

Slovenian Evaluation Society & Croatian Evaluation Network (The Institute of Economics, Zagreb) & Croatian Section of the European Regional Science Association are organizing the

## 3<sup>rd</sup> Regional Training for Evaluators in WB & SEE

October 23–24, 2017, as a preconference event to the 2<sup>nd</sup> WBEN Conference in Zagreb, Croatia

### I. DESCRIPTION OF THE TRAINING

Evaluation is one of **policy cycle's integral phases** (besides programming and implementation), responsible for producing clear and constructive feedback to decision makers on the impact of their actions – ex-ante, mid-term or ex-post. Evaluation of policies, programs and/or projects (PPP) is based on hard evidence but also on soft sources, which account for different valuation of observed impacts between different stakeholders. **Neutral evaluation** requires careful handling of often inconsistent pieces of information. For this purpose various specialized evaluation methods and tools are available – both qualitative and quantitative, such as analysis of data, literature review, survey, interviews, and triangulation of findings.

However, our **experiences from evaluation in the Southeast European region** suggest that technical knowledge is just one important precondition for good evaluation. The other, and sometimes even more important, is the evaluator's ability to work with a specific set of regional constraints, such as lack of data, that make very technical evaluation tools less useful but increase the importance of cultural understanding of evaluation, inter-cultural context, or working in conditions of evaluation anxiety. Evaluators in the region need to be more creative in overcoming barriers to evaluation that are not known in countries from which best technical knowledge is obtained.

This training has **regional character in three ways**: specific program design with many case studies from the region, and interactive work of participants; regional trainers with international experiences; the program is recognized as relevant by the regional network of evaluators themselves (Western Balkan Evaluation Network - WBEN). This program is unique in the WB region.

This training differs from many others due to its emphasis on the newest, fifth generation (or fourth wave) of evaluation (Guba-Lincoln; Vedung). It deals with **novel challenges in the EU and evaluation** of policy synergies related to sustainable development, cohesion, smart growth, horizontal impacts, etc. These are called for in impact evaluation of cohesion policy and in particular in the new instruments of EU Structural and Investment Funds: CLLD - Community Led Local Development; ITI – Integrated Territorial Investment (for territorial investment in cities and regions); Smart growth (& specialization), but also in evaluation of gender equality, cultural heritage protection, international development assistance, innovation and many other PPPs **with strong horizontal (intersectoral) dimension**.

**The purpose** of this training is to enhance practical evaluation skills of evaluators from the SEE region. The training's **goal** is to transfer specific knowledge, skills and tools to evaluators in the SEE region in a very pragmatic way that is based on previously gained experiences. The training will improve the capacity of participants to engage in evaluation studies on the level of leading evaluators who can independently plan and accomplish evaluation tasks. Participants will receive a **Certificate** at the end of the training with a description of newly obtained knowledge and skills.

### II. TRAINING METHODS

The **training combines various methods** of work with the aim to offer a dynamic approach. The program starts with introductory lectures, and continues with presentation of cases, discussions of participants, and group work, including social events for less formal exchange and networking. Special emphasis is devoted to an **interactive approach** to training where participants have an active

role in shaping parts of the program and especially in testing newly obtained knowledge on concrete examples, together with their peers.

Participants will receive a copy of slides including an overview of recommended literature for autonomous work and independent study after the training. After its completion, participants will have the opportunity to get involved in the regional Evaluation Forum (LinkedIn) which operates as a peer-to-peer support network for regional evaluators, including dissemination of relevant information and partner search.

### III. PROGRAM

DAY 1		
Time	Theme	Trainer
09:00-09:45	<b>Opening and introduction</b> <i>Description: Greetings, introduction of participants and trainers, structure of the program, its goals, contents and expectations, work methods</i>	Marijana Sumpor & Bojan Radej
09:45-10:30	<b>Evaluation in the overlap between knowledge and values</b> <i>Description: Evaluation is not a science but an instrument of governing public goods. Truth vs. justice vs. public good. Bentham's maximisation imperative. Commensurable vs incommensurable values. Arrow's Theorem of impossibility. Concept of social complexity (synthesis micro-macro, setting priorities, coordination of group interests). Neutrality of evaluation.</i>	Bojan Radej
10:30-11:00	Coffee break	
11:00-11:45	<b>Introduction to evaluation</b> <i>Description: Purpose, goals and results of evaluation, expected benefits for decision-makers. Life-cycle of policies, programs and projects (PPPs). Log-frame. Review of "Discussions on different approaches to evaluation"</i>	Marijana Sumpor
11:45-12:30	<b>PPP's Theory of Change (Intervention Logic)</b> <i>Description: Present poor consistency of PPP's strategic and action level. Do evaluated actions translate logically consistently into PPP's results? How to evaluate intervention logic? Alternative theories of change. New theory of change in the EU: "smart growth".</i>	Bojan Radej
12:30-13:30	Lunch (catering)	
13:30-14:15	<b>Management of evaluation process &amp; dissemination of results</b> <i>Description: Setting evaluation questions and criteria. Specifying resources for implementation phase. Outline of the study. Management of evaluation process. Dissemination of evaluation results.</i>	Marijana Sumpor
14:15-15:00	<b>Evaluation criteria in project assessments – intro</b> <i>Description: Introduction to project evaluation, presentation of assessment sheets and evaluation criteria; presentation of concept note i.e. brief project descriptions; working group orientation – participants assess examples of project proposals.</i>	Irena Đokić
15:00-15:15	Coffee break	
15:15-16:00	<b>Evaluation criteria project assessments – group work</b> <i>Description: Participants assess examples of project proposals. Note: Concept notes are distributed in advance to participants.</i>	Irena Đokić/ Marijana Sumpor & Bojan Radej
16:00-16:45	<b>Evaluation criteria in project assessments – presentation</b> <i>Description: Working groups present results from group work; discussion and comments from trainers and participants.</i>	Irena Đokić/ Marijana Sumpor & Bojan Radej
17:00-19:00	<b>Social activities – city walk and drinks</b>	Trainers & participants
DAY 2		

Time	Theme	Trainer
09:00-09:45	<b>Types and models of program evaluation methods</b> <i>Description: Introduction to surveys, case studies, cost-benefit studies, Delphi method, expert panels, focus groups, interviews, multi-criteria analysis, observational techniques, SWOT analysis, counterfactual method.</i>	Marijana Sumpor
09:45-10:30	<b>Designing questionnaires and interviews</b> <i>Description: Survey and interview as evaluation methods. How to design a questionnaire (asking questions, setting range of assessment scale, internal consistency, use of results).</i>	Irena Đokić
10:30-11:00	Coffee break	
11:00-11:45	<b>Structure of the evaluation process</b> <i>Description: Three phases of evaluation: Inception phase, Working report, Final report – professional standards and experiences. Key evaluation methods: literature review, analysis of monitoring results, analysis of statistical data, survey and interview, synthesis and conclusions.</i>	Bojan Radej
11:45-12:30	<b>Evaluation anxiety</b> <i>Description: Presentation and discussion.</i>	Kruno Karlovčec
12:30-13:30	Lunch (catering)	
13:30-14:15	<b>Evaluations of the 5<sup>th</sup> generation</b> <i>Description: Classical sector based evaluation (activity - impact) is vertical; to study inter-sectoral impacts, horizontal approach is needed (indirect impacts), such as for evaluation of sustainable development, territorial cohesion, smart growth, gender equality... How to evaluate synergies – case studies?</i>	Bojan Radej
14:15-15:00	<b>Evaluation of synergies in PPP – group work</b> <i>Description: Participants split into 3-5 groups and apply new intervention logic and evaluation of synergies methods.</i>	Bojan Radej/ Marijana Sumpor
15:00-15:15	Coffee break	
15:15-16:00	<b>Evaluation of synergies in PPP – presentation</b> <i>Description: Participants split into 3-5 groups and apply new intervention logic and evaluation of synergies methods.</i>	Bojan Radej/ Marijana Sumpor
16:00-17:00	<b>Certificates &amp; drinks</b>	Trainers & Participants

\*PPP – Policies, programs and projects.

**Note:** This training differs from the previous two trainings as it is conducted entirely in English, lasts for two days covering evaluation methodology and exercises, followed-up by a two day conference for evaluation practitioners that present and discuss real life cases and experiences.

## REFERENCES OF KEY TRAINERS

**mag. Bojan Radej, Slovenian Evaluation Society** – macroeconomist, methodologist and evaluator. Former fellow of governmental Institute of Macroeconomic Analysis and Development (1987–2004), external fellow for Environmental Economics at Economic Faculty/University of Ljubljana (1993–2002). Initiator and first editor of Slovenian Economic Mirror (1994–1998). As evaluator, he:

- Is founder of **Slovenian Evaluation Society**,
- Is initiator, co-founder and administrator of Western Balkan Evaluation Network and its Forum.
- Took part in evaluation of national policies: Operational program for implementation of cohesion policy in Slovenia (2007–2013 and 2014–2020), innovation policy (2007–2011), research infrastructure (2011–2014), energy policy, territorial cohesion, spatial development policy and many others.
- Is innovator in evaluation methodology:
  - Several faculties in Slovenia apply his papers as studying material for their students on post-graduate level (public administration, spatial planning, social sciences, applied social sciences, social work, cultural heritage).
  - His book “Policy evaluation: Horizons of new mentality” (2011, with Mojca Golobič, Mirna Macur, Srečo Dragoš, Ljubljana: Vega; in Slovenian language) was declared by national research agency as one of the scientific achievements of the year in Slovenia (2012).
  - Council of Europe adopted intervention logic for its European Cultural Heritage Strategy for the 21<sup>st</sup> Century (2017) from his proposal (in co-authorship with Jelka Pirkovič). The Strategy has been adopted at political level as a recommendation for 47 member states for nationally specific application.
- Is author of several educational and training programs (for Faculty of Economics, Gea College – Ljubljana, Slovenian Evaluation Society) on EU structural policy, cultural heritage policy, and on policy impact evaluation.

**Dr. Marijana Sumpor, HEM/EIZ** – has more than 20 years of work experience in research, evaluation, consultancy and training. She is a researcher at the Institute of Economics, Zagreb since 2001 and gained her doctoral degree in 2005 at the Faculty of Economics, University of Split. She is a native Croatian speaker, fluent in English and German. Earlier, she worked as a macroeconomist at the Ministry of Finance of the Republic of Croatia (1995–1998) and risk manager in the BNP-Dresdner Bank (Croatia) d.d. (1998–2000). Her main fields of interest as a researcher and evaluator are: regional policy, local and urban development, multilevel governance, strategic planning, and evaluation of public policies, programs and projects (PPP). Besides conducting research studies, policy evaluations and project assessments, she designs and implements training programs (project cycle management, strategic planning, management and evaluation for the public sector). She is author or co-author of more than 50 publications: <http://www.eizg.hr/en-US/-Dr-Marijana-Sumpor-71.aspx>. Selected project references 2012–2017:

- Evaluation of the National Strategy for Creating an Enabling Environment for the Development of NGOs in Croatia 2012–2016
- Contact point for Evaluation Helpdesk; Support to the European Commission in collecting, quality assessment and synthesis of findings in evaluation reports of Member States (2015–2017)
- Design of participatory and integrative Strategy for regional development of the Republic of Croatia and definition of development priorities on NUTS II level (2015–2016)

- Ex-ante evaluation of the Croatian Strategy on the Development of Entrepreneurship (2013)
- Study on the assessment of potential effects of additional cross-border infrastructure on regional economic development and of cross-border cooperation potentials in the border regions of Kosovo, FYR Macedonia and Albania (2012)
- Assessment of the strategic planning system and development financing possibilities of counties and local units in the context of implementing national regional development policy (2012)
- Ex-post evaluation of the integrated local strategic development program of the Towns of Samobor, Benkovac, Vukovar. (2008–2009)
- Since 2006 participated as an Assessor in Evaluation of Grant Schemes in several hundred EU funded projects (CARDS, PHARE, IPA CBC, IPA & ESIF).

**Dr. Irena Đokić, ERSA/EIZ** – holds a doctorate degree in Economics, and is currently employed at the Institute of Economics, Zagreb. Her interests include regional and local development with focus on urban economics, brownfields and urban regeneration. As a trainer and guest lecturer at the Faculty of Economics, Pula and Faculty of Architecture, Zagreb, and for public administration officials, she delivers modules on strategic development planning and programming, regional and local policy, and project cycle management (PCM). She is member and president of the Croatian section of the European Regional Science Association (ERSA) and the NGO European Education Forum, Zagreb. She was engaged as an expert and assessor in CBC programs (SLO-HU-CRO, HR-BIH) and was member of the External Assessment Panel in URBACT III program. She develops and implements training programs on PCM & LFA, evaluation of policies, programs and projects, strategic planning and management, brownfield regeneration and redevelopment, and other tailor made training programs. She published scientific and professional papers and co-authored the book “Strategic Programs for Local Development – Croatian Experiences”. Relevant references include:

- Evaluation of the National Strategy for Creating an Enabling Environment for the Development of NGOs in Croatia 2012–2016; EIZ (2016)
- Ex-ante evaluation of the County development strategy for the Medjimurje county; EIZ (2017)
- Assessment of the strategic planning system and development financing possibilities of counties and local units in the context of implementing national regional development policy; EIZ (2012)
- Assessment of financing options for the development of the Judicial Square in Zagreb; EIZ (2012)
- Ex-ante evaluation of the Strategic development program of the Town of Samobor 2012 – 2020; EIZ (2011)
- Ex-ante evaluation of the County development strategy of the Primorje – Gorski kotar county 2010.–2013; EIZ (2009)

#### *Guest lecturer*

**Kruno Karlovčec**, Slovenia – is an evaluation professional from Slovenia; geographer from University of Ljubljana, Faculty of Arts. He has ten years of professional experience in evaluation, predominantly in the field of European Cohesion Policy. He was a member of Slovenian Inter-ministerial steering group on evaluation in 2008-2009 in Cohesion Policy and Slovenian representative in European Commission’s evaluation partnerships of DG REGIO and DG EMPL. He is a member of Slovenian Evaluation Society, IDEAS (International Development Evaluation Association) and American Evaluation Association. He is interested in assessing the process of evaluation capacity building, use of evaluation reports and evaluation as a tool of organizational improvement for better public service delivery.

**The core of this training program is verified as relevant by:**

- WBEN – Western Balkan Evaluation Network consisting of 6 national evaluation communities (Bosnia and Herzegovina, Croatia, Macedonia, Montenegro, Serbia, Slovenia).
- Dr. Pavle Gantar, professor of spatial sociology, former Minister of Environment and Minister of Information Society, Slovenia.
- Mrs. Slavi Pevec, senior expert at European agency for vocational training (Cedefop).
- mag. Jorg K. Petrovič, first deputy president of Slovenian Court of Audit.
- Marko Žabojec, head of Sector for Planning and Strategic Monitoring of ESI Funds, Department for Strategic Planning, Coordination of EU Funds and International Programmes, Ministry of Regional Development and EU Funds, Republic of Croatia.
- prof. dr. Ines Kersan-Škabić, professor at University of Juraj Dobiča in Pula and evaluator of EU projects.
- prof. dr. Zdravko Petak, professor at University of Zagreb, Faculty of Political Science.
- Tatjana Čorlija Milivojević, EU department chief at Hrvatska elektroprivreda d.d.
- prof. dr. Irena Lazar, dean of Faculty of Humanistic Studies, University of Primorska, Koper, Slovenia.
- Dragana Aleksić, head of the Group for EU Affairs and International Cooperation, Public Policy Secretariat of the Republic of Serbia.

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*Participants have assessed the first (07/2016, Ljubljana) and second regional evaluators' training (12/2016) with a grade of 4,1 (on scale 1 unsatisfactory – 5 excellent).*

## REGISTRATION AND IMPORTANT INFO

Location of training: Zagreb, Croatia, IMPACT HUB, Vlaška 70E, 10000 Zagreb (<https://zagreb.impacthub.net/>)

Time and duration: Monday 23.10. at 9:00 to Tuesday 24.10.2017 by 17:00

Target audience: Practicing (up to 5 years) and new (up to 3 years) evaluators in the public sector (local, regional and national), consulting, civil society organizations and researchers. Especially relevant for those involved in implementation of EU instruments and evaluation of development assistance programs.

Language: English.

Training fee: Including coffee, lunch and materials

- Early bird registration with the fee received **before September 15, 2017**: 300,00 euro or 2.250,00 kuna
- Registration after September 15, 2017: 400,00 euro or 3.000,00 kuna

A: 10% discount if registered for 2<sup>nd</sup> regional conference of evaluators WBEN & SEE (Conference information available at: [www.eizg.hr](http://www.eizg.hr) and [www.sde.si](http://www.sde.si))

B: Additional group 10% discount for group registrations (3+ persons)

Gratis for two emerging evaluators from small civil society organizations – send your request, motivational letter and CV before end of September. Gratis participants are asked to cover their cost of arrival and accommodation.

If more than 25 persons register for the training, those who registered earlier will have priority.

10% of the training fee per participant will be earmarked for future projects in the Western Balkan Evaluation Network and in its national members.

Organizers: Slovenian Evaluation Society (Bojan Radej, [bradej@gmail.com](mailto:bradej@gmail.com)), Croatian Evaluation Network (Institute of Economics, Zagreb; Marijana Sumpor, PhD, tel: +385.(0)1.236.22.00, [msumpor@eizg.hr](mailto:msumpor@eizg.hr)).

Organizers retain a right to make smaller changes in the program.

Accommodation: Participants need to organize their accommodation on their own!

*Recommendations for accommodation close to training venue:*

Hotel Dubrovnik – 4\* <https://hotel-dubrovnik.hr/>

Art Hotel Like – 3\* <http://www.arthotellike.hr/hr/>

Hotel Jadran – 3\* <http://www.hotel-jadran.com.hr/>

*Conference venue (cca. 20 min by public transport to training venue):*

Hotel International – 4\* - <http://www.hotel-international.hr/>