

Evaluation Design and Planning: Introductory Remarks

Purposes, Activities and Preconditions

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Knowing *what* to do is not the same as knowing *how* to do it!

- Usually the problem is not ‘knowledge’ – the ‘what should be done’ of both designing *Ex Post evaluation* and preparing an *Evaluation Plan* is summarised in the Regulations and in Guidance issued by the CE
- We are interested in reasons that make implementation difficult
- When not all the *preconditions* for implementing design and planning are in place
- This accounts for most of the barriers and difficulties that MAs face

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In these two days we want to focus on *how* to make design & planning *practical* and *useful* as much as discussing *what to do*



First by sharing ways *you* have found that work – which is why a lot of time will be spent in groups in order to exchange experience



Second we will be drawing on Helpdesk and wider evaluation experience



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- A basic 'framework' : there will be barriers to design and planning if certain preconditions are not in place

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<i>Evaluation Plan – Purposes include</i>	<i>Ex post design – Purposes include</i>
<ul style="list-style-type: none">• Delineate the scope of the plan, what is to be covered• Integrate the priorities of EU, national and territorial stakeholders into the Programme• Ensure that ‘horizontal’ principles are integrated, e.g. gender equality; energy efficiency; climate change adaptation	<ul style="list-style-type: none">• Judge effectiveness, efficiency, coherence, and EU value-added across the entire programming period• Learn how to implement programmes more effectively and efficiently in future• Contribute to future programmes and policies

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<i>Evaluation Plan – Activities</i>	<i>Ex post evaluation Design - Activities</i>
<ul style="list-style-type: none">● Set objective at strategic and programme level – balancing themes and coverage● Identify a provisional list of required evaluations – including preparatory studies - to be kept under review● Specify broad methodological approach including unit of analysis	<ul style="list-style-type: none">● Incorporate lessons from previous programming periods and take into account 2021-2027 priorities● Decide whether preparatory studies are needed and what should be included in inception report● Track progress made towards long-term outcomes and results

We also expect to discuss barriers & preconditions, such as:

- Effective coordination arrangements in and between MAs
- Data availability when it is needed
- Engagement & dialogue with stakeholders, partners and beneficiaries
- Procurement and contracting that is fit-for-purpose i.e. adapted to evaluation market

- The challenge is to reconcile activities and purposes in a way that identifies and overcomes barriers



Evaluation Design & Planning

Underpinning both design and planning are the essentials of evaluation content:

Identifying the important questions we want answers to

Building a 'theory' that explains and connects interventions and intended results

Having methodological capability

Taking stakeholders, partners, users and beneficiaries seriously and involving them

..... to ensure evaluations are useful and used

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Turning back to the agenda.....