

**Show group name and/or group description:** “Show both”. This refers to the descriptions the GEAM provides for each of the 9 sections. It helps respondents to contextualize the questions of each section. In some cases, e.g. “Behavior - Bullying, Harassment, Microaggression”, the description contains definitions of each of the terms used. Should be set to “Show both”.

**Show progress bar:** “On”. Informs respondents about the progress made, i.e. how many questions are left.

See the corresponding section online manual:

<https://manual.limesurvey.org/Presentation>

### 3.4.4 Target population

Before adapting the questionnaire content, it might be worth to think a moment about the target population and how to best reach it and invite participation. In an ideal situation, the detailed contact information about the target population would be known (e.g. names and email addresses of all faculty members). In most real-world scenarios, however, the target population is defined with less precision, including for example “All employees” or “All members of an inter-organizational association”.

Thinking about the target population is important not only for estimating the number of expected responses but also for making decisions regarding the distribution of the survey and response tracking.

Let’s take the example of the GEAM which most likely will be distributed within a research center, an entire university or specific faculties or departments.

In an ideal situation, you have the contact information (including email) of your target population. This has advantages in terms of personalizing invitation emails and in terms of response tracking (see “Comfort privacy setting”) but also in terms of controlling who has access to the survey. Since invitations are personalized, all responses use a unique token while being submitted. Nobody without an invitation can participate in the survey.

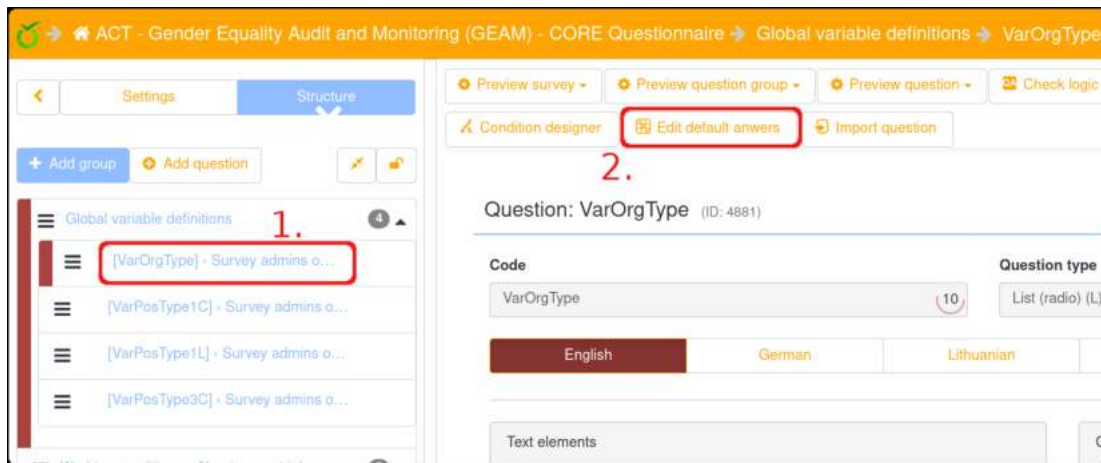
Under many circumstances, a detailed database of email addresses of survey respondents is not available while the target population is still relatively well defined. For example, the target population could be “all academic staff” in an organization or “all students”. Using available internal communication channels (e.g. email distribution lists), a generic link to the survey can be distributed easily. However, by providing a generic web address of the survey, potentially any persons with access to the URL can also fill in the questionnaire. Thus, control in terms of undesired responses is very limited. For example, a student with access to the survey link could respond to the survey that targets academic staff only.

### 3.4.5 Choose organizational unit

Deciding on a certain target population is also important for **choosing the organizational reference category** for some questions. For example question 38 of the GEAM asks about the importance of certain factors when deciding to apply for- or take up a post in your current “workplace”. Depending on the target population, survey administrators can select the desired organizational unit and replace “workplace” with “organization”, “faculty”, “institution”, “department”, “office”, “research unit”, “institute”.

In order to **contextualize** the survey to a given **organizational unit**, switch to questionnaire “Structure” and open the first question group, called “Global Variable Definitions”.

1. Click “[VarOrgType > ...]”
2. Click button “Edit default answer”



3. Now select the desired organizational unit from the dropdown menu and save your changes. Repeat this step for all active languages.



In the above example, the organizational reference unit is “department”. the “PLACEHOLDER-CHECK-EN” will be replaced with the word “department” in all corresponding question texts and answer items.

In case the desired organizational unit of the target population is not listed, a new entry can be aggregated by “Edit answer options”. Note that new answer options need to be provided for all activated languages.

An alternative option is to replace manually the variable “{VarOrgType.shown}” in question texts and sub-question items.

### 3.5 Adapting questionnaire content

After a new GEAM has been created, some content needs to be adapted.

Avoid changing question codes. Codes are used for generating automatically the descriptive statistics of your results. You can hide question codes before launching a survey! See “Presentation” settings above.

### 3.5.1 Text messages

Adapting the GEAM questionnaire involves writing a specific welcome and ending message for the survey. It is an opportunity to introduce the questionnaire to your respondents, explain its purpose, to whom it is addressed, why it is important to participate and what will happen to the results.

See corresponding section of the online manual

[https://manual.limesurvey.org/Text\\_elements](https://manual.limesurvey.org/Text_elements)

Under “Settings > Text Elements” please fill out:

**Survey title:** A brief title of the survey; could include reference to your organizational unit.

**Description:** Could be left empty. The description functions as a sort of subtitle to the “Survey title”. It should be kept rather short.

**Welcome message:** Most text should be placed inside this text box. This should contain ideally: - Contextualization of the survey. What initiatives (and/or people) support it. Often, mentioning top-level support, if available, is very helpful for achieving higher response rates. - Brief description of its content. What is the survey about? - To whom is the survey addressed? - Who is responsible for the survey in case of questions or complaints. This should provide at least the name and email address of the survey administrator. - Why is it important to participate? Which also relates to the next item – what will happen with the results? For example, if data is used to design gender equality policies, it is important to adequately detect most pressing issues. - What will happen to the results?

**End message:** The end message will be displayed once respondents have submitted their data at the end of the questionnaire. It is a good opportunity to thank your respondents, maybe repeat issues regarding the results and next steps from the welcome message.

**End URL:** If you want to redirect people to a different page after they have finished the survey (e.g. the home page an equality unit), please enter the corresponding URL in this field.

### 3.5.2 Data policy

LimeSurvey offers a dedicated section to specify the “Data Policy”. This includes the data and privacy protection text as well as how this it will be displayed to users before they can fill in the questionnaire.

The Data Policy is part of the home page of the survey. It will be displayed together with the “Survey title” and “Welcome message” on the landing page of an active survey. User need to click the “checkbox” indicating their agreement to the data policy in order to start the survey. Clicking on “Show policy” will open the data policy text as shown below. Note the highlighted yellow section(s) which need to be edited/replaced by the survey administrator (see below)!

**ACT - Gender Equality Audit and Monitoring (GEAM) - CORE Questionnaire**

**Welcome message.**

There are 65 questions in this survey.

**I have read and understood the following information sheet and hereby declare my consent to the processing of the collected data.**

**Show policy**

☐

**Survey data policy**

Study title: Communities of PrACTice for Accelerating Gender Equality and Institutional Change in Research and Innovation across Europe (ACT)

Funding organization: European Commission, H2020. Grant Agreement No 788204

Principal investigator:

**Survey administrator: [Name, organization and email address]**

**1. Purpose of the study**

The present study forms part of the ACT project (Communities of PrACTice for Accelerating Gender

You need to **adapt/edit the default Data Policy text** provided by the GEAM. This includes:

- provision of a valid email address and full name for the survey administrator who will be responsible for the survey and the resulting data.
- Choose one among the three available data privacy sections, “strict”, “moderate”, or “comfort”. For the detailed explanation of each of these settings see [Controlling data privacy and response tracking](#).

Be sure to adapt the data policy settings for all available languages of your survey!

### 3.5.3 Adapting existing questions and items

The GEAM contains 60+ questions. Some socio-demographic questions and response options can be adapted to collect information that provides more contextually meaningful and nationally comparable results.

For example, response options for the question “50 (SDEM002) majority/minority ethnic group” currently only contains four answer options: (1) “Majority”, (2) “Minority” apart from (3) “Unsure” and (4) “Prefer not to say”. The answer options can be edited in order to reflect more fine-grained categories which should match the nationalities and groups in each country. The response options provided in the survey based of a national census are recommended.

Please note, that question **WCJC004** has currently no answer options. Survey administrators need to **provide answer options** regarding respondents current post before launching the survey.

The following questions should be revised and adapted to the organizational context:

	Code	Question Text	Editable/adaptable
Q2	WCJC003	In which academic field do you mainly work?	Editable
Q4	WCJC004	Which of the following describes best describes your post?	Add answer options!
Q11	WCJC019	We are interested in the training opportunities available to you.	Editable
Q21	WCJC021	In the last 12 months, do you feel that any of the following have been a barrier to you accessing training that you needed or wanted?	Editable
Q22	WCWI011b	Which of the following forms of leave have you taken / or are you currently taking?	Editable
Q25	WCWI016	Please indicate the availability of the following options either before, during or upon your return from your most recent or current parental leave at your organization	Editable
Q29	WCWI021	Please indicate how helpful each of the following was in facilitating your return to work after your parental leave at your current organization	Editable
Q50	SDEM002	Do you currently perceive yourself to be part of a majority or minority ethnic group?	Editable

Other questions and response options cannot be changed. These response options allow for organizational, national and transnational standardization and comparisons. This is especially important for socio-demographic questions such as year of birth, marital or partnership status, gender, sex and current role position.

### 3.5.4 Adding or deleting questions or question groups

You can add new question groups and questions. The GEAM is organized according to 9 question groups or sections. All questions contained within a question groups will be displayed in a single page; users can navigate between questions group with the “Next” or “Back” buttons – which will save all data/fields.

See corresponding sections in the online manual

[https://manual.limesurvey.org/Question\\_groups\\_-\\_introduction](https://manual.limesurvey.org/Question_groups_-_introduction) [https://manual.limesurvey.org/Questions\\_-\\_introduction](https://manual.limesurvey.org/Questions_-_introduction)

In case new questions or question blocks are added, **translation issues** need to be considered. If the questionnaire is available in English and French for example, and a new question is added in French, the English edition will display the French entries as long as they are not translated.

Before deleting questions or question groups, we recommend to export questions or question groups before deletion. Deletions can't be undone. By first exporting a question, it can easily be imported again at a later point in time, if necessary.

### 3.5.5 Mandatory questions

As in most survey platforms, LimeSurvey allows you to indicate which questions are mandatory and which ones can be skipped. Making a question mandatory implies that users will not be able to proceed or submit their data without having answered to the required question. Making certain questions obligatory – especially for long questionnaires – always involves a delicate balance between the desired information (quality) versus not alienating the respondent who might feel that certain questions are not meaningful for their context or would like to skip certain sections. Having many obligatory questions increases the chances that respondents abandon the survey or clicks random answers to continue.

Making certain questions mandatory assures that your results meet a certain minimal threshold in terms of data quality and opportunities for analysis. For example, the results of the GEAM will be useless if users are not obliged to fill out basic socio-demographic data such as “gender” and “age”. Without this socio-demographic variables you will not be able to analyze how working conditions or organizational culture and climate or any other construct differ by gender!

You can toggle if a question is mandatory while editing it.

“On” - Question will be enforced, respondents can’t continue without responding “Soft” - Warning will be displayed before moving on, but respondents can continue without responding “Off” - No warning displayed, respondents can move on without noticing that response is missing.

The screenshot displays the LimeSurvey question editor interface. On the left, there are two text editors. The top one is titled 'Question:' and contains the text 'What is your current position in the organization you work for?'. The bottom one is titled 'Help:' and contains a detailed definition of job roles: 'Academic / researcher refers to academic teaching staff, researchers including PhD or postdoc positions. Technician includes laboratory technicians, research assistants, and other support staff for academic or research tasks. Administrative refers to administrative-, secretarial-, finance-, management- or Human Resources staff.' Both editors have a rich text toolbar with options for bold, italic, underline, link, and list. On the right side of the interface, there are several configuration options: 'Question theme' (set to 'Default'), 'Question group' (set to 'Working conditions - About cl...'), 'Other' (set to 'Off'), and 'Mandatory' (set to 'On'). The 'Mandatory' section is highlighted with a red rectangle, showing three buttons: 'On' (selected), 'Soft', and 'Off'.

## Chapter 4

# Getting ready for the launch

Before launching a survey, survey administrators need to revise the privacy settings. The following section goes into some details regarding the response tracking and anonymization features of LimeSurvey.

**Note** in the last instance it is the survey administrator that is responsible for choosing the adequate privacy settings and protecting the resulting data.

### 4.1 Controlling data privacy and response tracking

Generally speaking, responses are “anonymous” if one cannot deduce the identity of the person who has contributed a submission to the questionnaire.

LimeSurvey offers different options to store and track information about survey respondents. Adjusting the level of “anonymization” has implications not only for the protection of personal data in the unlikely event of a data breach but also for managing invitations, sending reminders, the possibility to stop and resume a submission or for canceling a submission and deleting the associated data.

Before delving into the details it is important to note that these confidentiality settings concern primarily the **management of participant data** by the survey administrator. LimeSurvey by default does not store any personal identifiers in the result table of the survey. Unless you explicitly ask for an email address, name or ID number of a respondent, the result data set does **not contain** direct, personal identifiers. The GEAM questionnaire does not ask for any such personal identifiers.

At the same time, LimeSurvey offers the possibility to **store certain meta-information** with each submission such as the Internet address of the computer used, the data and time of the submission or the URL referrer used to access the survey. In some cases, this meta-information can be used by the survey administrator to identify respondents. The identification might be justified in case a respondent requests the deletion of their data from the result table.

The confidentiality settings are controlled via three specific sections: the “Settings > Participant Settings”, the “Settings > Notification & data” and “Settings > Publication & access”.

Since the combinations of the attributes in each section can be quite complex, we introduce three possible scenarios which simplify the confidentiality settings for a given survey in “strict”,

“moderate” and “comfort”. Other configurations are possible.

### 4.1.1 Strict privacy protection

Under this setting, the “anonymization” feature of LimeSurvey is activated. LimeSurvey will not store any meta-information with survey responses, including the IP address of the computer used, the date and time of the submission or the URL referrer.

Nevertheless, respondents can interrupt the survey any moment by clicking “Resume later” at the top of each survey page and come back at a later point in time for final submission. Respondents can also “Exit and clear” a submission any time before the final submission. However, in contrast to the “Moderate privacy protection” mode (see below), submission progress is not tracked automatically: in case the browser crashes or a user leaves the survey page by accident, all data is lost. In this case, users will not be able to resume their earlier submission. Accessing the survey after a browser has crashed, will create a new response entry in the result table (while leaving the previous entry incomplete). Once a submission has been completed by pressing the “Submit” button on the last page of the survey, the submission process is considered complete and any linkage to the person responding is lost. There is no way that the identity of a respondent can be linked to an entry in the result table, neither by the respondent themselves nor by the survey administrator.

A cookie is set by LimeSurvey in order to prevent a second submission from the same browser.

Use this settings for short questionnaires where privacy protection is paramount.

In order to use the “strict privacy” settings, adjust the specified options within the corresponding sections as show below:

Click “Settings > **Participant settings**”:

Survey participant settings	
Set access code length to:	Inherit:
15	On Off
Anonymized responses:	
On Off	Inherit [Off]
Enable participant-based response persistence:	
On Off	Inherit [Off]
Allow multiple responses or update responses with one access code:	
On Off	Inherit [Off]
Allow public registration:	
On Off	Inherit [Off]
Use HTML format for participant emails:	
On Off	Inherit [Off]
Send confirmation emails:	
On Off	Inherit [On]



Click “Settings > **Notification & data**”:

Notification and data management settings

<b>Date stamp:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Enable assessment mode:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]
<b>Save IP address:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Participant may save and resume later:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [On]
<b>Save referrer URL:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Send basic admin notification email to:</b> <input type="text"/> <b>Inherit:</b> <input type="radio"/> On <input checked="" type="radio"/> Off
<b>Save timings:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Send detailed admin notification email to:</b> <input type="text"/> <b>Inherit:</b> <input type="radio"/> On <input checked="" type="radio"/> Off
<b>Google Analytics settings:</b> <input type="radio"/> None <input type="radio"/> Use settings below <input type="radio"/> Use global settings	

Click “Settings > **P**ublication & access”:

Publication & access control settings

<b>Start date/time:</b> <input type="text"/> 	<b>List survey publicly:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]
<b>Expiry date/time:</b> <input type="text"/> 	<b>Set cookie to prevent repeated participation:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]
<b>Use CAPTCHA for survey access:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	
<b>Use CAPTCHA for registration:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	
<b>Use CAPTCHA for save and load:</b> <input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Inherit [Off]	

#### 4.1.2 Moderate privacy setting (default GEAM)

This configuration uses a token-based response tracking. It is used as the default setting for the GEAM questionnaire. LimeSurvey stores certain meta-information with each submission which makes the submission process more reliable and easy for respondents while offering additional insights to the survey administrator regarding the response tracking.

Under this configuration, “anonymized” responses are turned off and the “IP address”, “Date stamp” and “URL referrer” are stored with each submission.

A unique identifier (token) is used to track the progress of a respondent’s submission. In case the browser crashes or the browser window is accidentally closed, respondents can come back to the survey and resume where they left off – even without explicitly saving their data manually with the “Resume later” button. The data entered into the questions is stored as the user advances from one section to the next. Closing the browser window and re-entering the survey via the survey link will open the questionnaire on the last page (or section) visited.

Once a submission has been finalized, respondents can restart the survey. This might be useful in case different respondents use the same browser (renewed submissions can be prevented by activating the “set cookie” option). As long as respondents have not finalized their submission they can “Exit and clear” their survey data anytime. Once a submission has been finalized (submitted), their data can be deleted from the result matrix in exceptional circumstances, that is, if a respondent is able to provide the IP address and time stamp of their submission. In case this information yields a unique entry in the result matrix, the survey administrator can delete it.

Use this configuration for longer surveys and data that is less sensitive.

In order to use the “moderate privacy” settings, adjust the specified options within the corresponding sections as shown below:

Click “Settings > **Participant settings**”:

The screenshot shows the 'Survey participant settings' page with the following configurations:

- Set access code length to:** 15
- Inherit:** On
- Anonymized responses:** On
- Enable participant-based response persistence:** On
- Allow multiple responses or update responses with one access code:** On
- Allow public registration:** On
- Use HTML format for participant emails:** On
- Send confirmation emails:** On

Click “Settings > **Notification & data**”:

The screenshot shows the 'Notification and data management settings' page with the following configurations:

- Date stamp:** On
- Save IP address:** On
- Save referrer URL:** On
- Save timings:** On
- Enable assessment mode:** On
- Participant may save and resume later:** On
- Send basic admin notification email to:** (empty field)
- Inherit:** On
- Send detailed admin notification email to:** (empty field)
- Inherit:** On
- Google Analytics settings:** Use settings below

Click “Settings > **Publication & access**”:

### 4.1.3 Comfort privacy setting

For this privacy setting, LimeSurvey will create a “participant table” which offers a precise control over the target population responses. However, it requires that the survey administrator has access to a database of names and emails of potential respondents. Once the “participant table” has been uploaded to LimeSurvey, it exists as a separate table in addition to the response table of the survey. When downloading survey results, none of the information stored in the participant table will be available in the result table. However, survey administrators can associate participant information and responses at the level of the webinterface of LimeSurvey in case the “Settings > Participants settings > **Anonymized responses**” has been deactivated. In case “Anonymized responses” is “Off”, survey administrators can jump from the survey participant tracking to the actual response. In case “Anonymized responses” is “On” such linkage is deactivated.

Survey respondents can be either uploaded with a CSV file or created “on the fly” by allowing respondents to register their contact details before entering the first page of the questionnaire. Upon registering, the system will send out an invitation email containing the unique URL for their submission.

The advantage of creating a participant table is that personalized invitations and reminders can be sent out which usually **increments the overall response rate** to the survey substantially. Instructions on how to create a “participant table” can be found in the online manual:

[https://manual.limesurvey.org/Survey\\_participants](https://manual.limesurvey.org/Survey_participants)

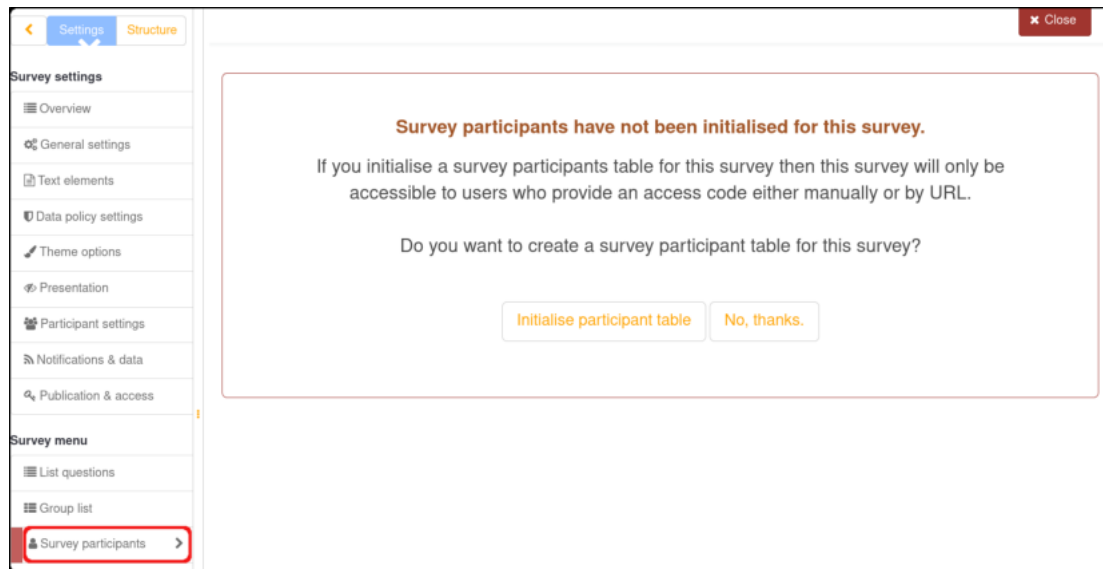
A unique identifier (token) is used to track the progress of a respondent’s submission. In case the browser crashes or the browser window is closed, respondents can come back to the survey and resume where they left off – even without explicitly saving their data manually with the

“Resume later” button. The data entered into the questions is stored as the user advances from one section to the next. Closing the browser window and re-entering the survey via the survey link will open the questionnaire on the last page (or section) visited.

Respondents can return and edit or delete their submission any time, even after their final submission. After a survey has been closed, respondents can request the deletion of their data by writing to the survey administrator. The email address from which the request is sent has to match the entry in the participant database.

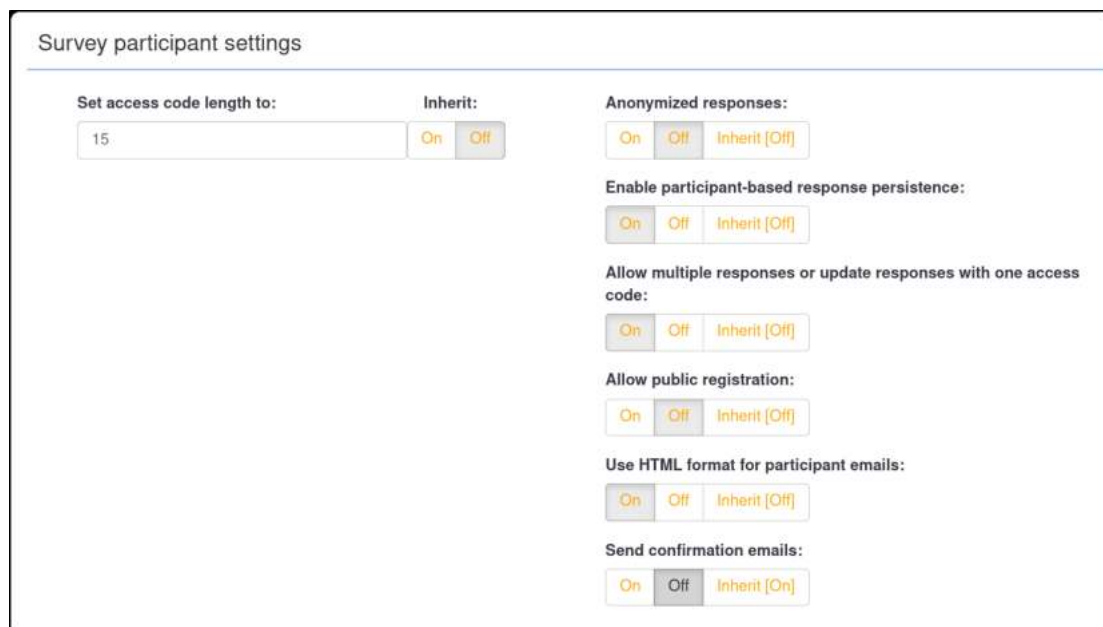
Use participant tables when contact details are available, response tracking is important and the questionnaire is rather long but does not contain privacy sensitive information.

In order to use the “comfort privacy” settings, first a “participant table” needs to be created.



Furthermore, you need to adjust the specified options within the corresponding sections as show below:

Click “Settings > **Participant settings**”:





Click “Settings > **Notification & data**”:

Notification and data management settings

<b>Date stamp:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Enable assessment mode:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]
<b>Save IP address:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Participant may save and resume later:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [On]
<b>Save referrer URL:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Send basic admin notification email to:</b> <input type="text"/> <b>Inherit:</b> <input type="radio"/> On <input type="radio"/> Off
<b>Save timings:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	<b>Send detailed admin notification email to:</b> <input type="text"/> <b>Inherit:</b> <input type="radio"/> On <input type="radio"/> Off
<b>Google Analytics settings:</b> <input type="radio"/> None <input type="radio"/> Use settings below <input type="radio"/> Use global settings	

Click “Settings > **Publication & access**”:

Publication & access control settings

<b>Start date/time:</b> <input type="text"/> 	<b>List survey publicly:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]
<b>Expiry date/time:</b> <input type="text"/> 	<b>Set cookie to prevent repeated participation:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]
<b>Use CAPTCHA for survey access:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	
<b>Use CAPTCHA for registration:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	
<b>Use CAPTCHA for save and load:</b> <input type="radio"/> On <input type="radio"/> Off <input type="radio"/> Inherit [Off]	

## 4.2 Explanation of individual settings

As a complement to the explanations already given in the LimeSurvey manual.

Participant settings:

- **Anonymized.** Concerns storage of meta-information with each survey entry. If turn “on”, this overwrites the submission start and completion dates with a generic time 1980-01-91 in order to avoid potential matching of server log entries with survey submission. In case a participant table has been created and “Anonymized” is off, survey administrators can jump from response tracking to the submitted data for each participant in the online LimeSurvey interface. If “Anonymized” is activated, this is not longer possible.
- **Enable token-based response persistence.** If enabled, concerns mainly an automatic

“interrupt and resume later” functionality. Tokens are used to store persistent data for an ongoing submission. In case a browser crashes or a browser window is accidentally closed, respondents can resume their submission where they left off. This persistence functionality works independent from the “anonymization” feature turned “on” or “off”.

- **Allow multiple responses or update responses with one token.** In case tokens are stored permanently in a participant database, respondents can access their submission data after it has been submitted. A personalized (token-based) URL has to exist in order for respondents to be able to access (and delete) their data after finalizing a submission. In order for this attribute to have any effect, a participant table needs to be created.

Publication & access

- **Set cookie to prevent repeated participation.** This feature works independently from the token-based persistence tracking. It is a good choice when “Anonymization” is activated and token-based persistence turned off. Respondents are then prevented from submitting their data twice. This might be a problem in case an interviewer needs to fill out several questionnaire for respondents from the same device.

## Chapter 5

# Launching A Survey

Launching the survey is relatively straight forward. It can either be activated by the “Activate this survey” button or through the “Publication and Access” settings which offers more fine tuned controls in terms of specifying start/end dates.

Corresponding section of the online manual: [https://manual.limesurvey.org/Publication\\_%26\\_access](https://manual.limesurvey.org/Publication_%26_access)

### Step 1: Set start / end dates

The screenshot shows the Limesurvey interface for setting survey parameters. On the left is a sidebar with a 'Survey settings' menu where 'Publication & access' is selected. The main area is titled 'Publication & access control settings'. At the top, a row of buttons includes 'Activate this survey' (highlighted with a red box), 'Preview survey', 'Tools', 'Survey participants', and 'Responses'. Below these, a 'Display/Export' button is visible. The 'Start date/time' and 'Expiry date/time' input fields are highlighted with a red box. To the right of these fields are several toggle sections: 'List survey publicly' (On selected), 'Set cookie to prevent repeated participation' (On selected), 'Use CAPTCHA for survey access' (Off selected), 'Use CAPTCHA for registration' (Off selected), and 'Use CAPTCHA for save and load' (Off selected).

Further settings:

**List survey publicly:** “Off”. Surveys can be listed under the following URL: <https://www.act-on-gender.eu/survey/> This is not recommended since you do not want to invite anonymous people (or robots) to submit data.

**CAPTCHA** Settings should all be set to “Off”. CAPTCHAS are used to prevent spamming and robots to access an active survey. CAPTCHAS are a good idea in case your survey is listed publicly or the access URL distributed through Twitter or other public forums. For the GEAM,

this should usually not be the case; invitation to participate should be restricted to private forums and channels, including direct email messages.

Note that no changes to the content are possible once a survey has been launched, except changes to the question text, help texts, or question group descriptions, essentially those elements of the questionnaire which do not affect the variable structure.

### Step 2: Revise privacy settings

As shown in the following screenshot, LimeSurvey also displays the summary of your privacy settings which cannot be changed after the launch. The privacy settings should reflect your choices as explained in section [Controlling data privacy and response tracking](#)

**Warning: Please read this carefully before proceeding!**

You should only activate a survey when you are absolutely certain that your survey setup is finished and will not need changing.

Once a survey is activated you can no longer:

- Add or delete groups
- Add or delete questions
- Add or delete subquestions or change their codes

**Additionally the following settings cannot be changed when the survey is active.**

Please check these settings now:

<b>Anonymized responses?</b>	<input type="text" value="No"/>	<b>Date stamp?</b>	<input type="text" value="No"/>
<b>Save IP address?</b>	<input type="text" value="No"/>	<b>Save referrer URL?</b>	<input type="text" value="No"/>
<b>Save timings?</b>	<input type="text" value="No"/>		

Please note that once responses have collected with this survey and you want to add or remove groups/questions or change one of the settings above, you will need to deactivate this survey, which will move all data that has already been entered into a separate archived table.

After clicking “Save & activate survey” LimeSurvey displays a notification message, informing about the successful creation of the result table which stores respondents data.

### Step 3: Participants Table

In a final step, LimeSurvey will also offers the option to switch to “closed access mode” and create a “participant table” to register survey respondents name and email.

You should choose “No, thanks” - assuming that you have read the section on [Controlling data privacy and response tracking](#) and do not want to create a participant table.

**Activate survey (119296)**

---

Survey has been activated. Results table has been successfully created.

This survey is now active, and responses can be recorded.

**Open-access mode:** No invitation code is needed to complete the survey.

You can switch to the closed-access mode by initialising a survey participants table by using the button below.

Switch to closed-access mode
No, thanks.

**URL address of survey** Your survey URL is available in the “Settings > Overview” section. You can copy/paste this URL address to distribute and invite survey respondents in case no participant table has been activated.

## 5.1 Tracking statistics

LimeSurvey can generate some simple descriptive statistics while your survey is active or after it has been deactivated.

Corresponding online manual section: <https://manual.limesurvey.org/Statistics>

## 5.2 Sending reminders

Most surveys requires several waves of reminders to be send. If your survey has been launched without a “participant table”, reminders need to be send via the available communication channels (email lists, private forums, etc.). Reminders under the “**strict**” or “**moderate**” security settings‘ can’t be personalized. Each wave of reminder will be send to all potential respondents, **irrespective if they have answered your survey already or not**.

In case a “participant table” is used, you can create **personalized wave of reminders** – with the advantage to reach only those potential respondents who have not replied so far. Personalized reminders via the LimeSurvey internal notification system increment the response rate of your survey notably.

Corresponding online manual section: [https://manual.limesurvey.org/Survey\\_participants#Invitations\\_.26\\_reminders](https://manual.limesurvey.org/Survey_participants#Invitations_.26_reminders)

## 5.3 Stopping, relaunching, finalizing survey

After a survey has been activated, you can manually “Stop this survey” at any time. In case an end date has been entered, the survey will expire automatically at the given deadline.

A survey can be “expired” or “deactivated”. Understanding the difference is crucial and has important implications for accessing result data!

**Expire a survey:** is synonymous to the end date of your survey. It simply will not be reachable for respondents.

Expire your survey, then download the results!

An expired survey can be relaunched, for example in case you decide to extend the deadline for submissions. Just enter a new end date.

**Deactivate a survey:** when deactivating a survey you will reset it into “editable” mode, i.e. all content, including questions and answer items can be modified, deleted or added. It resets and “empties” the survey into the pre-launch state.

**Always, always, always** download the results of your survey before it is deactivated!

A deactivated survey cannot be relaunched, or rather, this will create a brand-new response table. **All previous responses are lost!** Strictly speaking they are not lost, but you need to contact the system administrator to recover the data. In such a case, you need to remember the ID of your survey shown in parenthesis “Stop this survey (XXXXX)” in the next Illustration.

**Stop this survey(119296)**

Warning: Please read this carefully before proceeding!

There are two ways to stop a survey. Please read carefully about the two options below and choose the right one for you.

**Expiration**

- No responses are lost.
- No participant information lost.
- Ability to change of questions, groups and parameters is still limited.
- An expired survey is not accessible to participants (they only see a message that the survey has expired).
- It's still possible to perform statistics on responses using LimeSurvey.

Expire survey

**Deactivation**

- All responses are not accessible anymore with LimeSurvey. Your response table will be renamed to:  
lime\_old\_119296\_20191130071322
- All participant information is lost.
- A deactivated survey is not accessible to participants (only a message appears that they are not permitted to see this survey).
- All questions, groups and parameters are editable again.
- You should export your responses before deactivating.

Deactivate survey

## Chapter 6

# Accessing results

### 6.1 Monitoring progress

Several options are available to track responses while your survey is active. A first overview regarding the “Partial”, “Full”, “Total” responses is available from the survey listing after logging onto the system.

A more detailed view is available from the “Responses & Statistics” section.

Corresponding online manual section: <https://manual.limesurvey.org/Responses>

An overview of all variables (columns) is displayed (see next Illustration) with their corresponding data entries. Each row represents one respondent. The column “Lastpage” indicates the last visited page before the respondent left the survey.

Ordering the response table by “Lastpage” gives a quick overview of problematic sections/pages where many respondents “drop-out”.

‘In case you use a multi-language survey, the column “startlanguage” indicates which language version was used by the given respondent.

Survey responses

Display mode: **Extended** Compact

<input type="checkbox"/>	id	seed	lastpage	completed	startlanguage	startdate Date started	timestamp Date last action
<input type="checkbox"/>	30	1408427254	10	✓	es	05.11.2019 21:13:12	05.11.2019 2
<input type="checkbox"/>	31	2118923276	1	✗	es	05.11.2019 21:26:18	05.11.2019 2
<input type="checkbox"/>	33	1748385488	1	✗	es	05.11.2019 22:30:56	05.11.2019 2
<input type="checkbox"/>	34	638458459	1	✗	es	06.11.2019 00:13:02	06.11.2019 0
<input type="checkbox"/>	35	986065443	10	✓	es	06.11.2019 01:11:40	06.11.2019 0
<input type="checkbox"/>	36	2095964424	1	✗	es	06.11.2019 04:16:41	06.11.2019 0
<input type="checkbox"/>	37	2141727789	1	✗	es	06.11.2019 11:34:04	06.11.2019 1
<input type="checkbox"/>	38	1046964849	10	✓	es	06.11.2019 11:36:08	06.11.2019 1
<input type="checkbox"/>	39	1831065918	1	✗	es	06.11.2019 12:59:25	06.11.2019 1

## 6.2 Exporting questionnaire structure

The structure of your questionnaire including groups, questions, answers and conditions can be downloaded and stored as Survey Structure (\*.lss) file. In case you want to repeat your survey in the future, it will be easy to restore the identical questionnaire by importing the Survey Structure file in any compatible LimeSurvey installation. **The LSS file does not contain any responses.**

You can create a backup of your questionnaire under Display/Export > Survey structure (\*.lss) file. This will contain the text elements in all available languages of your GEAM instance.

## 6.3 Exporting survey results

Survey results can be downloaded (or exported) while a survey is active or after it has been “expired”. Be careful: **do not “deactivate”** your survey before downloading results, as your data will be lost!

You can export results under “**Responses > Responses & Statistics > Export > Export Responses**”.

Corresponding section online manual: [https://manual.limesurvey.org/Export\\_responses](https://manual.limesurvey.org/Export_responses)

Several export formats are available, including SPSS, R, CSV or Excel. In case you plan to analyze the results yourself without a professional statistical software such as SPSS your best choice is probably Microsoft Excel. In case you want to use the [reporting template](#) provided by the ACT project, you need to export the R syntax and R data file (see below).

### 6.3.1 Microsoft Excel

When exporting to Microsoft Excel file, make sure to select the following settings:

**Question Code & Question Text.** “Active”. Export both the question internal code as well as the plain text. Makes it easier to understand the data and responses without going back and forth to the code book of the questionnaire!

**Strip HTML code:** “On”. Removes HTML code in question texts and answer options.

**Export language:** In case your questionnaire was available in several languages, this option indicates in which language the answer options and question texts will be shown in the excel file. The text entered into open text boxes remains unaffected by this choice.

You can furthermore restrict the range of respondents and/or columns (variables) to be exported.

The screenshot shows the 'Export results' interface with two main panels: 'Format' and 'Headings'.

**Format Panel:**

- Export format:** Radio buttons for CSV, Microsoft Excel (selected), PDF, HTML, Microsoft Word, and R (syntax file).
- CSV field separator:** A dropdown menu set to 'Comma'.
- General Panel:**
  - Completion state:** A dropdown menu set to 'All responses'.
  - Export language:** A dropdown menu set to 'Spanish'.

**Headings Panel:**

- Export questions as:** A row of buttons: 'Question code', 'Abbreviated question text', 'Full question text', and 'Question code & question text' (highlighted).
- Strip HTML code:** A toggle switch set to 'On'.
- Convert spaces in question text to underscores:** A toggle switch set to 'Off'.
- Text abbreviated:** A toggle switch set to 'Off'.
- Use Expression Manager code:** A toggle switch set to 'Off'.
- Number of characters:** A text input field containing '15'.

Figure 6.1: Export survey results to MS Excel

### 6.3.2 R syntax and data files

In order to take full advantage of the entire workflow of the GEAM tool including the reporting template, the survey results need to be made available in R.

The LimeSurvey platform exports two relevant files, the “R Syntax file” and the “R data file”. While the data file is a simple CSV spreadsheet, the R Syntax file contains the labels and type specification for each variable (or spreadsheet column).

While these default steps for exporting to R work alright for questionnaires with just one language, the GEAM requires a slightly different export and pre-processing steps in case other than English reports are required.

In order to create a correctly labeled RData file in any language in which the survey was launched, carry out the following steps.

1. Download the GEAM [reporting template](#) from Github to your computer. It contains several files and folder, including for storing the “raw” data as well as the pre-processed, ready-to-use data file.

2. Export the Survey Structure file (\*.lss) and save it to the **data-raw/** folder inside the reporting template. Do not change the default file name provided by LimeSurvey.
3. Export the R data file “**Responses > Responses & Statistics > Export > Export Responses**” Save it to the **data-raw/** folder, do not change the file name.
  - Format: “R (data file)” with CSV field separator set to “Tab”.
  - Headings: select “Question Code”, Strip HTML code: “On”. Leave rest of options to default settings.
  - General: leave default settings.
  - Responses: select “Answer codes” (not visible in illustration below)

The screenshot displays the 'Export results' configuration page in LimeSurvey. It is divided into three main sections: Format, General, and Headings. In the Format section, 'R (data file)' is selected under 'Export format', and 'Tab' is chosen for the 'CSV field separator'. The General section shows 'All responses' for 'Completion state' and 'English' for 'Export language'. The Headings section shows 'Question code' selected for 'Export questions as', 'Strip HTML code' is turned 'On', and 'Convert spaces in question text to underscores' is turned 'Off'. Other options like 'Text abbreviated' and 'Use Expression Manager code' are also turned 'Off'.

Figure 6.2: Export survey results to R Data

4. Open RStudio with the reporting template files on view. Install the [LimeRLabel](#) package  
`devtools::install_github("jmueller17/LimeRLabel")`
5. Open `util/preprocess_lss.R` file from the reporting template in RStudio and assign your LimeSurvey ID to `lsid <- 123456`. If your survey uses another language than English adjust the `lsLangCode` variable accordingly (e.g. `lsLangCode <- "es"` for a Spanish Questionnaire).
6. “Source” the `util/preprocess_lss.R` file which will construct the correctly labelled R dataframe and save it into the **data/** folder of your reporting template file structure.

Basically, the pre-process file will read the Survey Structure file, extract the questions, sub-question items and response labels in the indicated language and merge it with the actual CSV data file to build a correct RData archive.

Each RData file contains all responses; however, you cannot switch between languages within the same RData file. You need one data file per language.

### 6.3.3 Export to SPSS

Exporting to SPSS involves two steps: exporting the data and the syntax file.

## Export response data to SPSS

**Data selection:**

All responses
Complete only
Incomplete only

**SPSS version:**

Prior to 16
16 or up

**Language:**

English

**Limit:**

**Offset:**

**No answer:**

**Step 1:**

Export syntax

**Step 2:**

Export data

The files need to be manually combined before importing them. Open the syntax file in SPSS and insert the name of the data file into the “FILE” field. Then run the import.

In case the labels for the variables in the SPSS file contain errors, a work-around consists of creating first the RData file and then exporting to SPSS from within R.

## 6.4 Deleting a survey (online)

After a survey is finished and the result data has been downloaded, we strongly recommend deleting the survey from the ACT LimeSurvey platform. In the unlikely event the survey platform is being compromised, there is no danger of exposing any respondent data. Please consider the following steps:

1. Export your survey result data if you haven't do so.
2. If you have used a “participant table” for distributing and reminding your respondents, export it as well. This will be important in order to comply with potential data deletion requests by individual respondent as stipulated by the GDPR policy.
3. Consider exporting and sharing your questionnaire structure – especially in case you have made considerable modifications. Your questionnaire might provide helpful for others working in similar institutional or regional/country context.
4. Delete your survey under Tools > Delete Survey.

Corresponding link to the online manual [https://manual.limesurvey.org/Delete\\_survey](https://manual.limesurvey.org/Delete_survey)

System administrators check regularly for expired surveys. In case a survey has not been deleted one month after its finalization, we will inform the survey administrator about the imminent deletion. If we do not hear back within two weeks time, the survey will be deleted.

## 6.5 Where to go from here?

Once the survey has been finished and results downloaded, the exploration of the data can start. Usually this involves to generate frequency tables and charts to visually inspect responses. During these initial explorations the results should be scrutinized in relation to the overall organizational context, highlighting similarities and differences with other data sources.

The [GEAM reporting template](#) can be used to generate a MS Word file containing the descriptive statistics including frequency tables and charts for each question.

Initial explorations on the descriptive level should then be followed up with more in-depth statistical analysis. The ACT handbook for statistical analysis of GEAM survey data will be available for further guidance.

# Annex I Survey Checklist

Key tasks to be completed before the launch of a GEAM survey:

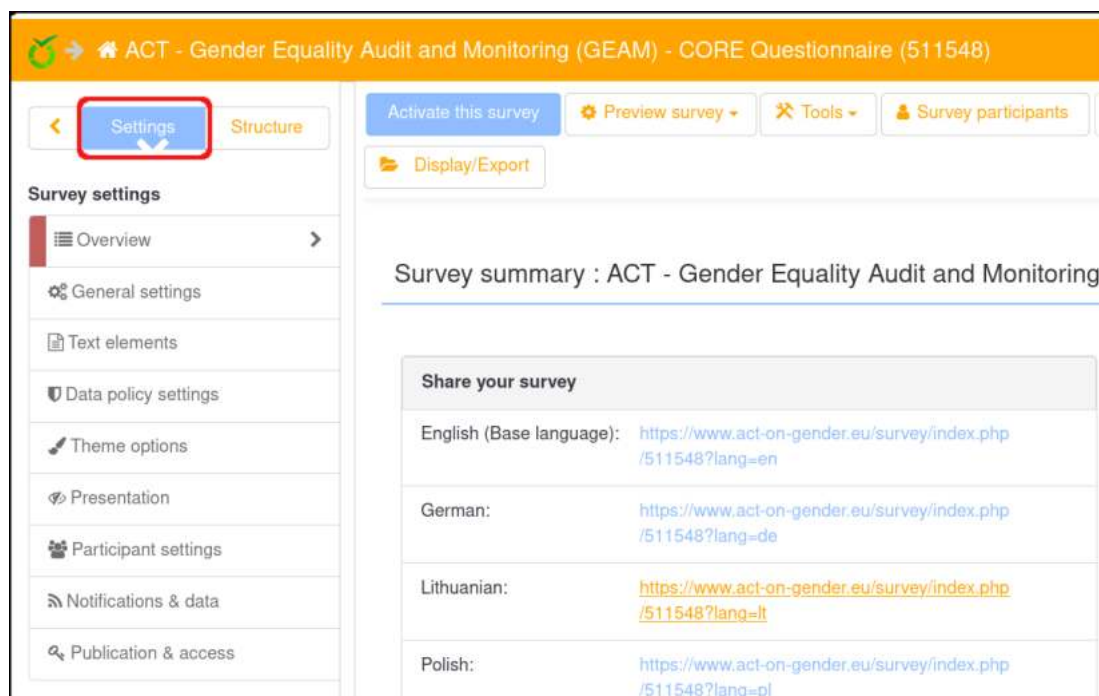
Status	Task
	<p>Provided a welcome and end message to your survey (Settings &gt; Text elements)</p> <p>Check that the title of the survey is correct. You can change the title of the survey under Text elements &gt; Survey title.</p> <p>Provided answer options for Question 4 on “Which best describes your post” (Structure &gt; WCJC004 &gt; Edit answer options). This question is by default empty!</p> <p>Selected the organizational reference category (Structure &gt; VarOrgType &gt; Edit default answer).</p> <p>Data Policy (Settings &gt; Data Policy): a) Revise and adapt all text elements marked in yellow, b) Provided name and email of the survey administrator, c) Selected one of the three available privacy settings and deleted the remaining two, d) Do this for all available languages</p> <p>Carefully read, fill out and sign the “Declaration of Data Protection and Confidentially Agreement”. Only after we receive a signed copy of the Data Protection statement will the ownership of the survey be transferred to the survey administrator, including the access rights to “activate” the survey.</p> <p>Provide or update your email address under Settings &gt; General settings &gt; “Admin email” and “Bounce email” if necessary</p> <p>If you have made any modifications to the content of the survey: check if these modifications are consistent across all active languages</p> <p>If you do not stick with the default “moderate” privacy settings you need to set the corresponding options for “strict” or “comfort” under “Settings &gt; Participant Settings” and “Settings &gt; Notifications &amp; data management”</p> <p>Deactivate the display of question codes under Display &gt; ???. Questions will be numbered automatically in order of appearance</p> <p>Once your survey has finished, be sure to download all data before “deactivating” the survey.</p>

# Annex II Basics of LimeSurvey Interface

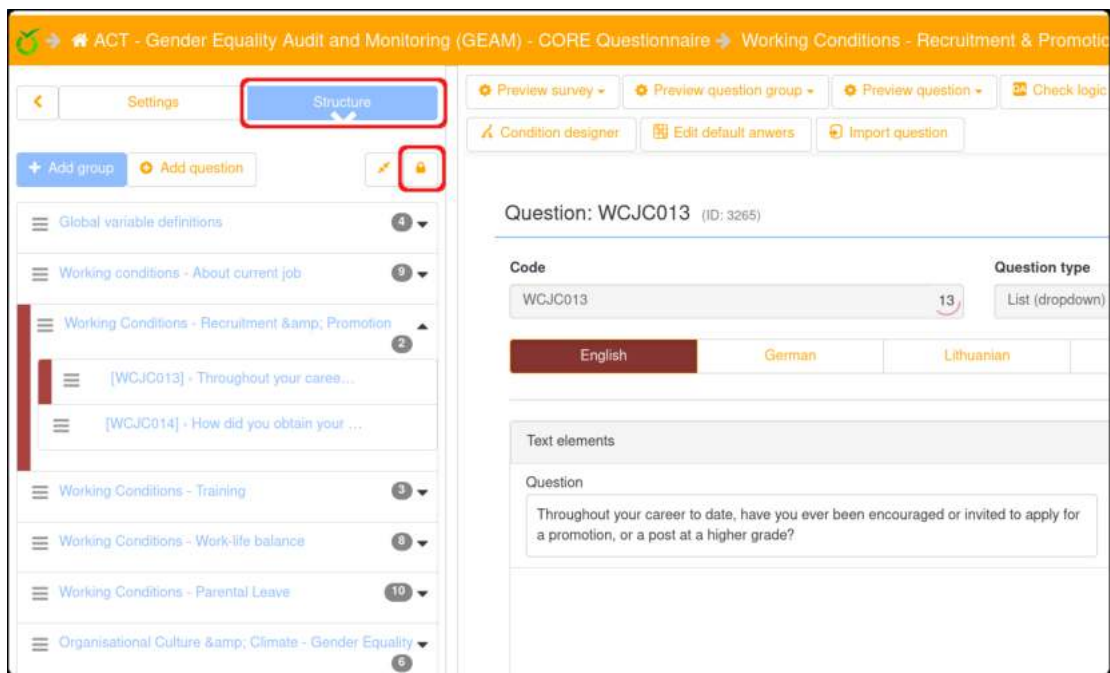
## Basic structure of the interface

For a quick start regarding the LimeSurvey platform and GEAM Questionnaire, you can watch the video [GEAM First Steps](#)

Global features of the questionnaire such as its title or welcome message are controlled via “Settings” while individual question content can be edited via the “Structure” panel.



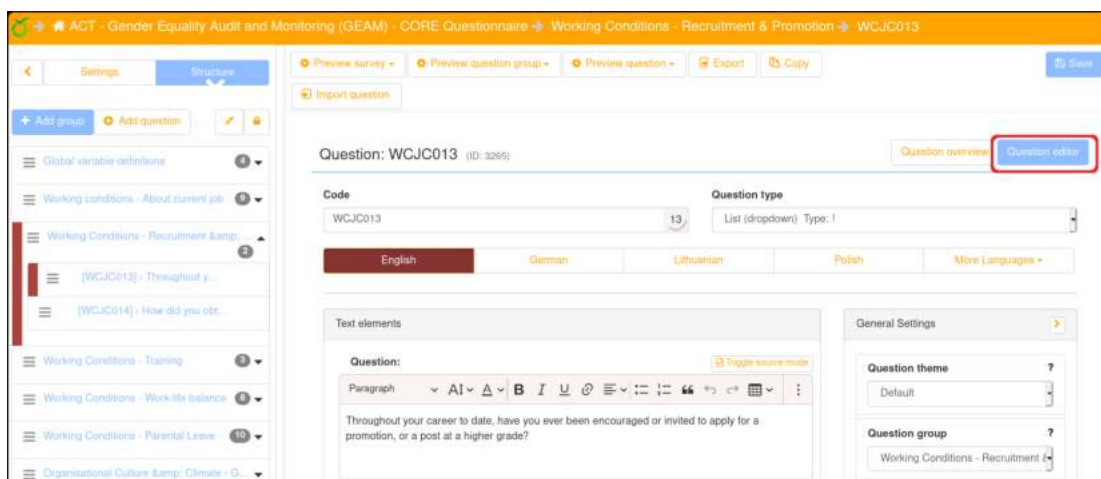
Individual questions can be edited under the “Structure” view:



Note the “locked” symbol in the illustration above. Changing the order of questions or question groups requires to “unlock” the left column.

## “Question Editor” versus “Question Overview”

When clicking a specific question in the left “Structure” column, it becomes editable in the main view. By default, the “Question Editor” View becomes active to change question text or answer options.



In contrast, the “Question Overview” provides access to the setting “conditional logics”, “default answers”, “export options” or for “deleting” the question. Note the change in the top button rows in the illustration below.

The screenshot displays the ACT Gender Equality Audit and Monitoring (GEAM) interface. The top navigation bar shows the path: ACT > Gender Equality Audit and Monitoring (GEAM) > CORE Questionnaire > Working Conditions > Recruitment & Promotion > WCJC013. The left sidebar contains a tree view with categories like 'Global variable definitions', 'Working conditions - About current job', 'Working Conditions - Recruitment & Promotion', 'Working Conditions - Training', 'Working Conditions - Work-life balance', 'Working Conditions - Parental Leave', and 'Organisational Culture & Climate'. The main content area is titled 'Question: WCJC013 (ID: 3265)'. It features a 'Text elements' section with the question text: 'Throughout your career to date, have you ever been encouraged or invited to apply for a promotion, or a post at a higher grade?'. The 'General Settings' section includes 'Question theme' (Default) and 'Question group' (Working Conditions - Recruitment & Promotion). A red box highlights the top toolbar with buttons: 'Preview survey', 'Preview question group', 'Preview question', 'Check logs', 'Delete', 'Export', 'Copy', 'Condition designer', 'Edit default answers', and 'Import question'. Another red box highlights the 'Question overview' and 'Question editor' buttons.

# Annex III Declaration of Data Protection

Please download and fill out the following declaration of data protection and confidentiality agreement for survey administrators and return to [info@act-on-gender.eu](mailto:info@act-on-gender.eu)

Download declaration in [PDF](#), [MS Word](#), or [LibreOffice](#) formats.

Upon reception, the survey administrators can launch the survey.

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