EvAluation of SustainabilitY

European COnferences and Training Courses

2008-2010

Information on the Training Courses

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MARIE CURIE ACTIONS

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Who we are

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Research Institute for Managing Sustainability
Vienna University of Economics and Business Administration
www.sustainability.at

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Nachhaltigkeit lernen
Weltdekade der Vereinten Nationen 2005-2014
Bildung für nachhaltige Entwicklung
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Ausgezeichnet als offizielles Projekt der Weltdekade 2005 / 2006

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General Training objectives

The training courses are intended to **enable young researchers and practitioners to conduct actual evaluation projects in the future**. This requires

1. Professional ethics,
2. Paradigmatic orientation,
3. A market overview,
4. Theoretical and methodological knowledge,
5. Political sensitivity,
6. Networking,
7. Individual scientific support.

In addition the following **complementary skills** play a prominent role:

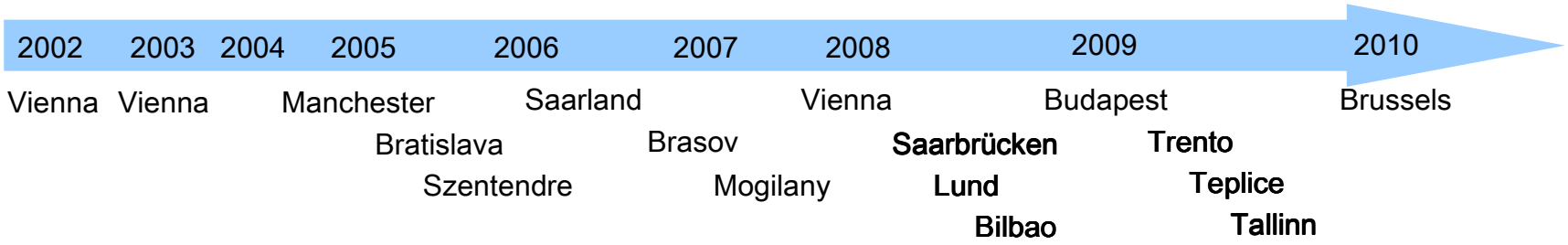
- Setting up a scientifically sound and attractive evaluation design
- Budgeting and managing an evaluation project
- Dealing with conflicting stakeholder interests
- Communicating the results of an evaluation

The two phases of EASY-ECO trainings

1. The first phase of the training is an **e-learning course** lasting almost 4 months. It provides theoretical input and support to the participants, focusing on evaluation terminology and various theoretical and methodological issues (e.g. theory-based evaluation, data aggregation), as well as on complementary skills (e.g. stakeholder involvement, presentation of results). Before the on-site training, you will receive access to the e-learning platform and have the opportunity to interact with the participants of your future training group. (As a trainer you will be able to access the platform at http://www.sustainability.eu/easy/elearning/index.php.)
2. The **on-site trainings** last for 5 days and focus on hands-on work and development of tacit knowledge and complementary (soft) skills. They are wholly devoted to case studies, one case study per a group of 10-15 young researchers. Trainings usually have 3 case studies all devoted to different fields of application, but we are also exploring the possibility to have thematic trainings, where all case studies would be focusing on e.g. energy. You should lead the participants in your group through all stages of a sustainability evaluation case (from answering a call for evaluation to delivering recommendations and perhaps beyond).

Dates and places of 2008-2010 trainings

Date	Event	Location	Organized by
Mar. 2008	Conference "Gover-nance by Evaluation"	Vienna, Austria	Vienna University of Economics and Busi-ness Administration
Sept. 2008	Training	Saarbrücken, Germany	Saarland University
Apr. 2009	Training	Lund, Sweden	Lund University
June 2009	Training	Bilbao, Spain	University of Basque Country
Oct. 2009	Conference "Stakeholder Perspective"	Budapest, Hungary	CEU Business School
Feb. 2010	Training	Trento, Italy	University of Trento
Apr. 2010	Training	Teplice, Czech Republic	The Regional Envi-ronmental Center for Central and Eastern Europe
June 2010	Training	Tallinn, Estonia	Stockholm Environment Institute Tallinn Centre
Nov. 2010	Conference "European Perspective"	Brussels, Belgium	Université Libre de Bruxelles



EASY-ECO e-course

The e-course builds on and expands the material originally contained in the core (morning) courses of the trainings.

The e-course will provide:

- Orientation in SD evaluations
- Environment for studying with reasonable flexibility
- Access to a wealth of structured information on SD evaluation
- Basic knowledge of the stages of an evaluation
- Contact with evaluation experts through videos, forum and chats
- Networking opportunities
- Opportunity to contribute to the content of the e-course to the benefit of the whole group
- Information package for evaluation practice at the end of the course

Our priorities

Course work: ca. 80 hrs. in total

Flexibility
The course is mainly asynchronous
Alternate dates for synchronous activities
Choosing one's own path through the units
Non-obligatory units with additional content and references

A fair share of group-work and interactive activities

Good online moderation

State-of-the-art form and content

Strong links to face-to-face trainings

Structure of the e-course

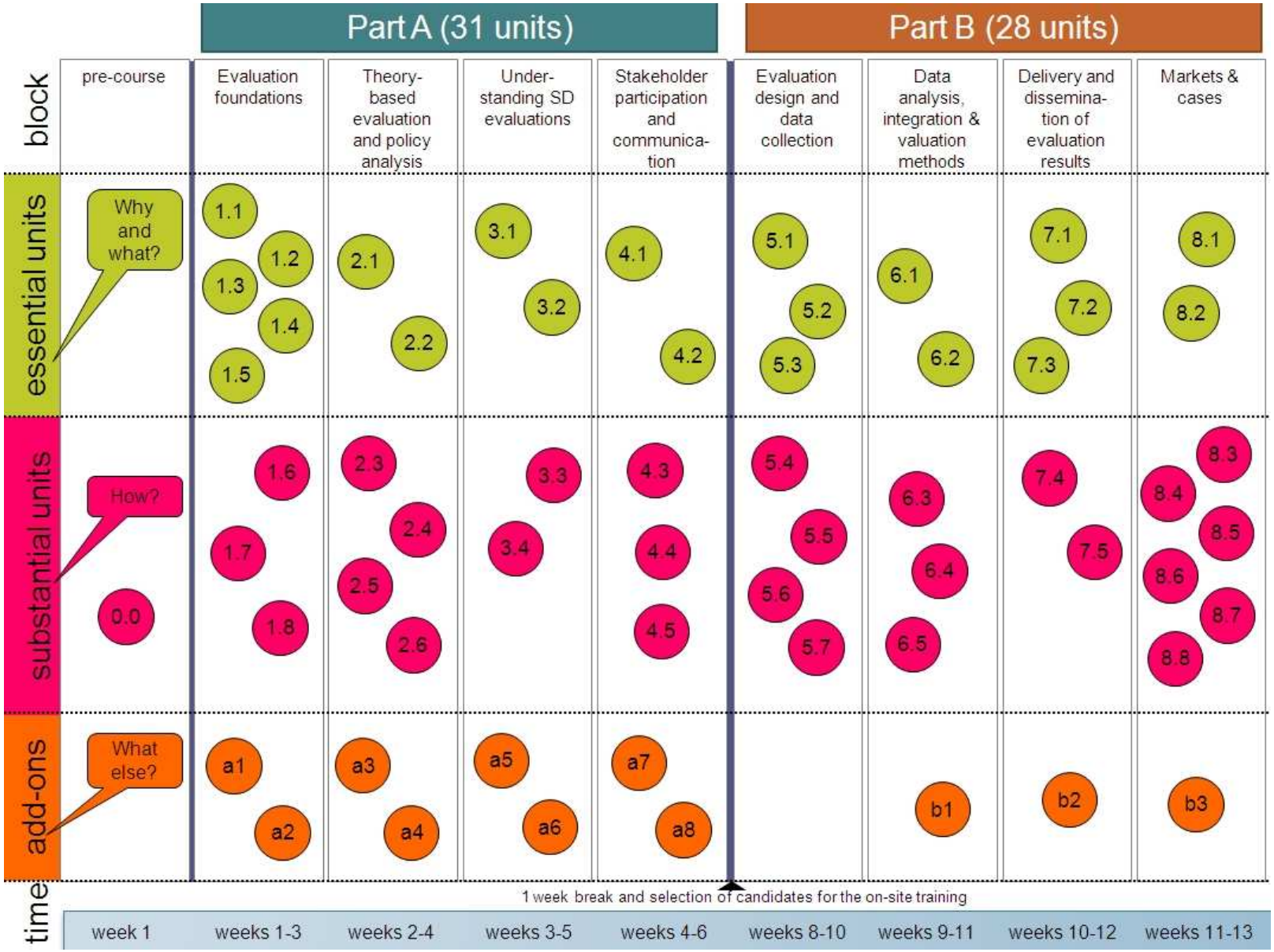
Part A: **Understanding Evaluations and Sustainable Development** (ca. 30 units)

- Block 1: Evaluation Foundations
- Block 2: Theory-Based Evaluations and Policy Analysis
- Block 3: Understanding SD Evaluations
- Block 4: Stakeholder Participation and Communication

Part B: **Performing SD Evaluations** (ca. 30 units)

- Block 5: Evaluation design and data collection
- Block 6: Data analysis, integration and valuation
- Block 7: Delivery and dissemination of evaluation results
- Block 8: Markets and cases

Structure of the e-course



Block 1: Evaluation Foundations

Topics:

- What does an evaluator do?
- Types and purposes of an evaluation
- The context of evaluations
- Core elements of an evaluation
- The chain of effects
- Overview on evaluation design
- Overview on evaluation models and theories
- Standards for evaluation
- Meta-evaluations and evaluation synthesis
- More evaluation models and theories

Learning objectives:

- Overview and orientation in the context of evaluations.
- The trainee is comfortable with the terminology used in evaluation terms of reference, is able to use basic terminology in proper context.
- He/she understands the context and logic of evaluations, as well as their types and purposes.
- He/she appreciates the ethics of an evaluator and is aware of quality requirements.

Block 2: Theory-Based Evaluations and Policy Analysis

Topics:

- What is theory-driven evaluation and why use it?
- The role of program theories
- Reconstructing program theories
- Searching for appropriate theories
- Conducting a theory-driven evaluation
- Logic models and logical frameworks
- The role of theories in evaluations
- Systemic evaluation

Learning objectives:

- The trainee is comfortable with theories of change.
- He/she is able to formulate a program theory and describe the steps of a theory-driven evaluation, including the practical ramifications.

Block 3: Understanding SD Evaluations

Topics:

- Historical context and meanings of SD
- Ethical issues of SD
- Strategic implications of SD
- Defining SD for the purpose of an evaluation
- Overview on SD evaluation applications
- SD evaluation techniques and tools
- SD indicators

Learning objectives:

- The trainee esteems the concept of sustainable development and its principles.
- He/she is able to discuss various definitions or interpretations of SD as well as their ramifications for an evaluation. He/she is able to operationalise the concept for the sake of an evaluation.

Block 4: Stakeholder Participation and Communication

Topics:

- The right to participate
- Purposes and levels of stakeholder involvement
- Making stakeholder involvement in SD evaluations work
- Identifying key stakeholders
- Techniques and tools for stakeholder involvement
- Participatory evaluation approaches

Learning objectives:

- The trainee appreciates the inherent (moral) value of enabling stakeholders to participate.
- The trainee is able to properly plan for stakeholder involvement, including the capacity to identify key stakeholders.
- The trainee is able to choose from an array of various techniques and tools for ensuring effective stakeholder involvement.

Block 5: Evaluation design and data collection

Topics:

- Designing an evaluation
- Introduction into scientific traditions and research strategies
- Research designs: planning data collection for SD evaluations
- Data collection procedures: interviews and questionnaires
- Data collection procedures: observation
- Data collection procedures: measuring and testing
- Quality of measurement, data processing

Learning objectives:

- The trainee is able to derive evaluation questions.
- He/she is able to judge and compare the utility of individual quantitative and qualitative data collection methods for a given evaluation study.
- He/she acquires at least a rudimentary competence to plan an SD evaluation and understands what factors influence it, including data quality and sources of data.

Block 6: Data analysis, integration and valuation

Topics:

- First steps in analysing and interpreting data
- Approaches to data integration and valuation
- Aggregation into one numerical index
- Algorithmic multi-criteria evaluation I
- Algorithmic multi-criteria evaluation II
- Social multi-criteria evaluation
- Techniques and software tools for performing integrated assessments

Learning objectives:

- The trainee is able to operate with the concepts of weighting, aggregation and valuation.
- He/she is able to address non-equivalent descriptive domains and the challenges of technical and social incommensurability.
- He/she develops an understanding of valuation and integration methods such as MSIA, SMCE, CBA, CEA and MIPS.
- He/she should acquire at least a basic competence to analyse and interpret data and make judgements.

Block 7: Delivery and dissemination of evaluation results

Topics:

- Introduction into communication management
- Drafting and writing evaluation reports
- Presenting evaluation findings and making recommendations
- Identifying and communicating with commissioning agents, evaluation partners and other audiences
- Ethical dilemmas
- From studies to streams: developing evaluation systems

Learning objectives:

- The trainee learns to respect clients, respondents and other stakeholders.
- He/she is able to plan communication with various audiences to maximise the usefulness of an evaluation as well as to communicate strengths and limitations of the evaluation.
- He/she is able to formulate recommendations.

Block 8: Markets and cases

Topics:

Cultures and capacities for SD evaluation

Markets for SD evaluation:
demand, support and driving forces

Important fields of application:

SD impact assessment

Sustainability assessment of development aid

Evaluations of SD strategies

Evaluations of EU Structural Funds

Strategic environmental assessment (SEA)

Evaluation of Local Agenda 21 (LA21)

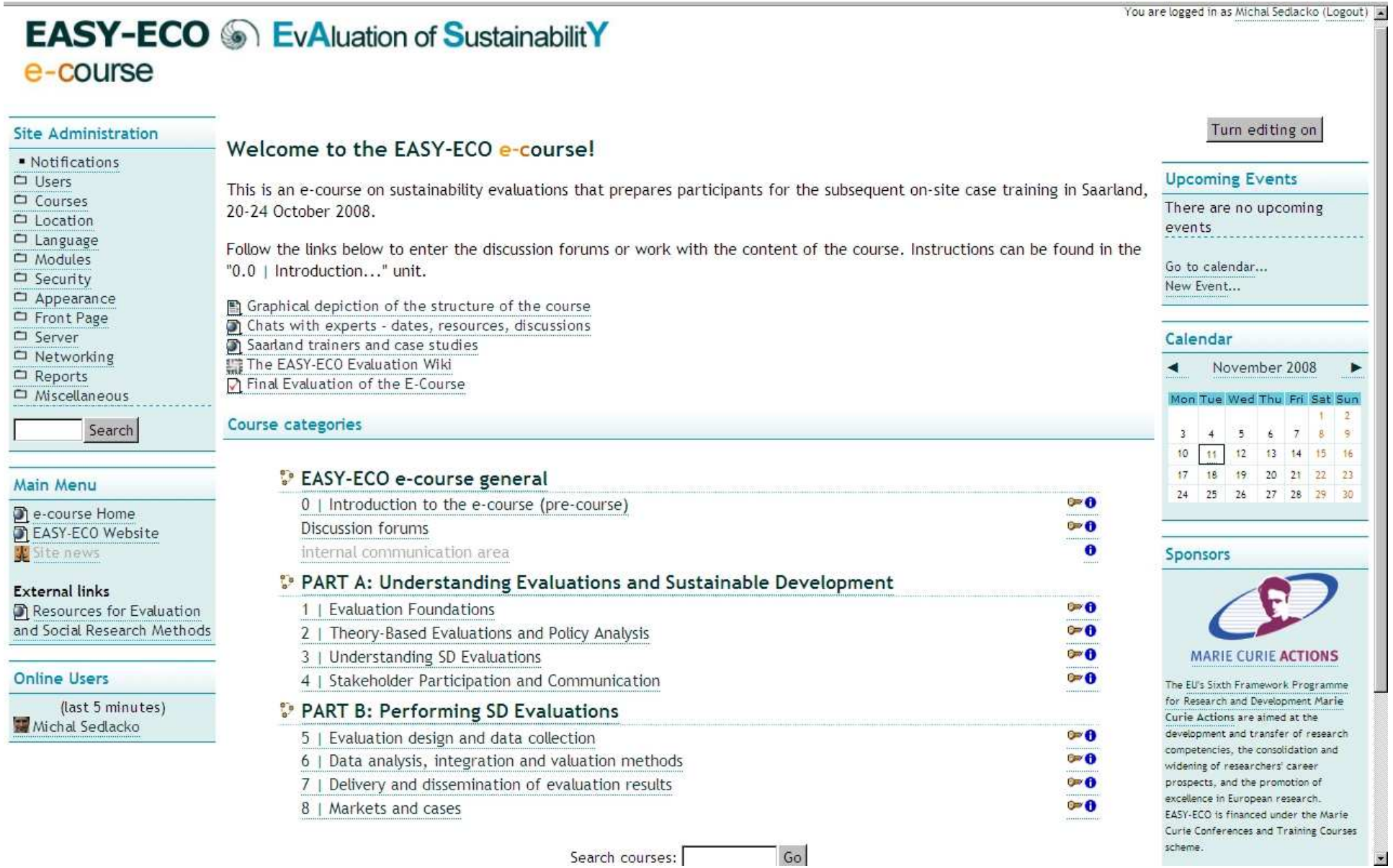
Where does an evaluator get information relevant to his work?

Case studies

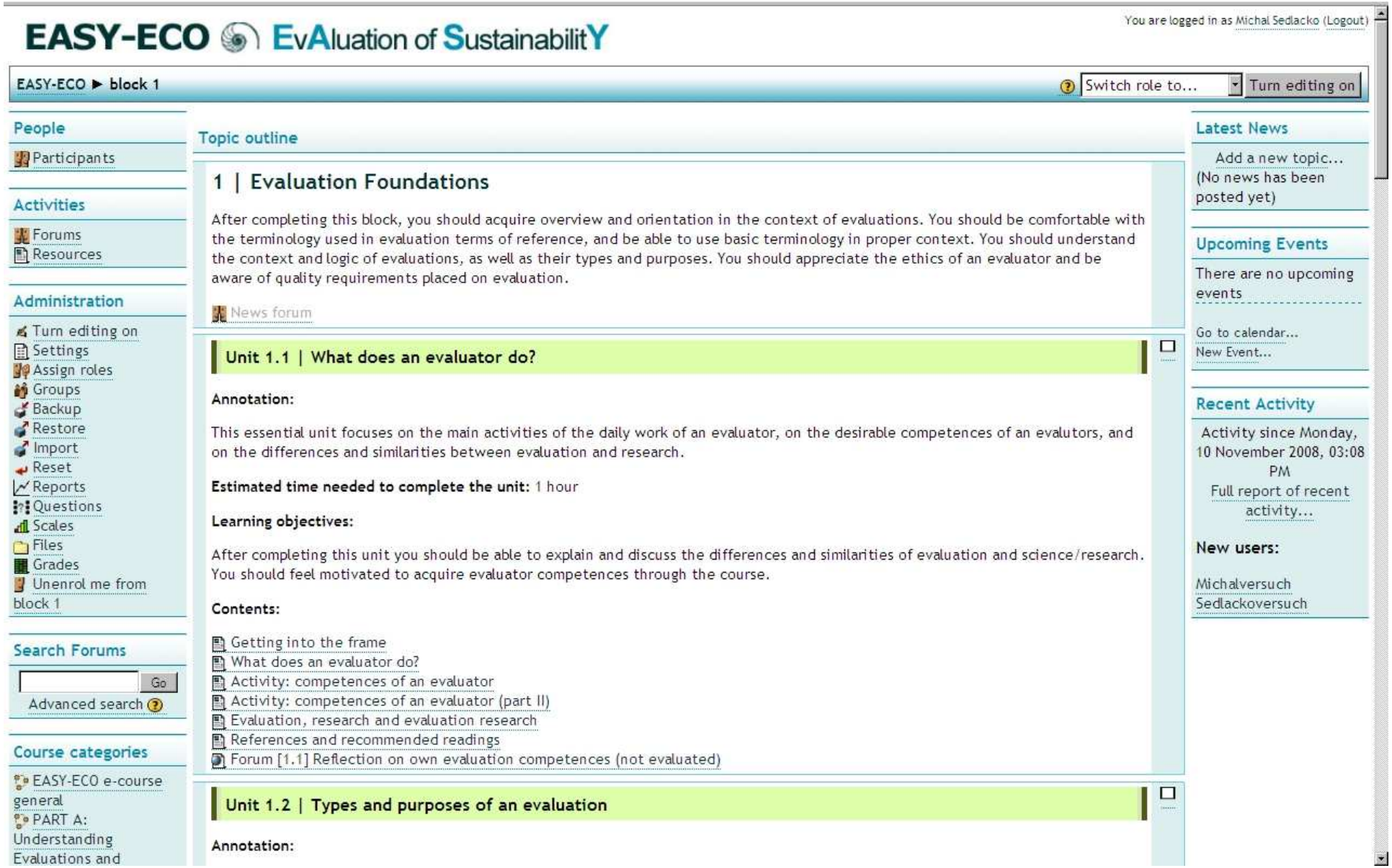
Learning objectives:

- The trainee is able to orient himself/herself in the chosen fields of application of SD evaluations. This means he/she possesses an ability to search for job opportunities, find tenders, identify evaluation partners and draft project proposals.

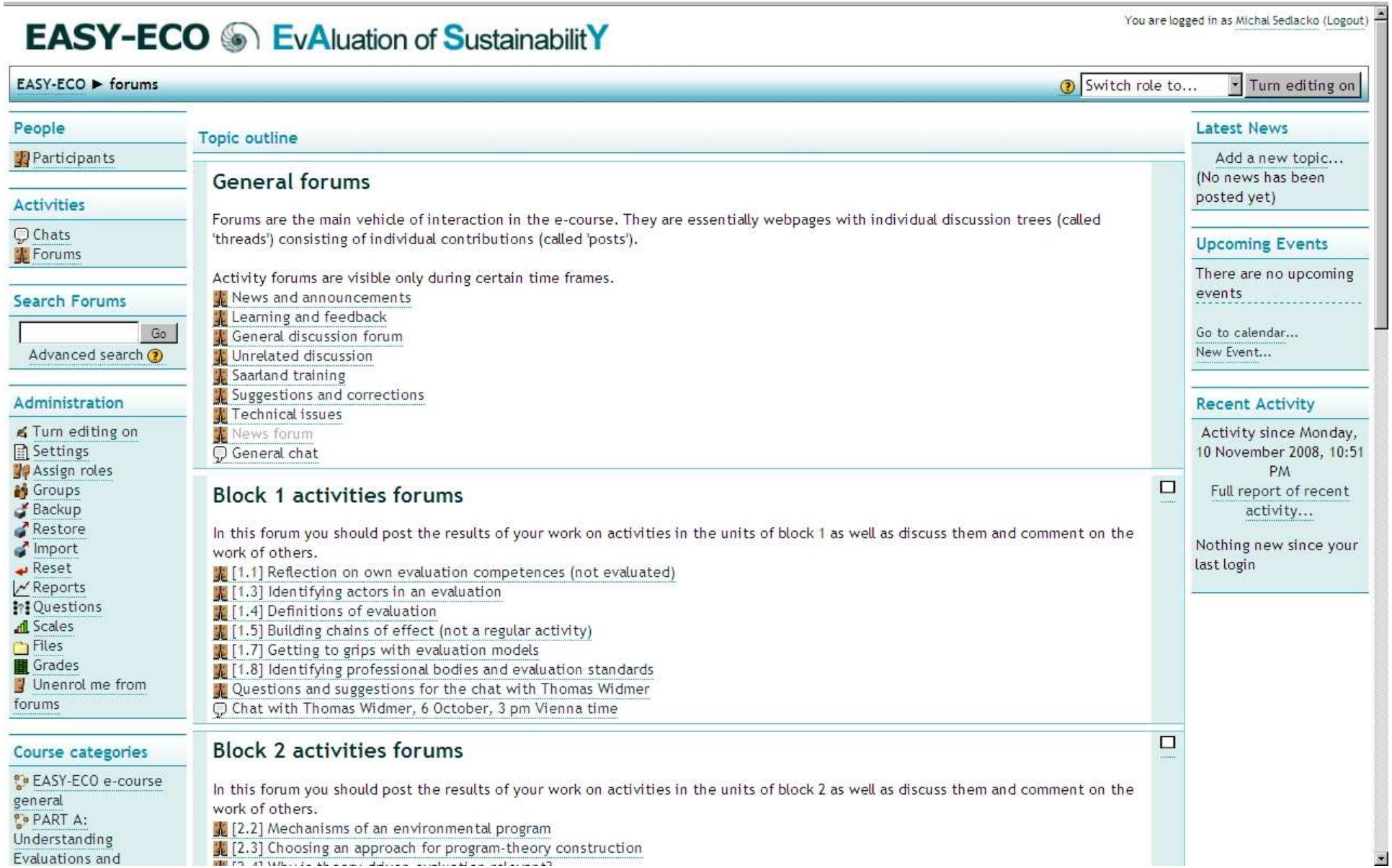
Moodle interface: main screen



Moodle interface: Block 1



Moodle interface: online forums



Moodle interface: a screen from a learning unit

EASY-ECO EvAluation of SustainabilitY

Jump to...

EASY-ECO ► block 1 ► Resources ► Effects of an intervention

Update this Resource

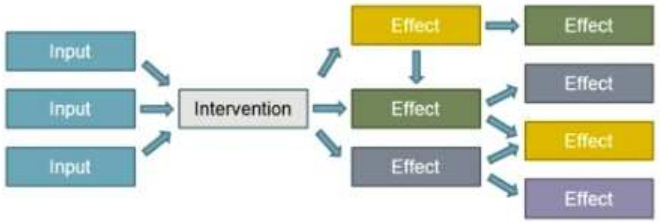
Effects of an intervention

When an intervention is planned, it has to have a certain 'logic'. The planner wants the intervention to achieve certain positive effects, such as decrease of unemployment, improvement of access to safe drinking water or effective institutions for protecting an area valuable for its biodiversity. These are objectives central to the intervention. Often the intervention will have more objectives, such as providing jobs and at the same time improve the quality of water, or provide better transport infrastructure and combat climate change. Objectives however often have a hierarchy of more important **main objectives** and the less important **side objectives**.

The planner has to think about the causal relationships between what can be done (i.e. what will the intervention be, what activities will be performed) and what the expected effects might be. Obviously, besides including **positive effects**, the planner has to take note of **negative effects** as well (increased air pollution, taking of land, need to build additional power plants). Please also note that effects do not usually occur with a 100% probability.

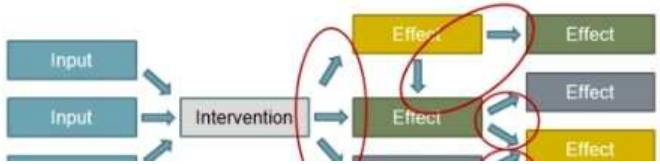
Activities of an intervention, their possible effects and the causal relationships between activities and effects and between effects themselves form the **causal chain** (also called the outcome line and being very close to chain of impacts). If we educate people to behave with higher environmental awareness in their consumer choices (intervention), the positive intended effect should be that they buy more environmentally-friendly products and services (effect 1), which can in turn result in decrease of ecological footprint of households (effect 2) and growing market share of environmental-friendly products (effect 3).

The causal chain is the result of looking at the intervention and at what happens after it **as a process**. Since each activity and effects can have many potential effects and each effect can have a large number of causes (including other effects), a rigorously developed causal chain can become very complex. In our example with consumer education above, effects 2 and 3 are both induced (caused) by effect 1.



The picture above represents a simple example, capturing both multiple effects and multiple causes:

- multiple effects:



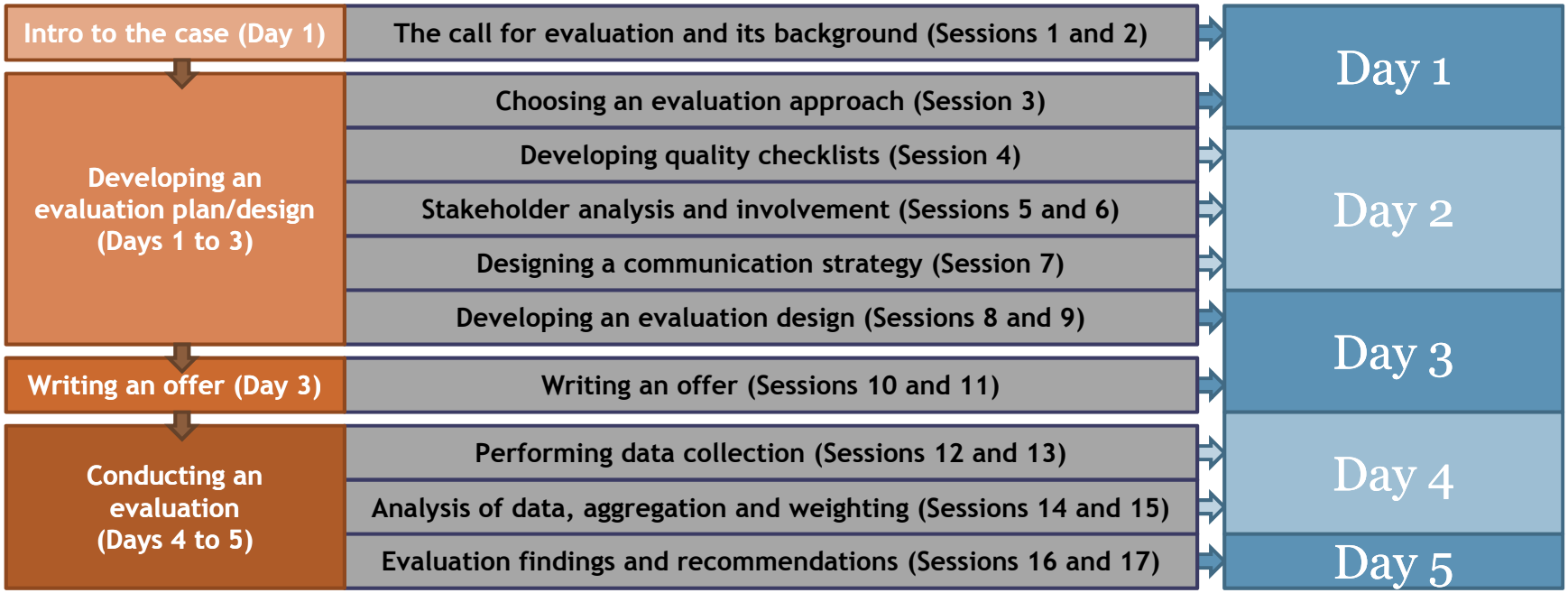
EASY-ECO face-to-face trainings

Face-to-face trainings are 5 days long and are wholly focused on the evaluation case.

The training will provide:

- Learning through working on an actual evaluation case through all its stages and thereby learn to understand various aspects of evaluation
- Understanding of the concept of sustainable development and its implications for different fields of evaluation, especially the challenge of aggregation across different domains
- Soft skills and tacit knowledge (negotiating with the commissioning agents, formulating conclusions etc.), being aware of the relationships between the aims of a set of evaluation questions and their practical realization in the field
- Opportunity to work in an inter-disciplinary group
- Networking opportunities
- Opportunity to reflect on one’s own identity as an evaluator

Face-to-face training structure I



Face-to-face training activities I

- **Presenting the cases:** The case trainers will introduce their case studies to all participants of the on-site training so that all participants get an overview of all three cases taught
- **Analysing the call for tender:** Analyses and discusses the call for tender of the case study in depth; raises awareness of the importance of implicit assumptions on SD for a bid
- **Developing a quality checklist:** Based on the evaluation standards the participants are asked to develop a checklist, to be applied in the upcoming training units
- **Stakeholder involvement:** Gives participants an idea of the different possibilities of stakeholder involvement and makes them familiar with stakeholder interests by playing a role game

Face-to-face training activities II

- **Evaluation Design:** Gives participants an idea about the key issues at stake by collecting questions and by comparing them with the actual evaluation design of the case
- **Offer and budget:** Shows how to define work-packages and calculate them financially; compares the group work with the actual bid and the experiences of the case trainer
- **Handling of data:** Provides participants with hands-on experiences regarding data collection; develops an evaluation design for a particular question and compares it with the case
- **Integrating data/judgement:** Shows how to analyse and integrate data, discusses how to derive solid judgements and how difficult it is to integrate social, economic and environmental data
- **Communication:** Enables participants to see the advantages and disadvantages of different communication strategies by developing a communication strategy for the individual case study

Face-to-face training structure II

	Day 1	Day 2	Day 3	Day 4	Day 5
9:00 – 10:30	Introductions	Developing quality checklists	Developing an evaluation design, choosing methods	Performing data collection	Formulating and delivering evaluation findings and recommendations
Coffee break 10:30 – 11:00					
11:00 – 12:30	Introducing the background of the case study, analysing a call for an evaluation	Stakeholder analysis and involvement strategy	Developing an evaluation design, choosing methods	Performing data collection	Formulating and delivering evaluation findings and recommendations
Lunch 12:30 – 14:00					
14:00 – 15:30	Introducing the background of the case study, analysing a call for an evaluation	Stakeholder analysis and involvement strategy	Writing an offer, including a budget, analysis of the actual offer	Analysis of data, aggregation and weighting	Official conclusion of the training, reflection
Coffee break 15:30 – 16:00					
16:00 – 17:30	Choosing an evaluation approach	Designing a communication strategy	Writing an offer, including a budget, analysis of the actual offer	Analysis of data, aggregation and weighting	Departure