

Evaluation and Monitoring Essentials for Structural Funds in 2014-2020*

Maastricht (NL), 22 October 2014

and

Evaluation and Monitoring of EU Structural Funds Programmes 2014-2020

Maastricht (NL), 23-24 October 2014



European Institute of Public Administration
Institut européen d'administration publique

Introduction

Target group

Officials from central, regional and local government, programme officers and managers, as well as project managers and developers involved with the implementation of Structural Funds projects and programmes in either 2007-2013 or 2014-2020. The seminar is also open to economic and social partners involved in the Structural Funds process, such as NGOs, higher education establishments, and consultants.

Description

This two-stage seminar consists of illustrated presentations, group discussions and workshops.

Stage 1 (Day 1) will deal with the essentials: the Evaluation Cycle, evaluation terminology and basic monitoring tasks, as well as looking at the basic methods used for conducting ex ante programme evaluations, evaluations during the programming period and ex post impact assessments of projects and programmes. It will consider the subject of quantifying programmes by generating indicators for projects and programmes. There will be exercises with indicators, priority-setting, result indicators and employment creation.

Stage 2 (Days 2 and 3) assumes that participants have the background knowledge of methods and concepts covered in Stage 1. There will be a recap of the essentials and a look at the Europe 2020 context for programming and evaluation activity. Keynote speeches will be delivered by the European Commission and expert consultants in the field. The European Commission will describe its new monitoring and evaluation conceptual framework, and what it sees as the particular challenges for Member States in the current and the next programming period.

Other areas of focus will be on:

- favoured best practice techniques in evaluation, including theory-based and counterfactual evaluations;
- key issues for ex ante, ongoing and ex post evaluations;
- the practical application of technical concepts;
- ex ante project appraisal techniques (with a basic introduction to cost-benefit analysis).

We will discuss the question of measuring job creation for ESF and ERDF/Cohesion Fund, and the difference between gross jobs and net jobs, deadweight, displacement, and multipliers. There will also be an exercise on using benchmarks for setting targets and financial allocations for the performance framework.

Learning methodology

There will be a series of presentations from regional practitioners, expert consultants and EC officials. Discussions and exchanges of experience are encouraged. Mini-workshops and exercises are used both to develop simulations of essential elements of evaluation and monitoring, and to provide a clear view of good practice in the key disciplines involved.

Objectives

At the end of the seminar the participants should have a clear understanding of all the basic evaluation and monitoring requirements associated with EU cohesion policy. Participants should also have a quick general tool kit for undertaking programme and project appraisal, theory-based and counterfactual evaluations and the process of generating indicators and measuring performance.

*22 October 2014: The first stage is optional. It covers the basics of evaluation and monitoring, including the Evaluation Cycle, key evaluation methods and concepts, and the use of indicators for quantifying programmes. Please note that this first day will only take place if there is sufficient demand.

Programme

WEDNESDAY 22 OCTOBER 2014

*Optional day: stage 1 seminar begins

Evaluation and Monitoring Essentials for Structural Funds in 2014-2020: Methods, Concepts and Indicators for Projects and Programmes

- 09.00 **Registration of three-day participants**
- 09.15 **Opening of the seminar: introduction to the objectives and methodology of the seminar**
Marco Lopriore, Senior Lecturer, EIPA, Maastricht (NL)
- 09.30 **Introduction to the Evaluation Cycle, monitoring and indicators**
- Wealth creation, value for money and the policy-evaluation cycle
 - Ex ante evaluations, evaluations during the programming period, ex post evaluations
 - Quantifying projects and programmes – generating output and result indicators
 - Exercise with indicators
- Robin Smail, Consultant and Visiting Expert EIPA (UK) (former National Expert EC)*
- 11.00 Coffee break
- 11.30 **Europe 2020, ex ante programme evaluation, setting budgets and targets**
- Europe 2020 and the structure of new programmes
 - The new conceptual framework for evaluation and monitoring in 2014-2020
 - Exercise to determine programme priorities
 - Ex ante evaluation of programmes 2014-2020
 - Using benchmarks for setting budgets and targets
- Robin Smail*
- 13.00 Lunch at Hotel Derlon
- 14.30 **Workshop: Specific objectives and result indicators**
Robin Smail
- 15.15 Coffee break
- 15.45 **Monitoring tasks and an introduction to methods used for evaluations during the programming period and ex post Impact Assessments of projects (and programmes)**
- Key monitoring tasks
 - Evaluations – measuring effects and impacts, understanding causality
 - Doing the desk research, the fieldwork, the analyses
 - Building the counterfactual or policy-off scenario
 - Exercise on calculating gross and net job creation
- Robin Smail*

18.45 Buffet dinner at Hotel Derlon

THURSDAY 23 OCTOBER 2014

Two-day seminar: stage 2 seminar begins

Evaluation and Monitoring of EU Structural Funds Programmes 2014-2020

- 08.45 **Registration of two-day participants**
- 09.00 **Welcome and introduction to the objectives and methodology of the seminar**
Marco Lopriore, Senior Lecturer, EIPA, Maastricht (NL)
- 09.10 **Review of the new European Commission framework for evaluation and monitoring and key evaluation concepts for 2014-2020**
- Europe 2020 and the new programme priorities
 - The evaluation cycle and methods for evaluation
 - Monitoring versus evaluation, essential concepts
 - Quantification of programmes, the performance framework
- Robin Smail, Consultant and Visiting Expert EIPA (UK) (former National Expert DG Regio)*
- 10.15 **Exercise: Using benchmarks to set targets and budgets – 2014-2020**
Robin Smail
- 11.00 Coffee break
- 11.30 **Evaluation methods, issues and technical concepts**
- Objectives and scope of evaluations
 - Theory-based and counterfactual evaluations
 - Key issues for ex ante, ongoing and ex post evaluations
 - Assessing quantitative performance
 - Assessing processes
 - Engaging stakeholders and beneficiaries
- Dr Iain Jenkins, Director, EKOS Consultants, Glasgow (UK)*
- 13.00 Lunch at Hotel Derlon
- 14.30 **Monitoring and evaluation of the ESIF 2014-2020: a view from the European Commission**
- The new conceptual framework for monitoring and evaluation for 2014-2020 – result orientation
 - The evaluation plan
 - Theory-based and counterfactual evaluations
- Daniele Vidoni, Evaluation Unit, DG Regional and Urban Policy, European Commission, Brussels (BE)*
- 16.00 Coffee break

Programme

- 16.30 **Workshop: The practical application of technical concepts in evaluation**
- Logic models and theory of change
 - Testing the project's strategic and market failure rationales
 - Attribution, deadweight, displacement
 - Exercises calculating effects and impacts
- Dr Iain Jenkins*
- 18.15 **Close of second day**
- 18.30 Reception at Hotel Derlon

FRIDAY 24 OCTOBER 2014

- 09.15 **Ex ante project appraisal techniques, major projects, revenue-generating projects**
- Project rationale, market failure, theory of change
 - Feasibility, options, risk assessment, sensitivity analysis
 - Financial and economic appraisal: calculating the costs, the benefits and the rates of return
 - Major project application forms
 - Calculating the grant for revenue-generating projects
- Robin Smail*
- 10.45 Coffee break
- 11.15 **Conducting thematic evaluations in 2014-2020: evaluation plans, preparing for studies, managing studies, using the results**
- Project evaluation plans
 - Preparing for studies
 - Structuring and managing evaluations
 - Common issues for evaluations
- Dr Iain Jenkins*
- 12.45 **Introduction to workshop on ex ante project appraisal**
- 13.15 Lunch at Hotel Derlon
- 14.30 **Workshop completion and feedback**
- 16.00 **Seminar feedback and conclusion of the seminar**
- 16.15 **Close of seminar**



General Information

Programme

The programme will commence with a First stage seminar* on Wednesday morning 22 October 2014 at 9.00 hrs. The main Seminar (Stage 2) will commence on Thursday morning 23 October 2014 at 9.00 hrs and will finish on Friday 24 October at 16.15 hrs.

Seminar venue

The seminar will take place at the European Institute of Public Administration, O.L. Vrouweplein 22, NL-6211 HE Maastricht, tel.: +31 43 32 96 222, fax: +31 43 32 96 296.

Working language

The seminar will be conducted in English.

Fee

The participation fee for the 3-day programme (Stage 1 and 2 Seminar) will be €1350 and includes participation in the seminar, documentation, three lunches, two receptions and refreshments. The participation fee for the 2-day programme (Stage 2 Seminar) will be €950 and includes participation in the seminar, documentation, two lunches, one reception and refreshments. Accommodation and travel costs are at the expense of the participants or their administration.

EIPA offers its members a reduction of 10% off the registration fee. This reduction is available to all civil servants working for one of EIPA's member countries (i.e. AT, BE, BG, CY, CZ, DK, EE, FI, FR, DE, GR, HU, IE, IT, LT, LU, MT, NL, PL, PT, ES, SE, UK) and civil servants working for an EU institution, body or agency. Officials of the EU institutions, bodies or agencies should enquire about applicable arrangements on the following website: <http://lot6.eipa.eu>. If you are eligible for a discount, please tick the box in the registration form. Please note that reductions cannot be accumulated. For more information, please visit EIPA's website: <http://seminars.eipa.eu> (FAQ - special discounts).

Hotel reservations

The European Institute of Public Administration has special price arrangements with a number of hotels. All hotels are within 10 minutes walking distance from EIPA.

Should you wish to make use of this possibility, please book directly via the links below. Payment is to be made directly and personally to the hotel on checking out. At the time of booking, please mention in the requested field the EIPA project number **1430207**.

- **Bastion Hotel**
www.bastionhotels.nl/en/eipa.html
- **Townhouse Hotel**
www.townhousehotels.nl/eipa
- **Hotel Derlon**
www.derlon.com/business/eipa-goes-derlon
- **Designhotel Maastricht – Hampshire Eden**
www.hampshire-hotels.com/eipa

Meals

The lunches will be served at Restaurant Derlon, O.L. Vrouweplein 6 in Maastricht. The receptions on Wednesday and Thursday evening 22 and 23 October will also be held at Restaurant Derlon. Should you require a special menu (e.g. vegetarian, diabetic), please inform the Programme Organiser so that this can be arranged.

Registration

Kindly complete the registration form and return it before 6 October 2014 to Ms Winny Curfs, Programme Organiser, European Institute of Public Administration, P.O. Box 1229, NL-6201 BE Maastricht, tel.: +31 43 32 96 320, fax: +31 43 32 96 296, e-mail: w.curfs@eipa.eu.

You can also submit the online registration form which can be found on EIPA's website <http://seminars.eipa.eu>

Your name and address will be part of EIPA's database for our mailing purpose only. If you do not want to be included in our mailing database, please tick the box on the registration form.

Confirmation

Confirmation of registration will be forwarded to participants on receipt of the completed registration form.

Payment

Prior payment is a condition for participation. Please indicate the method of payment on the registration form. For cancellations received after the date indicated on the registration form we will have to charge an administration fee of €150 unless a replacement participant is found.

Cancellation policy

EIPA reserves the right to cancel the seminar up to two weeks before the starting date. EIPA accepts no responsibility for any costs incurred (travel, hotel, etc.). For EIPA's cancellation policy, please visit our website <http://seminars.eipa.eu> (FAQ - legal notice).

Registration Form

Evaluation and Monitoring Essentials for Structural Funds in 2014-2020*
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Surname: Title: M/F
First name:
Organisation:
Department: Current position:
Work address:
Postal code & Town: Country:
Telephone number: Fax number:
E-mail address:

Invoice information

Organisation:
Department:
Address:
Postal code & Town: Country:
VAT number: Your reference number:
E-mail address:

Payment - 1430207

- 22-24 October 2014, Maastricht **€1350**
 23-24 October 2014, Maastricht **€ 950**

The fee includes participation in the seminar, documentation, lunches, reception(s) and beverages

- Discount of 10% (Please check first the conditions at <http://seminars.eipa.eu> (FAQ - special discounts))

Method of payment

- Bank transfer

- Credit card

- American Express card Eurocard/Mastercard Visa card

Card number: Expiry date: /

Name card holder: (in case this differs from above)

Address card holder: (in case this differs from above)

Postal code: Country: (in case this differs from above)

Card Validation Code: (the last three digits on the back of your card)

Exempt from VAT by virtue of Article 11, Para. 1 (o), Sub-para. 2 of the Dutch Law on VAT of 1968

Meals

- Vegetarian → Fish allowed → Other dietary requirement:

Please return the completed registration form before 6 October 2014 to:

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Your name and address will be part of EIPA's database for our mailing purpose only.
Please tick if you do not want to be included in our mailing database.