

Evaluability studies in evaluation planning

2024 Evaluation Helpdesk Summer School

27 June 2024

Evaluability Studies as part of an evaluation planning strategy

1. Building upon existing knowledge:

- ❖ Synthesis Report on Evaluation findings of Portugal 2020
- ❖ **Evaluability Studies of main public policies funded by PT2030**
- ❖ Studies on methodologies for evaluating Public Policies
- ❖ *Ex Ante* Evaluations of Portugal 2030 Programmes

2. Consultation and dialogue with partners and stakeholders → potential Users of evaluations

Technical coordination and Managing Bodies

Monitoring and Evaluation Network

Political coordination

Interministerial Coordination Commission

3. Scoping, prioritisation and tentative timetable of Evaluation → **Evaluation Plans**

4. Implementing the Evaluations Plans – e.g. drafting **Terms of Reference**




Carrying out the Evaluability Studies

4 (four) Evaluability Studies on key thematic areas of the previous and current programming period: **Research and Innovation** | **Education and Training** | **Climate Action** | **Employment and Social Inclusion**

Main purposes: support planning and designing evaluations, focus on programme theory review, identification of most suitable methods, identify data needs and availability, engaging Academia

Main tasks:

1. **Reviewing/revising Programme Theory** – through an **extensive literature review**, **stakeholders’ consultation** (focus groups), and **preliminary validation against available secondary information**
2. **Identification of evaluation needs** – **knowledge gaps** in the intervention logic inform **where evaluation efforts may be concentrated** – what evaluations (scope, nature, EQ, timing) should be carried out
3. **Identification of the most appropriate designs and methods** (namely CIE and TBE for impact evaluations), **data requirements and availability** and further **data collection needs**
4.  A **“test run” of specific TBE methods** (a different one for each of the 4 Studies), to inform and complement a **Contribution analysis on EU Funds to Europe 2020 targets**



Learning from the Evaluability Studies process

Main takeaways:

- ✓ Useful **comments from the Helpdesk** at an early stage of the studies highlighted strengths and weaknesses of the studies design and **clues in moving forward with the studies**
- ✓ The studies have been **most useful regarding**:
 - Substantive **theory review** and clarification of the use of **conceptual discussion on the framework of programme theory** and ToC
 - Recommendations of **future evaluations according to knowledge gaps**
 - Recommendations of **evaluation designs**, appropriate **methods** and (to a less extent) **data** requirements
- ✓ The thematic scope and range of tasks **required a diverse set of skills** from the research team, and **a combination of thematic knowledge** and **expertise on quantitative and qualitative methods** (and openness to combine them)
- ✓ **Tender preparation** which included information gathering (programing documents, calls, data from monitoring systems) and **drafting early versions of ToC** was, by itself, an **important learning experience**
- ✓ These studies helped foster awareness of **policy evaluation needs** and further **research opportunities** (in the field and exploring new methods – TBE) in **Academia**

Thank you!

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