



EvAluation of Sustainability

European COnferences and Training Courses 2008-2010

Information on the Training Courses

2008-12-02



MARIE CURIE ACTIONS

EASY-ECO 2008-2010 is funded by the European Commission's
FP6 Marie Curie Conferences and Training Courses Action



UNIVERSITÀ DEGLI STUDI
DI TRENTO



Who we are

Coordinator:

Research Institute for Managing Sustainability

Vienna University of Economics and Business Administration

www.sustainability.at

Partners:

Saarland University (Germany)

International Institute for Industrial Environmental Economics (IIIEE),

Lund University (Sweden)

University of Basque Country (Spain)

CEU Business School (Hungary)

University of Trento (Italy)

Regional Environmental Center for CEE (Hungary/Czech Republic)

Stockholm Environmental Institute, Tallinn Centre (Estonia)

Université Libre de Bruxelles (Belgium)

our sponsors:



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EASY-ECO Advisory Board



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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:

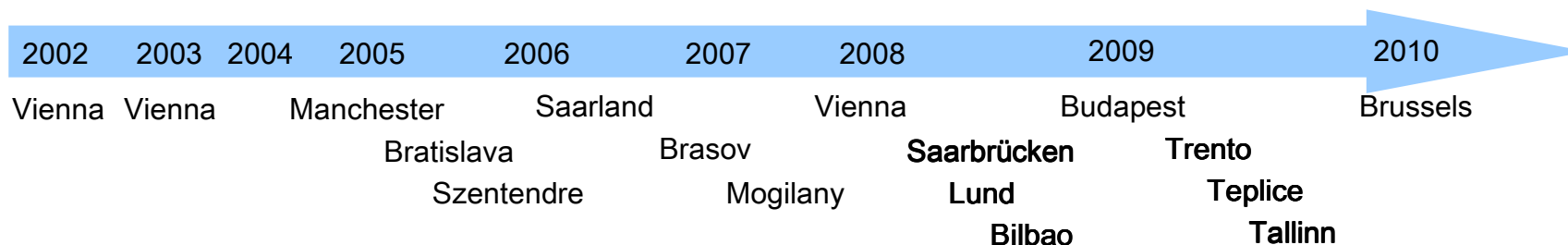
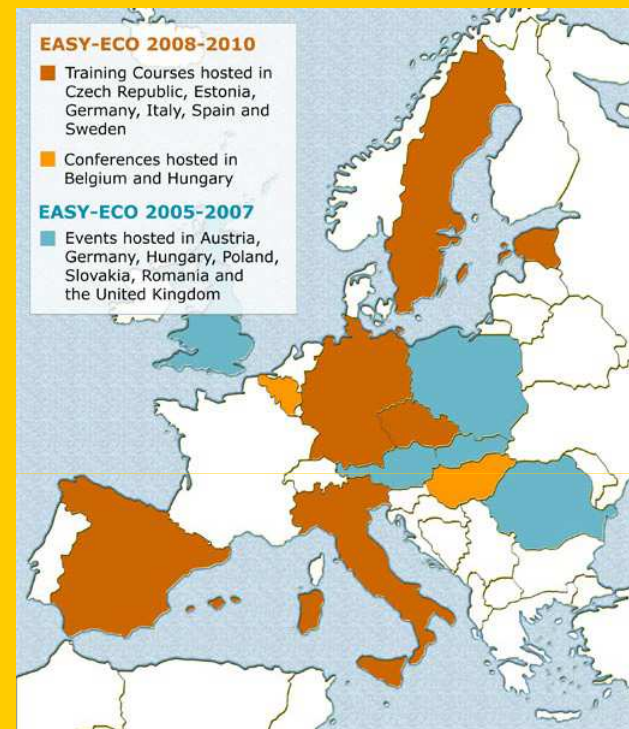
- Setting up a scientifically sound and attractive evaluation design
- Budgeting and managing an evaluation project
- Dealing with conflicting stakeholder interests
- Communicating the results of an evaluation

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 "Governance by Evaluation"	Vienna, Austria	Vienna University of Economics and Business 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 Environmental 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

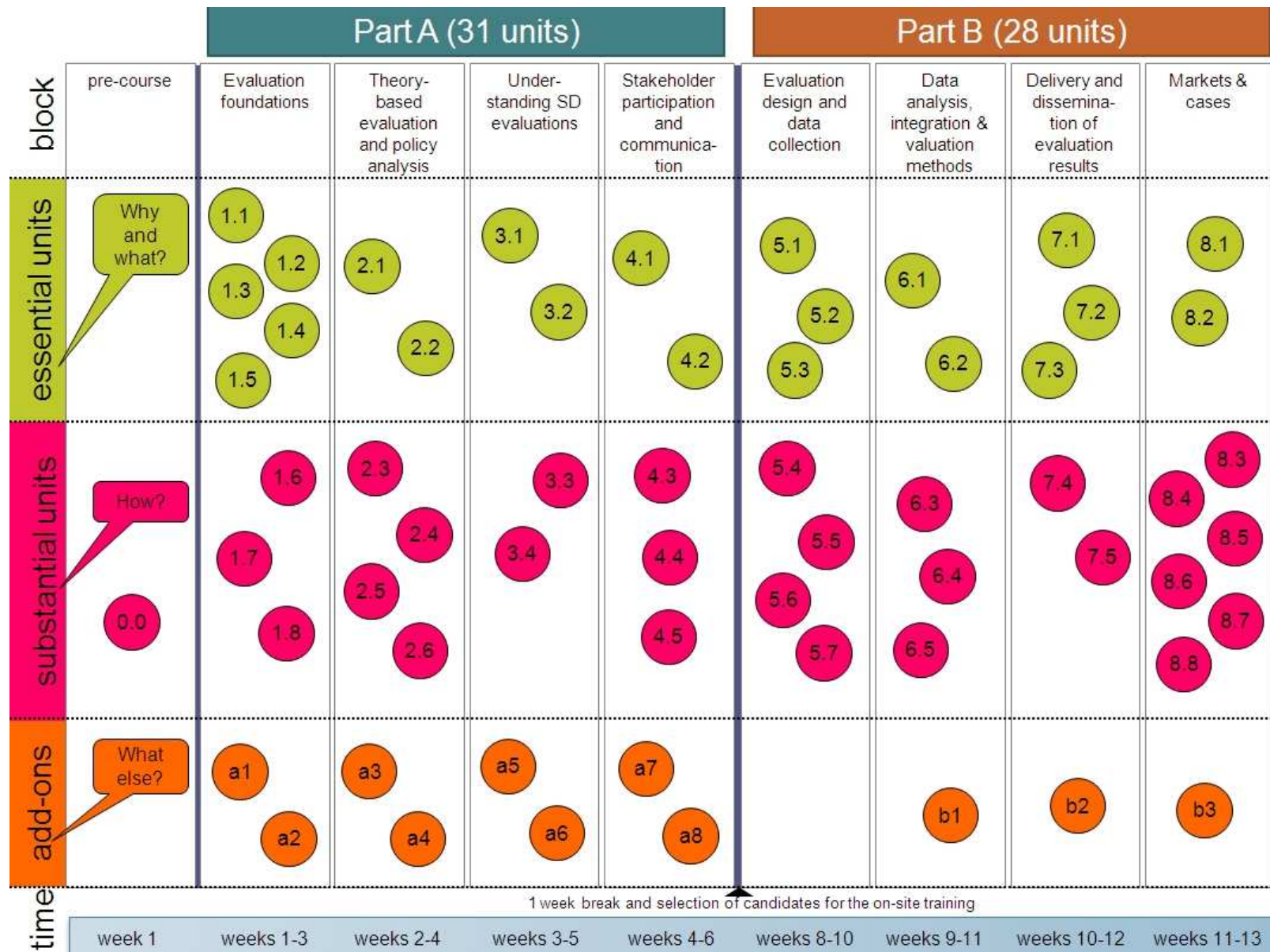
Part A: Understanding Evaluations and Sustainable Development (ca. 30 units)

- 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

EASY-ECO  **EvAluation of SustainabilIT**
e-course

You are logged in as Michal Sedlacko (Logout)

Site Administration

- Notifications
- Users
- Courses
- Location
- Language
- Modules
- Security
- Appearance
- Front Page
- Server
- Networking
- Reports
- Miscellaneous

Welcome to the EASY-ECO e-course!

This is an e-course on sustainability evaluations that prepares participants for the subsequent on-site case training in Saarland, 20-24 October 2008.

Follow the links below to enter the discussion forums or work with the content of the course. Instructions can be found in the "0.0 | Introduction..." unit.

- Graphical depiction of the structure of the course
- Chats with experts - dates, resources, discussions
- Saarland trainers and case studies
- The EASY-ECO Evaluation Wiki
- Final Evaluation of the E-Course

Course categories

Upcoming Events

There are no upcoming events


Go to calendar...

New Event...

Calendar

November 2008

Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Sponsors

MARIE CURIE ACTIONS

The EU's Sixth Framework Programme for Research and Development Marie Curie Actions are aimed at the development and transfer of research competencies, the consolidation and widening of researchers' career prospects, and the promotion of excellence in European research. EASY-ECO is financed under the Marie Curie Conferences and Training Courses scheme.

Main Menu


- e-course Home
- EASY-ECO Website
- Site news

External links

- Resources for Evaluation and Social Research Methods

Online Users

(last 5 minutes)

 Michal Sedlacko

EASY-ECO e-course general

- 0 | Introduction to the e-course (pre-course)
- Discussion forums
- internal communication area

PART A: Understanding Evaluations and Sustainable Development


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

PART B: Performing SD Evaluations

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

Search courses:

Moodle interface: Block 1

EASY-ECO  **EvAluation of SustainabilitY**

You are logged in as Michal Sedlacko (Logout)

EASY-ECO ► block 1

Switch role to... Turn editing on

People
Participants

Activities
Forums
Resources

Administration
Turn editing on
Settings
Assign roles
Groups
Backup
Restore
Import
Reset
Reports
Questions
Scales
Files
Grades
Unenrol me from block 1

Search Forums
 Go
Advanced search ?

Course categories
EASY-ECO e-course
general
PART A:
Understanding
Evaluations and

Topic outline

1 | Evaluation Foundations
After completing this block, you should acquire overview and orientation in the context of evaluations. You should be comfortable with the terminology used in evaluation terms of reference, and be able to use basic terminology in proper context. You should understand the context and logic of evaluations, as well as their types and purposes. You should appreciate the ethics of an evaluator and be aware of quality requirements placed on evaluation.
News forum

Unit 1.1 | What does an evaluator do?

Annotation:
This essential unit focuses on the main activities of the daily work of an evaluator, on the desirable competences of an evaluators, and on the differences and similarities between evaluation and research.
Estimated time needed to complete the unit: 1 hour
Learning objectives:
After completing this unit you should be able to explain and discuss the differences and similarities of evaluation and science/research. You should feel motivated to acquire evaluator competences through the course.
Contents:
Getting into the frame
What does an evaluator do?
Activity: competences of an evaluator
Activity: competences of an evaluator (part II)
Evaluation, research and evaluation research
References and recommended readings
Forum [1.1] Reflection on own evaluation competences (not evaluated)

Unit 1.2 | Types and purposes of an evaluation

Annotation:


Latest News
Add a new topic...
(No news has been posted yet)

Upcoming Events
There are no upcoming events
Go to calendar...
New Event...

Recent Activity
Activity since Monday,
10 November 2008, 03:08
PM
Full report of recent
activity...

New users:
Michalversuch
Sedlackoversuch

Moodle interface: online forums

EASY-ECO  **EvAluation of SustainabilitY**

You are logged in as Michal Sedlacko (Logout)

EASY-ECO ► forums

Switch role to... Turn editing on

People
Participants

Activities
Chats
Forums

Search Forums
 Go
Advanced search ?

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Grades
Unenrol me from forums

Course categories
EASY-ECO e-course general
PART A: Understanding Evaluations and

Topic outline

General forums

Forums are the main vehicle of interaction in the e-course. They are essentially webpages with individual discussion trees (called 'threads') consisting of individual contributions (called 'posts').

Activity forums are visible only during certain time frames.

- News and announcements
- Learning and feedback
- General discussion forum
- Unrelated discussion
- Saartland training
- Suggestions and corrections
- Technical issues
- News forum
- General chat

Block 1 activities forums

In this forum you should post the results of your work on activities in the units of block 1 as well as discuss them and comment on the work of others.

- [1.1] Reflection on own evaluation competences (not evaluated)
- [1.3] Identifying actors in an evaluation
- [1.4] Definitions of evaluation
- [1.5] Building chains of effect (not a regular activity)
- [1.7] Getting to grips with evaluation models
- [1.8] Identifying professional bodies and evaluation standards
- Questions and suggestions for the chat with Thomas Widmer
- Chat with Thomas Widmer, 6 October, 3 pm Vienna time

Block 2 activities forums

In this forum you should post the results of your work on activities in the units of block 2 as well as discuss them and comment on the work of others.

- [2.2] Mechanisms of an environmental program
- [2.3] Choosing an approach for program-theory construction

Latest News

Add a new topic...
(No news has been posted yet)

Upcoming Events


There are no upcoming events

Go to calendar...
New Event...

Recent Activity

Activity since Monday, 10 November 2008, 10:51 PM
Full report of recent activity...
Nothing new since your last login

Moodle interface: a screen from a learning unit

EASY-ECO  **EvAluation of SustainabilY**

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

Update this Resource

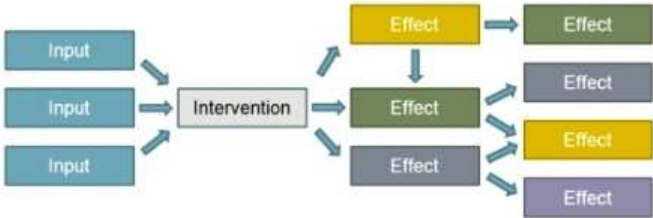
Effects of an intervention

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).

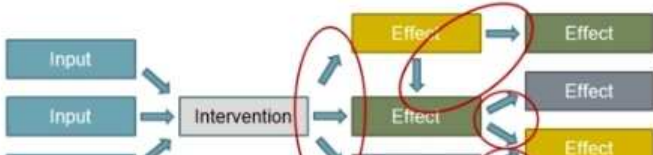
The causal chain is the result of looking at the intervention and at what happens after it **as a process**. Since each activity and effects can have many potential effects and each effect can have a large number of causes (including other effects), a rigorously developed causal chain can become very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



```
graph LR; I1[Input] --> Int[Intervention]; I2[Input] --> Int; I3[Input] --> Int; Int --> E1[Effect]; Int --> E2[Effect]; Int --> E3[Effect]; E1 --> E4[Effect]; E1 --> E5[Effect]; E2 --> E6[Effect]; E3 --> E7[Effect]; E3 --> E8[Effect];
```

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

- multiple effects:



```
graph LR; I1[Input] --> Int[Intervention]; I2[Input] --> Int; Int --> E1[Effect]; Int --> E2[Effect]; Int --> E3[Effect]; E1 --> E4[Effect]; E1 --> E5[Effect]; E2 --> E6[Effect]; E3 --> E7[Effect]; E3 --> E8[Effect];
```



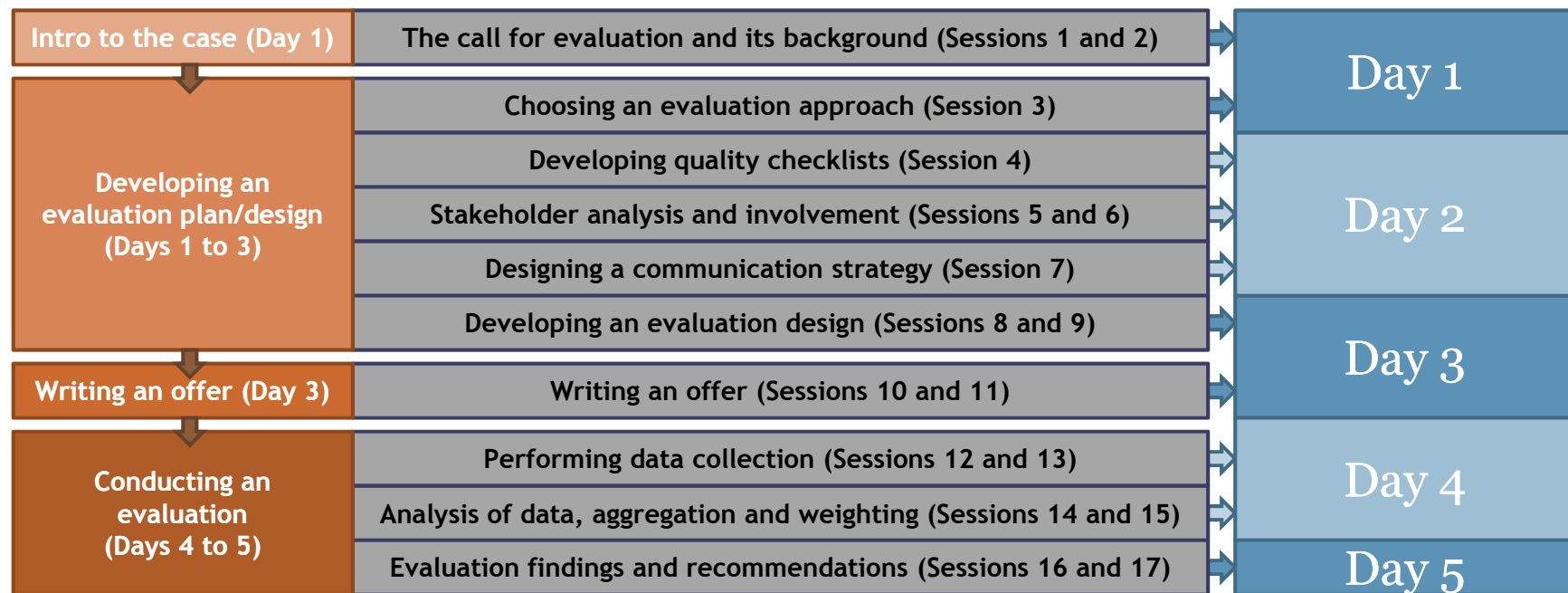
EASY-ECO face-to-face trainings

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