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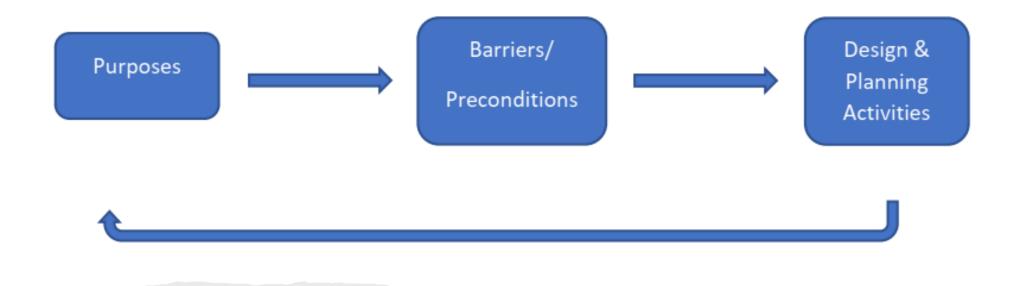
In these two days we want to focus on *how* to make design & planning *practical* and *useful* as much as discussing *what to do* 



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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Evaluation Plan – Purposes	Ex post design – Purposes
include	include
<ul> <li>Delineate the scope of the plan, what is to be covered</li> <li>Integrate the priorities of EU, national and territorial stakeholders into the Programme</li> <li>Ensure that 'horizontal' principles are integrated, e.g. gender equality; energy efficiency; climate change adaptation</li> </ul>	<ul> <li>Judge effectiveness, efficiency, coherence, and EU value-added across the entire programming period</li> <li>Learn how to implement programmes more effectively and efficiently in future</li> <li>Contribute to future programmes and policies</li> </ul>

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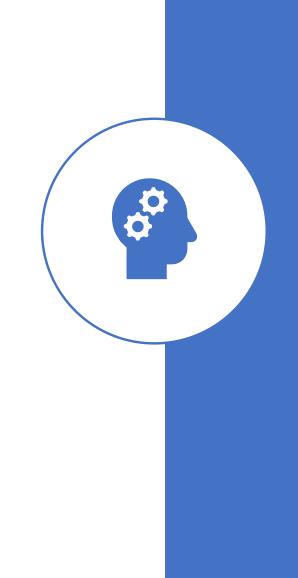
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Evaluation Plan – Activities	Ex post evaluation Design - Activities	
<ul> <li>Set objective at strategic and programme level – balancing themes and coverage</li> <li>Identify a provisional list of required evaluations – including preparatory studies - to be kept under review</li> <li>Specify broad methodological approach including unit of analysis</li> </ul>	<ul> <li>Incorporate lessons from previous programming periods and take into account 2021-2027 priorities</li> <li>Decide whether preparatory studies are needed and what should be included in inception report</li> <li>Track progress made towards long-term outcomes and results</li> </ul>	

# 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.....