

Approach to the evaluation planning in Portugal

2023 Evaluation Helpdesk Summer School
Madrid

6-7 July 2023

Institutional setting of the PT 2030 Evaluation Plan

❖ Monitoring and Evaluation Network

- **Cohesion and Development Agency - AD&C** (coordination)

Is the body responsible for the technical coordination of the Cohesion Policy Funds

- **Managing Authorities**

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- **PlanAPP**

Competence Centre for Planning, Policy and Foresight in Public Administration

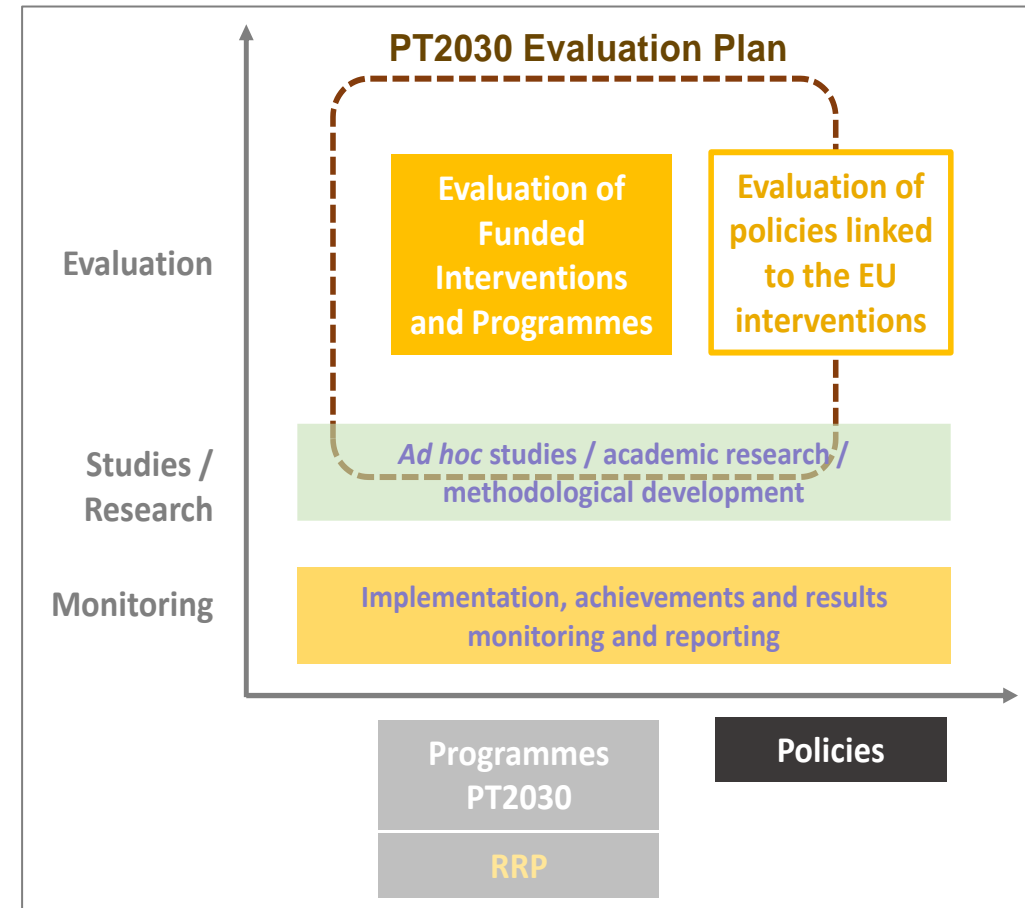
- **GPEARI**

Ministry of Finance Office for Planning, Strategy, Evaluation and International Relations

- **Recovery and Resilience Plan** managing body

❖ Interministerial Coordination Commission – CIC PT2030

Political coordination of PT2030 (approval of the Evaluation Plan)



Overall Strategy (excluding other relevant dimensions, such as budgeting, planning for adaptation, quality assurance, communication and use of findings, capacity building)

1. Building upon existing knowledge:

❖ Synthesis Report on Evaluation findings of Portugal 2020 **1** **2**

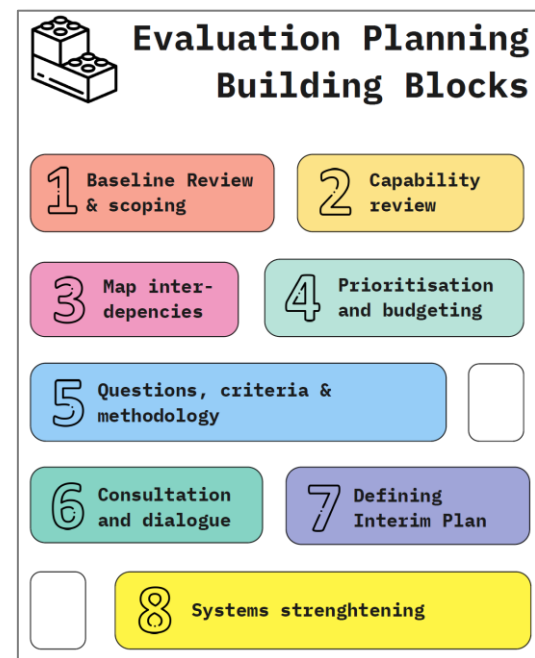
❖ Evaluability Studies of main public policies funded by PT2030 **1** **3** **4** **5** **6**

❖ Studies on Methodologies for Evaluating Public Policies **5** **8**

❖ *Ex Ante* Evaluations of Portugal 2030 Programmes **1** **3**

2. Consultation and dialogue with partners and stakeholders **6** **8** **7**

3. Scoping, prioritisation and tentative timetable **4** **7**





1. Build upon existing knowledge - “Evaluability” studies

Evaluability Studies on 4 (four) key thematic areas of the previous and current programming period – **Research and Innovation, Education and Training, Climate Action, Employment and Social Inclusion**

Main tasks of the Evaluability Studies:

A. Reviewing/drafting ToC – through an **extensive literature review** (including previous evaluations), **stakeholders’ consultation** (focus groups), and **preliminary validation against available secondary information**

1 3

B. Identification of evaluation needs – **knowledge gaps** highlighted in the previous step (namely literature review and stakeholders’ consultation) signal **where evaluation efforts should be concentrated** – they may be either **implementation or impact evaluations**

4 5 6

C. Identification of the most appropriate designs and methods (namely CIE and TBE for impact evaluations) and **data requirements** – including ways to strengthen the monitoring systems – to **address the evaluation needs** identified in the previous step

5

2. Consultation and dialogue with partners and stakeholders

- ❖ **Setting up the institutional framework for the Evaluation Plan** 8
 - ✓ Monitoring & Evaluation Network (M&E Network)

- ❖ **Contributions from partners and stakeholders** 6
 - ✓ Discussion and agreement on the **overall strategy and principles of the Evaluation Plan**
 - ✓ *Feedback from Helpdesk*
 - ✓ Request for **contributions from partners and stakeholders regarding specific evaluation needs and priorities** 7 8

- ❖ **Iterative process – it’s a “dialogue”**
 - ✓ Contributions from partners and stakeholders are used to **map the evaluation needs and priorities**
 - ✓ Check for **overlaps**, agree on **cross-cutting themes** and identify **areas where more focused approaches are needed**
 - ✓ Discuss **timing and intended uses** – when the evaluations are needed/feasible
 - ✓ A **tentative list of evaluations** is prepared and **discussed within the M&E Network** - iterative process

- ❖ **Inputs from the **Evaluability Studies** are reflected as they are made available** (still an ongoing process)

3. Scoping, prioritization and tentative timetable

❖ Scope - Main policy areas and policy instruments to be evaluated

4

- Cross-cutting themes, interdependencies and systemic interactions between policy instruments (within PT2030 and in combination with RRP)
- Thematic, policy area, policy instruments or territorial-based priorities where a focused approach is needed

❖ Priorities and purpose

4

7

- According to **policy relevance** (financial allocation, expected outcomes, stakeholders' needs, innovativeness of interventions), **knowledge gaps and main questions (and evaluation criteria)**, **existing capacity (internal and external)**, **data availability** and **evaluation intended uses**
- in turn, that inform the nature of the evaluations: **Implementation Evaluation** or **Impact Evaluation**

❖ Provisional list and timetable

7

According to **scope and priorities**:

- **Ex post Impact Evaluations** covering PT2020 interventions (that are similar or carried throughout PT2030)
- **Implementation Evaluations** and small-scale **studies** (such as revising diagnostics, target groups' characterisation, improving methodological tools)
- **PT2030 Impact Evaluations**

Programming
Period



Thank you!

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