



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

# Monitoring and Evaluation Methods for EU Funds - How to Measure the Success of Projects and Programmes

European Seminar  
16<sup>th</sup> - 17<sup>th</sup> September 2010, Berlin, Germany

Brochure

# EUROPEAN SEMINAR

## Monitoring and Evaluation Methods for EU Funds

### - How to Measure the Success of Projects and Programmes

#### BACKGROUND

The transparent presentation of programme activities becomes increasingly essential in the EU Funds practice. Responsible bodies like Regional Development Agencies need a qualified database on output, results and the impacts of project measures.

The monitoring and evaluation of projects and operational programmes aims at improving the quality, effectiveness and consistency of the assistance from EU Funds. The EU Commission requires that evaluation systems are linked to the monitoring of operational programmes. This enables regional and national authorities to undertake prompt actions in case the implementation process manifests a significant deviance from the goals initially set. Therefore a proper toolkit of evaluation methods is crucial for the coming activities of EU Funds management.

Both on national and regional level EU-strategies and -programmes have to be evaluated regularly. But how to measure the success of European Structural Funds? And how to assess the impact of actions and the economic growths in your country?

#### SEMINAR CONTENTS

This practical seminar focuses on the proper monitoring and evaluation methodology. Experts give an overview on evaluation in the current programming period. Moreover, they present and discuss the results and experiences of the final reports 2000 – 2006 as well as European Commission requirements of ongoing evaluation measures in the period 2007 – 2013. The toolkit consisting of baseline indicators, impact indicators or result indicators will be introduced. Best practice and successful case studies from different Member States enrich the programme flow.

#### TEACHING METHODS

- Lectures and case studies
- Best practice examples from old and new Member States
- Every presentation is followed by a qualified Q&A Session to discuss both general and individual questions with the experts
- Interactive exchange of experiences and ideas
- Rich course material and hand-outs

#### TARGET GROUP

This seminar is targeted at public offices responsible for Monitoring and Evaluation of Operational Programmes of EU Funds as well as public authorities responsible for regional policy and EU Structural Funds such as:

- Ministries of Regional Development
- Ministries of Economy
- Ministries of Finance
- Ministries of Transport
- Ministries of Labour
- Ministries of Education
- Ministries of Agriculture
- Regional Development Agencies
- National Development Agencies
- Investment Agencies
- Regional Networking Groups involved in cluster projects and initiatives

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 seminar is addressed to:

- Consulting Companies in the field of regional policy and regional development strategies

### Compulsory Course for Master of Management in EU Funds

#### YOUR BENEFIT

- Learn how to evaluate the efficiency of programmes and measures
- Get information on how to assess the effects of different evaluation tools
- Gain knowledge on fund management issues in the field of monitoring and evaluation
- Familiarise yourself with different models, indicators, measures and tools
- Learn the latest evaluation models for regional policy makers
- Gain the knowledge how to assess the economic impact of major projects
- Get best practice examples from several member states
- Exchange knowledge and experience with employees of institutions from other Member States

# PROGRAMME DAY 1

## Monitoring and Evaluation Methods for EU Funds

- How to Measure the Success of Projects and Programmes



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16<sup>th</sup> September 2010

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

9.05-9.15

### Welcome Note from the Chair

**Stanislaw Bienias, Head of National Evaluation Unit, Department of Structural Policy Coordination Ministry of Regional Development, Poland**

9.15-9.45

### Monitoring and Evaluation: An Introduction

- Overview on monitoring and evaluation in current programming period
- Monitoring and evaluation – looking at different perspectives

**Stanislaw Bienias, Head of National Evaluation Unit, Department of Structural Policy Coordination Ministry of Regional Development, Poland**

9.45-10.00

Q&A Session

10.00-10.30

Coffee Break

10.30-11.00

### Evaluation Models for Regional Policy Makers

- International state of the art of regional economic modeling
- Examples of regional economic policy impact assessment methods used in the EU (from DG Employment research project)
- Case studies of policy impact assessment with some models
- Trends and future research
- Conclusions and recommendations

**Gerbrand van Bork, Senior Economist ECORYS, The Netherlands**

11.00-11.15

Q&A Session

11.15-12.15

### Evaluation Requirements in ESF, ERDF, CF and how to Implement them

- European regulations and existing working documents
- Organisation of evaluation system
- Building the evaluation culture and coordination
- Use of evaluation results
- Evaluation strategy for specific structural funds
- Best practice in Member States

**Stanislaw Bienias, Head of National Evaluation Unit, Department of Structural Policy Coordination Ministry of Regional Development, Poland**

12.15-12.30

Q&A Session

12.30-13.45

Lunch Break

13.45-14.45

### Evaluation Step-by-Step –

#### How to Carry out a Successful Evaluation Study?

- Elaborating terms of reference for evaluation research
- How to manage the research process to receive good quality report?
- Different methods of simple and complex interventions - impact evaluation
- Best practice in Poland

**Stanislaw Bienias, Head of National Evaluation Unit, Department of Structural Policy Coordination Ministry of Regional Development, Poland**

14.45-15.00

Q&A Session

15.00-15.30

Coffee Break

15.30-16.15

### Measuring Tools for Monitoring and Evaluation of ERDF Projects

- Types of indicators
- Monitoring and evaluation plans
- Product, result and impact indicators
- Indicators quality criteria

**Stanislaw Bienias, Head of National Evaluation Unit, Department of Structural Policy Coordination Ministry of Regional Development, Poland**

16.15-16.30

Q&A Session

16.30-17.00

### How to Assess the Economic Impact of Major Projects

- Major projects, what makes them special?
- Recent developments in Cost-Benefit Analysis of major projects
- Types of impacts of major projects
- Models used for demand analysis and economic impact assessment for major projects in EU
- Case: impacts of a major transport or urban development project
- Conclusions and recommendations

**Gerbrand van Bork, Senior Economist ECORYS, The Netherlands**

17.00

End of Day One

# PROGRAMME DAY 2

## Monitoring and Evaluation Methods for EU Funds

- How to Measure the Success of Projects and Programmes

17<sup>th</sup> September 2010

9.00 - 9.05

### Welcome Note from the Chair

**Stanislaw Bienias, Head of National Evaluation Unit,  
Department of Structural Policy Coordination Ministry of  
Regional Development, Poland**

9.05-10.00

### Case Study: National Level

- Results and experiences of the 2000-2006 programming period
- Selected reports
- Best practice examples

**Stanislaw Bienias, Head of National Evaluation Unit,  
Department of Structural Policy Coordination Ministry of  
Regional Development, Poland**

10.00-10.15

Q&A Session

10.15-10.45

Coffee Break

10.45-11.30

### Lessons from London for City and Regional Policy Makers

- Brief history of London's economic development
- Factors for London's success
- Future challenges and how London will tackle them
- Summary of lessons for urban and regional policy

**Rob Whitehead, Head of Strategy and Business Planning,  
London Development Agency, United Kingdom**

11.30-11.45

Q&A Session

11.45-12.30

### Collaborative Network Programme

#### – Northern Ireland Experience

- Establishment of measures to see whether support has been effective
- How to effective support clusters and networks
- Efficient measures
- Evaluation tools
- Evaluation results

**David McKeown, Business Improvement Services in Invest,  
Northern Ireland**

12.30-12.45

Q&A Session

12.45-14.00

Lunch

14.00-14.45

### Case Study: Collaborative Network Programme

- First-hand experience from an expert on collaborative network
- What do you have to consider for a project to succeed
- Useful tools to predict success

**David McKeown, Business Improvement Services in Invest,  
Northern Ireland**

14.45-15.00

Q&A Session

15.00-15.30

Coffee Break

15.30-16.00

### Panel Discussion: Future Perspectives

- Future prospects of evaluation on national and regional level
- Panel discussion and open discussion with the audience

**Gerbrand van Bork, Senior Economist ECORYS,  
The Netherlands**

**David McKeown, Business Improvement Services in Invest,  
Northern Ireland**

**Rob Whitehead, Head of Strategy and Business Planning,  
London Development Agency, United Kingdom**

16.00

End of Seminar and Hand-out of Certificates

## SPEAKERS

### Monitoring and Evaluation Methods for EU Funds

- How to Measure the Success of Projects and Programmes



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#### STANISLAW BIENIAS

**Head of National Evaluation Unit, Department of Structural Policy Coordination, Ministry of Regional Development, Poland**

Since 2004 Stanislaw Bienias has been working in the Polish Ministry of Regional Development for the National Evaluation Unit, since 2006 as head of this unit. He has been responsible for organising the process of evaluation on the level of the National Development Plan 2004-2006 and the National Strategic Reference Framework 2007-2013. Furthermore, he has coordinated the work of more than 50 evaluation units located in operational programmes and for building the evaluation culture in 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. Stanislaw Bienias represents Poland in DG REGIO Evaluation Network meetings and gives lectures concerning evaluation, monitoring and indicators on postgraduate studies.

#### DAVID MCKEOWN

**Business Improvement Services in Invest, Northern Ireland**

David McKeown has managed Invest NIs Networking Team since 2007 and was involved in establishing the Collaborative Network Programme. He has worked in the field of economic development since 1992 working with sectors such as electronics, construction and contact centres. His current role also includes developing benchmarking activities among SMEs in Northern Ireland. David McKeown has also worked as a Project Manager for the implementation of an Electronic Record Management system in Invest NI. Before moving to economic development David McKeown was a qualified accountant.

#### ROB WHITEHEAD

**Head of Strategy and Business Planning, London Development Agency, United Kingdom**

Rob Whitehead heads up the London Development Agency's (LDA) Strategy and Business Planning Team, five years after joining the LDA via a project helping London win the 2012 Olympic Games. He is currently responsible for the LDA's 4 year Investment Strategy and all their business plans, which gives them real insight into the working of an RDA. He has worked extensively on London's efforts to maximise the regeneration benefits of the Olympics, and on the writing of the Mayor of London's Economic Development Strategy. Prior taking up a post at the London Development Agency Rob Whitehead worked in the international development NGO Actionaid on projects in Brazil, Haiti, Kenya and Guatemala. He has also worked on the UK national government initiative to eradicate child poverty in London and recently spoke about London at the Dynamic Regions conference in Shannon, Ireland. He has an MBA from Cranfield School of Management and Ecole de Management de Lyon.

#### DR. GERBRAND VAN BORK

**Senior Consultant Ecorys, The Netherlands**

Gerbrand van Bork is Senior Economist and Project Manager in ECORYS Netherlands and Manager Business Development for ECORYS International in Turkey. His working experience is about 16 years in the expertise areas regional development, transport and environment policies and projects. Dr. Gerbrand van Bork has managed a large variety of economic impact and Cost-Benefit Analysis studies of policies and major projects in these areas in a range of countries. Recently he was involved as key expert in a study for the European Commission reviewing the methods in the EU for impact assessment of social and employment policies.

# ORGANISATIONAL MATTERS

## Monitoring and Evaluation Methods for EU Funds

- How to Measure the Success of Projects and Programmes

### BOOKING NUMBER

S-224

### DATE OF EVENT

16<sup>th</sup> and 17<sup>th</sup> September 2010, Berlin, Germany

### 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.

### EVENT LANGUAGE

The event language will be English.

### EVENT PRICE

**Early booking contingent until the 25<sup>th</sup> of June 2010:**

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

Normal price from the 26<sup>th</sup> of June 2010:

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

The above price covers the following:

- Entrance for both event days
- Hand-out documents
- Soft drinks and coffee/tea
- Lunch on both days

### EVENT LOCATION

Maritim Hotel Berlin

Stauffenbergstraße 26

10785 Berlin, Germany

Phone.: +49 (0)30 2033 4410

Fax: +49 (0)30 2033 4092

E-Mail: [info.ber@maritim.de](mailto:info.ber@maritim.de)

Internet: [www.maritim.de](http://www.maritim.de)

Please contact the hotel directly and refer to the "European Academy for Taxes, Economics & Law" in order to benefit from a limited room contingent at a special price. Please book as soon as possible. Of course you can always look for an alternative hotel accommodation.

### 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)

**NOTE**

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



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**BOOKING**

BOOKING NUMBER: S-224(KB)

16<sup>th</sup> AND 17<sup>th</sup> SEPTEMBER 2010

Herewith we register the following persons for the European Seminar: "Monitoring and Evaluation Methods for EU Funds – How to Measure the Success of Projects and Programmes"

**Delegate 1**
 Mr.  Ms.

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

**Delegate 2**
 Mr.  Ms.

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

**Delegate 3**
 Mr.  Ms.

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

\_\_\_\_\_  
Place, Date

\_\_\_\_\_  
Authorised Signature / Stamp



**European Academy**  
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# TERMS & CONDITIONS FOR TRAINING SEMINARS & 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 Klingenberg 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, Economics & 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 general 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 immediately 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.

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- 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 participant 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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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.

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