



**European Academy**  
for Taxes, Economics & Law

**Including extensive  
interactive workshops**

Advanced Seminar

# **Evaluation Techniques for EU Funds in the Present and Next Programming Period 2014-2020**

**6<sup>th</sup> - 7<sup>th</sup> June 2013, Berlin**

With special focus on:

- **Evaluation 2014-2020**
  - Ex-ante, Ongoing and Ex-post Evaluation Requirements
  - New Logical Framework
  - Measurable Goals and Quality Indicators
  - Evidence Based Preparation of Cohesion Policy 2014-2020
  - Setting up an Evaluation Plan for the New Programming Period
- **Evaluation Criteria and Evaluation Questions**
- **Advanced Counterfactual Impact Evaluation**
- **How to Collect Data and Measure Impacts**

**Broschüre**

# ADVANCED SEMINAR

## Evaluation Techniques for EU Funds in the Present and Next Programming Period 2014-2020

### Ex-ante, ongoing and ex-post evaluation – What can we expect beyond 2013?

The real impact of EU Funds will be increasingly addressed in the new programming period 2014-2020. After 2013, you will not only have to assure the quality of your ongoing and in particular ex-post evaluations, you will also have to fulfil the evaluation and monitoring rules of the new programming period 2014-2020. The European Commission demands that EU strategies and programmes are evaluated rigorously and on a regular basis on both national and regional level. However, how do you measure the success of EU Funds? Which evaluation method should be selected? And how do you assess the impact of actions and the economic growth in your country?

### Do you know how to properly collect data and measure impacts?

For proper evaluation you need a qualified database on outputs, results and the impact of projects. Targets and outcome indicators have to be clear and measurable. Information about the indicators and the progress towards the agreed targets shall be central in the annual report. Moreover, the Commission recommends a much greater use of strict evaluation methods, such as impact evaluation, and demands that plans for ongoing evaluation of each programme shall become obligatory. Therefore, a proper toolkit of evaluation methods is crucial for your current and coming activities in EU Funds management.

Be pro-active and become familiar with the upcoming obligations already at an early stage!

### Special:

To tailor the programme to your personal training needs, we encourage you to send in your particular questions beforehand. Please also indicate which topics are specifically important for you, even though they are not precisely covered by the programme.

Please send your questions at least two weeks before the workshop to: [coordination@euroacad.eu](mailto:coordination@euroacad.eu)

Our experts will integrate these issues into the workshops and provide recommendations.

### Who is this seminar for?

**This workshop is targeted at public authorities such as ministries and agencies responsible for monitoring and evaluating Operational Programmes of EU Funds as well as for Regional Policy and EU Structural Funds from departments such as:**

- Evaluation Unit
- EU Funds Management Department
- Project Implementation Unit
- Business Improvement Services
- Strategy and Business Planning
- Clusters Policy
- Regional Development Strategies

### Furthermore this workshop is addressed to:

- Consultancies in the field of regional policy and regional development strategies
- Project Managers





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## What will you learn at this seminar?

- What will be expected from you regarding evaluation in the next programming period 2014-2020?
- How can you implement the new regulation requirements into practice?
- To which extent will evaluation and monitoring in 2014-2020 focus on results?
- How should ex-ante, ongoing and ex-post evaluations be carried out for the present and the next programming period?
- How to increase the quality of your evaluations?
- What are the European Commission's common indicators within the new logic framework 2014-2020?
- How to set measurable goals and good quality indicators?
- What are proper evaluation criteria and evaluation questions?
- How can you use evaluation findings for policy making with respect to an evidence-based Cohesion Policy 2014-2020?
- What are good practices from the European Commission and Member States?
- How to prepare an evaluation plan for the new programming period?
- Which methods should be used in which context and which data do they require?
- Which strategies have proven successful for collecting data and measuring impacts correctly?
- For which projects and programmes is counterfactual impact evaluation useful?

*"First seminar ever that in 100 percent suits and meets my needs, requirements and expectation!"*

**Tomasz Owczarek, Specialist, Ministry of Agriculture and Rural Development, Poland**

## Compulsory Course for the „Master of Management in EU Funds“

This European Seminar is also an Compulsory Course for the „Master of Management in EU Funds“

For further Information, **please click here.**

## Your benefits

- Be well prepared for future evaluation obligations in the new programming period 2014-2020
- Receive a toolkit of different evaluation methods and how to implement them in practice – Guarantee good quality and gain certainty in your daily tasks
- Profit from interactive workshop sessions – Work in small groups on practical examples
- Determine the content of the seminar according to your needs – Send your own questions and problems beforehand
- Avoid common mistakes and pitfalls – Learn from best practices
- Meet qualified experts and colleagues from other Member States – Network and exchange experiences



# PROGRAMME DAY 1

## Evaluation Techniques for EU Funds in the Present and Next Programming Period 2014-2020

8.30-9.00

Registration and Hand-out of Seminar Material

9.00-9.05

Opening Remarks from the European Academy for Taxes, Economics & Law

9.05-9.30

### Welcome Note from the Chair and Round of Introductions

- Expectations of the participants
- What are common questions and problems?

**Stanisław Bienias, Evaluation Expert, Poland**

9.30-10.00

### Focus on Results – New Approaches for Evaluation and Monitoring in 2014-2020

- Evaluation and monitoring – Their role in the programming and implementation of Operational Programmes 2014-2020
- Evaluation criteria and evaluation questions

**Stanisław Bienias, Evaluation Expert, Poland**

## Workshop

10.00-10.30

### Evaluation Criteria and Evaluation Questions

*In this interactive workshop participants will work on practical exercises with regard to evaluation criteria and evaluation questions.*

- Either a real case of one of the participants or an example provided by the speaker will be prepared and elaborated in small groups

**Workshop Special:** Send in your own questions and problems in advance to get solutions and recommendations from our expert during the workshop.

**Stanisław Bienias, Evaluation Expert, Poland**

10.30-10.45

Discussion Round

10.45-11.15

Coffee Break and Networking Opportunity



### STANISŁAW BIENIAS Evaluation Expert, Poland

Since 2004, Stanisław Bienias has been working in the Polish Ministry of Regional Development for the National Evaluation Unit. He became Head of this unit in 2006. He was responsible for organising

the process of evaluation for the National Development Plan 2004-2006 and the National Strategic Reference Framework 2007-2013. Furthermore, he coordinated the work of more than 50 evaluation units located in Operational Programmes and was responsible for building the evaluation culture in the public administration. In his extensive experience, he took part in the preparation of more than 100 evaluation researches and dozens of conferences and evaluation trainings. Stanisław Bienias represents Poland in the DG REGIO Evaluation Network meetings and gives lectures concerning evaluation, monitoring and indicators for postgraduate studies.

11.15-12.15

### Ex-ante, Ongoing and Ex-post Evaluation – How Will it Work in the 2014-2020 Programming Period?

- New regulation requirements 2014-2020
- Ex-ante evaluation of developing Operational Programmes traditional vs. participatory approach
- Increased quality of ongoing evaluation – Focus on impacts
- Ex-post evaluation which improves strategic orientations of our programmes
- How to implement the new regulation requirements into practice – Good practices from the European Commission and Member States

**Stanisław Bienias, Evaluation Expert, Poland**

12.15-12.45

Discussion Round

12.45-14.00

Lunch Break and Networking Opportunity

*“Very professional speakers, very well structured programme and all the important topics were covered.”*

**Lyra Donovan, Chief Specialist, EU Support Planning and Procedures,  
Ministry of Environment, Lithuania**



European Academy  
for Taxes, Economics & Law

Best  
Practices

14.00-15.00

### **New Logic Framework 2014-2020 – How to Set Measurable Goals and Good Quality Indicators**

- SMART objectives – A precondition for good quality indicators in Operational Programmes 2014-2020
- Different types of indicators
- From product-result-impact to product-outcome-approach
- European Commission common indicators 2014-2020

**Stanisław Bienias, Evaluation Expert, Poland**

15.00-15.30

Discussion Round

15.30-16.00

Coffee Break and Networking Opportunity

17.00-17.30

### **Evidence-Based (Cohesion) Policy 2014-2020 – How to Use Evaluation Findings for Policy Making**

- How to disseminate evaluation knowledge
- Existing systems for implementing recommendations
- Best practices from different Member States

**Stanisław Bienias, Evaluation Expert, Poland**

17.30-18.00

Discussion Round

18.00

End of Day One

## **Workshop**

16.00-16.30

### **How to Set Goals and Select Relevant Indicators**

*In this interactive workshop participants will work on practical exercises on how to set goals and select relevant indicators.*

- Either a real case of one of the participants or an example provided by the speaker will be prepared and elaborated in small groups

**Workshop Special:** Send in your own questions and problems in advance to get solutions and recommendations from our expert during the workshop.

**Stanisław Bienias, Evaluation Expert, Poland**

16.30-17.00

Reporting and Discussion Round

*"I received a lot of new information and systematised what I already knew."*

**Katerina Rangelova, Expert, Evaluation, Monitoring and Coordination  
Department, Ministry of Labour and Social Policy, Bulgaria**

*"One of the best seminars I attended."*

**Edmund Škorvaga, Head of Department, EU Programmes, Ministry of Health, Slovakia**

## PROGRAMME DAY 2

# Evaluation Techniques for EU Funds in the Present and Next Programming Period 2014-2020

9.00-9.05

### Welcome Note from the Chair

**Stanisław Bienias, Evaluation Expert, Poland**

9.05-9.45

### Picking up from Day 1 – How to Prepare an Evaluation Plan for the New Programming Period

- What is an evaluation plan?
- Elements and requirements

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

## Workshop

9.45-11.15

### How to Prepare an Evaluation Plan

*In this interactive workshop participants will work on practical exercises on how to prepare an evaluation plan.*

- Either a real case of one of the participants or an example provided by the speaker will be prepared and elaborated in small groups

**Workshop Special:** Send in your own questions and problems in advance to get solutions and recommendations from our two experts during the workshop.

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

**Stanisław Bienias, Evaluation Expert, Poland**

11.15-11.45

Coffee Break and Networking Opportunity



### BERND SCHUH

**Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

Bernd Schuh is senior expert and member of the board of directors of Austrian Institute for Regional Studies and Spatial Planning (ÖIR). He has vast experience in fields such as economic, agricultural and environmental policy on EU level. In addition, he is a member of the European Working Group on Multi-Criteria Decision Analysis methods. Bernd Schuh has notably worked on structural funds evaluations, spatial monitoring of structural funds effects in terms of urban development as well as social issues and sustainability of structural funds implementation. In the field of rural development he has been Project Manager of the LEADER+ MTE synthesis as well as RD ex-ante evaluation synthesis and RD MTE synthesis commissioned by DG Agriculture. Moreover, he has been key expert in the LEADER European Observatory Network expert pool contributing to the publications of contact point of the LEADER European Observatory and key expert for quantitative evaluation in the EU Evaluation Network for Rural Development and in the European Network for Rural Development. Bernd Schuh has profound experiences in evaluation practice and theory – being both a consultant for international, national and regional authorities as well as a university lecturer at two universities in Vienna and a guest lecturer at different universities in Rome, Seville and Sheffield.

11.45-12.15

### The Implications from the Evaluation Plan – Methods to be Used for the Individual Evaluation and their Data Requirements

- Quantitative methods (modeling approaches, MCA, etc.)
  - Practical examples
- Qualitative methods (case studies, interviews, action research, etc.) – Practical examples

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

12.15-12.30

Discussion Round

12.30-13.30

Lunch Break and Networking Opportunity





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13.30-13.45

### Advanced Counterfactual Impact Evaluation

- What is the goal of Counterfactual Impact Evaluation?
- For which projects and programmes is Counterfactual Impact Evaluation useful?

*This presentation gives a short introduction into advanced Counterfactual Impact Evaluation as basis for the following sessions. The methods will be addressed in further detail with case studies and practical exercises during the workshop in the afternoon.*

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

13.45-14.00

Discussion Round

14.00-14.45

### How to Collect Data and How to Measure Impacts

- Difference-in-difference
- Matching
- Propensity score matching
- Discontinuity design
- Pipeline approach
- Best practice examples

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

14.45-15.00

Discussion Round

15.00-15.30

Coffee Break and Networking Opportunity

## Workshop

15.30-16.15

### How to Use Counterfactual Impact Evaluation

*In this interactive workshop participants will work on practical exercises on how to use counterfactual impact evaluation.*

- Either a real case of one of the participants or an example provided by the speaker will be prepared and elaborated in small groups

**Workshop Special:** Send in your own questions and problems in advance to get solutions and recommendations from our two experts during the workshop.

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

**Stanisław Bienias, Evaluation Expert, Poland**

**Practical Examples**

16.15-16.45

### Provisions that Data Required – Lessons Learnt from the Exercises

- Quantitative methods (modeling approaches, MCA, etc.)
  - Practical examples
- Qualitative methods (case studies, interviews, action research, etc.)
  - Practical examples

**Bernd Schuh, Evaluation Expert and Member of the Board of Directors, Austrian Institute for Regional Studies and Spatial Planning (ÖIR), Austria**

16.45-17.00

Discussion Round

17.00

End of Seminar and Handout of Certificates

*“Very helpful and precise to the point, with an aim to assist with the problems we usually face during our day-to-day operations”*

**Marios Savvides, Procurment Officer, European Funds, Ministry of Education and Culture, Cyprus**

# ORGANISATIONAL MATTERS

## Evaluation Techniques for EU Funds in the Present and Next Programming Period 2014-2020

### Date of Event

6<sup>th</sup> - 7<sup>th</sup> June 2013

### Booking Number

S-582 MC

### Event Language

The event language will be English.

### Event Price

**Early booking contingent until the 5<sup>th</sup> of April 2013:**

**989,- Euro, excl. German VAT (19%)**

Normal price from the 6<sup>th</sup> of April 2013:

1.289,- Euro, excl. German VAT (19%)

The above price covers the following:

- Admission to the seminar
- Hand-out documents in print and digital version
- Seminar certificate, if seminar fully attended
- Soft drinks and coffee/tea on both event days
- Lunch on both event days

### Booking Modalities

It is recommended to book soon as seats are limited. For organisational matters, we kindly ask you to complete the booking form in capital letters.

### BOOKING

Fax: +49 (0)30 802080-250

E-mail: [booking@euroacad.eu](mailto:booking@euroacad.eu)

Phone: +49 (0)30 802080-230

For online booking please visit  
our website: [www.euroacad.eu](http://www.euroacad.eu)

### Contact

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(Programme is subject to alterations)

### Event Location

Mercure Hotel Berlin City

Invalidenstrasse 38

10115 Berlin, Germany

Phone: +49 (0)30 308 260

Fax: +49 (0)30 308 26100

E-mail: [h5341@accor.com](mailto:h5341@accor.com)

Internet: [www.mercure.com](http://www.mercure.com)

Please contact the hotel directly and refer to the "European Academy for Taxes, Economics & Law" if you wish to benefit from a limited room availability-contingent. Of course you can always look for an alternative hotel accommodation.





**NOTE**

Please note, you can register as many delegates as you wish (except, the seminar is fully booked). You only need to copy this form for as many persons you wish.



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for Taxes, Economics & Law

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## BOOKING

BOOKING NUMBER: S-582 MC (PR)

6<sup>th</sup> - 7<sup>th</sup> JUNE 2013, BERLIN

Herewith we register the following persons for the Seminar: "Evaluation Techniques for EU Funds in the Present and Next Programming Period 2014-2020"

### Delegate 1

☐ Ms. ☐ Mr.

First name \_\_\_\_\_ Last name \_\_\_\_\_ Phone \_\_\_\_\_  
Department \_\_\_\_\_ Fax \_\_\_\_\_  
Job position \_\_\_\_\_ E-mail \_\_\_\_\_  
Your organisation \_\_\_\_\_  
Street \_\_\_\_\_  
Postcode / City \_\_\_\_\_  
Country \_\_\_\_\_

### Delegate 2

☐ Ms. ☐ Mr.

First name \_\_\_\_\_ Last name \_\_\_\_\_ Phone \_\_\_\_\_  
Department \_\_\_\_\_ Fax \_\_\_\_\_  
Job position \_\_\_\_\_ E-mail \_\_\_\_\_  
Your organisation \_\_\_\_\_  
Street \_\_\_\_\_  
Postcode / City \_\_\_\_\_  
Country \_\_\_\_\_

### Delegate 3

☐ Ms. ☐ Mr.

First name \_\_\_\_\_ Last name \_\_\_\_\_ Phone \_\_\_\_\_  
Department \_\_\_\_\_ Fax \_\_\_\_\_  
Job position \_\_\_\_\_ E-mail \_\_\_\_\_  
Your organisation \_\_\_\_\_  
Street \_\_\_\_\_  
Postcode / City \_\_\_\_\_  
Country \_\_\_\_\_

### Invoice organisation

To the attention of \_\_\_\_\_  
Street \_\_\_\_\_ Phone \_\_\_\_\_  
Postcode / City \_\_\_\_\_ Fax \_\_\_\_\_  
Country \_\_\_\_\_ E-mail \_\_\_\_\_

In case of registration of more than one delegate - do you prefer: ☐ single invoice? ☐ collective invoice?  
With my signature I confirm my registration and accept the General Terms and Conditions as legally binding.

☐ I herewith agree to receive further information from the  
European Academy for Taxes, Economics & Law

**NOTE**

Only Valid with Signature and Stamp.

Place, Date

Authorised Signature and Stamp



# Terms & Conditions for Conferences, Seminars and other Training Courses

## 1. Area of Application

The following terms and conditions settle the contractual relationship between conference participants and the European Academy for Taxes, Economics & Law Brauner Klin- genberg GmbH [referred to as "European Academy for Taxes, Economics & Law" in the following]. Differing terms and conditions, as well as, other settlements and/or regulations have no validity.

## 2. Registration / Confirmation of Application

A registration can be made via internet, mail, fax, or email. The registration is considered granted and legally binding if not rejected by the European Academy for Taxes, Eco- nomics & Law in writing within seven (7) days after receipt of registration. The registration will be supplemented by a booking confirmation via email. Partial bookings are only valid for seminars designed in modules.

## 3. Service

The course fee covers the fee per participant and course in € net, subject to current German VAT. It includes training course documents as per course description, a lunch meal/ snack and refreshments during breaks, as well as, a participation certificate.

The European Academy for Taxes, Economics & Law has the right to change speakers/instructors and to modify the course program if and where necessary while maintaining the overall nature of the course. All registered participants will be notified in case of a course cancellation due to force majeure, due to speakers' preventions, due to troubles at the chosen location or due to a low registration rate. Course cancellation notification due to a low registration rate is issued no later than two (2) weeks before the course date. Course fees are reimbursed in the cases listed above; however, reimbursement for travel expenses or work absenteeism is only granted in cases of intention or gross negligence by the European Academy for Taxes, Economics & Law. Any reimbursement of travel expenses are to be considered as an exceptional goodwill gesture and form no future gen- eral obligation. In case of disturbances and/or interruptions, the European Academy for Taxes, Economics & Law commits itself to solve or limit any problems that might occur in order to maintain and continue the course as planned.

## 4. Payment Date and Payment, Default of Payment

Payment of the course fee is payable immediately upon receipt of invoice. Where payment is not received or lacking clear assignment to a participant prior to commencement of the course, the European Academy for Taxes, Economics & Law may refuse the relevant participant's participation in that course. The course fee, however, is still due immedi- ately and can be claimed as part of a dunning procedure or legal action. In accordance with BGB §247 (1), in case of default of payment within the stipulated time period, default interest on arrears of at least 5% above the ECB base rate is due and payable. The European Academy for Taxes, Economics & Law can claim higher damage for delay if and where proven. Equally, the participant may prove that a damage has not occurred or has had less effect than estimated by the European Academy for Taxes, Economics & Law.

Payment shall be made by cashless bank transfer; cash or cheques will not be accepted. The European Academy for Taxes, Economics & Law is not liable for any loss of means of payment. The participant may only offset such claims against the European Academy for Taxes, Economics & Law's as are undisputed, legally recognized or recognized in writing by the European Academy for Taxes, Economics & Law. The right of retention is only acceptable in accordance with a counterclaim based on the same contract.

## 5. Cancellation

Cancellations need to be issued in writing. Cancellation by the participant will be subject to cancellation charges as follows:

- 30 days or more prior to commencement of the course: service charge of 80,00 € net, subject to current German VAT, payable immediately, course fee will be reimbursed,
- two (2) weeks to 30 days prior to commencement of the course: 50% of course fee net, subject to current German VAT, payable immediately,
- non-attendance or cancellation less than two (2) weeks prior to commencement of the course: 100% of course fee net, subject to current Germany VAT, payable immediately

The European Academy for Taxes, Economics & Law gladly accepts without additional costs a substitute participant nominated in case of a cancellation if the substitute parti- cipant is registered at least three (3) days prior to the commencement of the course. Neither cancellation of a specific module/part of the course or substitution per module/per day is possible.

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## 7. Liability

All seminars and courses are prepared and presented by qualified speakers and instructors. The European Academy for Taxes, Economics & Law accepts no liability for the up- to-dateness, correctness and completeness of the seminar documentation, as well as, presentation of the seminar.

## 8. Applicable Law, Place of Jurisdiction, Place of Performance

All cases shall be governed and construed in accordance with German law to the exclusion of the UN Sales Convention. As far as legally admissible, place of performance and place of exclusive jurisdiction shall be Berlin, Germany.

## 9. Data Protection

The European Academy for Taxes, Economics & Law protects personal data by taking appropriate protection measures. For the purpose of optimization of the product and ser- vice portfolio and according to the regulations of the data privacy laws, it stores and processes person-specific data on the training participants. Hence, all European Academy for Taxes, Economics & Law website hits are registered. All personal data will, in accordance with the law, be used for documentation requests, placed orders or other enquiries in order to send information out by post.

The European Academy for Taxes, Economics & Law will, in accordance with the law, inform participants by email about special offers that resemble previously booked semi- nars. If and where personal data needs to be transferred to countries lacking appropriate data protection schemes, the European Academy for Taxes, Economics & Law shall grant alternative adequate protection. Furthermore, the European Academy for Taxes, Economics & Law will use personal data as far as participants have granted respective permission. When collecting personal data, the European Academy for Taxes, Economics & Law will always ask for permission regarding email information about offers. The participant may, at any time, express their objection to data collection for the purpose of advertisement or address via email or fax. Any data provided to the European Academy for Taxes, Economics & Law will be processed for reservations and bookings, as well as, for information about other seminars. Names and company names will be published in a participants' list and forwarded to the mailing company.