EVAL-INNO

FOSTERING EVALUATION COMPETENCIES IN RESEARCH, TECHNOLOGY AND INNOVATION IN THE SEE REGION

RTDI EVALUATION TRAINING
SOFIA, 18-22 MARCH 2013

AGENDA
AND
RULES FOR EXPENSES COVERED

Project funded under the South East Europe Transnational Cooperation Programme

Agenda

		Monday	Tuesday	Wednesday	Thursday	Friday
Evaluators	9.00 – 10.00	Introduction to the course and overview of RTDI evaluations **(Dr. Nikos Sidiropoulos, Greece)**	RTDI System Evaluation. A case study **(Prof. Teodora Georgieva, Bulgaria)**	Evaluation Platforms. The Austrian example **(Mag. Dr. Klaus Schuch, Austria)**	Bibliometrics and patent analysis **(Prof. Djuro Kutlaca, Serbia)**	Expert panels, focus group, participatory evaluation approaches **(Mag. Dr. Klaus Schuch, DI Martin Felix Gajdusek, Austria)**
	10.00 – 11.00	History of RTDI evaluation, definitions, types, levels, timing of evaluations **(Dr. Nikos Sidiropoulos, Greece)**	A Structural Funds Operational Programme Evaluation. A case study, **(Prof. Teodora Georgieva, Dr. Todor Galev, Bulgaria)**	Evaluating Economic Impacts **(Dr Milos Besic, Montenegro)**	RTDI Indicators **(Prof. Lena Tsipouri, Greece)**	Foresight and technology assessment **(Prof. Djuro Kutlaca, Serbia)**
	Coffee Break					
	11.15 – 12.15	Design of evaluation-logic charts **(Mag. Peter Kaufmann, Austria)**	Programme Evaluation. A case study **(Prof. Djuro Kutlaca, Serbia)**	Evaluation of social impact of research – **(Dr. Todor Galev, Bulgaria)**	Questionnaires, Interviews, and field/case studies **(Prof. Djuro Kutlaca, Serbia)**	Network Analysis **(Dr. Todor Galev, Bulgaria)**
	12.15 – 13.15	Rules and ethics for evaluators and commissioning institutes **(Mag. Peter Kaufmann, Austria)**	Research Institute Evaluation. A case study **(Dr. Balázs Borsi, Hungary)**	Overview of evaluation basic tools and methodologies **(Prof. Lena Tsipouri, Greece)**	Benchmarking Analysis **(Dr. Balázs Borsi, Hungary)**	Additionality. Control Groups **(Prof. Lena Tsipouri, Greece)**
	Lunch					
	14.15 – 15.15	Competence of evaluators and awarding authorities **(Dr. Nikos Sidiropoulos, Greece)**	University Evaluation. A case study – **(Prof. Teodora Georgieva, Bulgaria)**	real-case based group exercises	real-case based group exercises	real-case based group exercises
	15.15 – 16.15	Utilisation of evaluation results - Usefulness of evaluation **(Mag. Peter Kaufmann, Austria)**	Ministry/Research Agency/ Awarding authority Evaluation. A case study **(Dr. Balázs Borsi, Hungary)**	real-case based group exercises	real-case based group exercises	real-case based group exercises

		Monday	Tuesday	Wednesday	Thursday	Friday
policy-delivery and programme owners	9.00 – 10.00	Introduction to the course and overview of RTDI evaluations **(Dr. Nikos Sidiropoulos, Greece)**	RTDI System Evaluation. A case study **(Prof. Teodora Georgieva, Bulgaria)**	Evaluation Platforms. The Austrian example **(Mag. Dr. Klaus Schuch, Austria)**	Constructing the Terms of References **(Mag. Dr. Klaus Schuch, DI Martin Felix Gajdusek, Austria)**	
	10.00 – 11.00	History of RTDI evaluation, definitions, types, levels, timing of evaluations **(Dr. Nikos Sidiropoulos, Greece)**	A Structural Funds Operational Programme Evaluation. A case study **(Prof. Teodora Georgieva, Dr. Todor Galev, Bulgaria)**	Evaluating Economic Impacts **(Dr Milos Besic, Montenegro)**	Constructing the Terms of References, **(Mag. Dr. Klaus Schuch, DI Martin Felix Gajdusek, Austria)**	
	Coffee Break					
	11.15 – 12.15	Design of evaluation-logic charts **(Mag. Peter Kaufmann, Austria)**	Programme Evaluation. A case study **(Prof. Djuro Kutlaca, Serbia)**	Evaluation of social impact of research **(Dr. Todor Galev, Bulgaria)**	The EVAL-INNO Platform and Databases of Evaluators **(DI Martin Felix Gajdusek, Austria)**	
	12.15 – 13.15	Rules and ethics for evaluators and commissioning institutes **(Mag. Peter Kaufmann, Austria)**	Research Institute Evaluation. A case study **(Dr. Balázs Borsi, Hungary)**	Overview of evaluation basic tools and methodologies **(Prof. Lena Tsipouri, Greece)**	Monitoring of evaluations from the perspective of the awarding authorities **(Mag. Dr. Silvo Korez)**	
	Lunch					
	14.15 – 15.15	Competence of evaluators and awarding authorities **(Dr. Nikos Sidiropoulos, Greece)**	University Evaluation. A case study **(Prof. Teodora Georgieva, Bulgaria)**	RTDI Public Procurement Legislation in ERDF and IPA countries **(Prof. Lena Tsipouri, Greece)**	real-case based group exercises	
	15.15 – 16.15	Utilisation of evaluation results - Usefulness of evaluation **(Mag. Peter Kaufmann, Austria)**	Ministry/Research Agency/ Awarding authority Evaluation. A case study **(Dr. Balázs Borsi, Hungary)**	RTDI Public Procurement Legislation in ERDF and IPA countries **(Prof. Lena Tsipouri, Greece)**	real-case based group exercises	

Exploring the training modules' table

Monday is a joint day for both target groups. RTDI evaluation hermeneutics and terminology and the role, functions, service-delivery processes and ethics based on the standards produced are in the focus of the first day.

Tuesday and Wednesday morning are joint days for both target groups. An overview of evaluation theory is provided followed by a reflection of general evaluation aspects and basic tools. A comparison of evaluation methods is provided. Different types of evaluation are presented and discussed.

On *Wednesday afternoon, Thursday and Friday*, the two groups will split:
- The <u>evaluators</u> will attend the courses on selected evaluation methodologies (in-depth) and the practical real-case based group exercises
- The <u>officers</u> (programme owners) will attend the courses on public procurement (tendering) issues and practical real-case based group exercises

The evaluators' course contains 24 topics spread over 5 days, also 6 hours of group exercise are foreseen.

The policy delivery and programme owners' course contains 20 topics spread over 4 days, also two hours for group exercise are foreseen.

Group exercises

The trainers will prepare a group exercise based on every topic teached. The group exercises will be referred to real cases (i.e. the design of methodology to evaluate a research programme providing all the needed data).

The facilities

Coffee will be provided for coffee breaks, lunch will be provided at all training days.

A dinner (social event) will be organised in order to bring together the trainers and the attendees (i.e. on Tuesday or Wednesday)

Accommodation will be provided for the attendees depending on their travel schedule up to:
- 6 nights starting on Sunday (for the evaluators)
- 5 nights starting on Sunday (for the owners)

The EVAL-INNO bag

The trainees will receive upon their arrival the EVAL-INNO bag. The bag will include:
- ❑ A folder including the agenda of the courses, a notepad and pen
- ❑ EVAL-INNO evaluation standards booklet (in English or where available in own language)
- ❑ A USB-stick containing the relevant training materials
- ❑ The training seminars' booklet including information on the topics taught.
- ❑ The trainings' evaluation sheet

- ❑ EVAL-INNO project folder
- ❑ Informative material regarding the host city, institution, other useful information.

Target groups of the training course:
The training will be offered to two target groups:
- - **Potential or current evaluation experts.** Researchers and employees of scientific organisations are in general expected to apply for this group.
- - **Programme owners.** Experts from managing authorities and governmental agencies are expected to sign in the second group of "programme owners".

Please, check the training description and agenda to determine your relevant group!

The training mainly targets:
- - Junior experts that would like to gain theoretical and practical knowledge on RTDI evaluation methods and best practices.
- - Senior experts that would like to strengthen their knowledge in order to become in the future more deeply involved in RTDI evaluations of RTDI institutions, science and innovation policies and programmes.

Eligibility of participants:
Participants should have country of residence or employment either in Bulgaria, Romania, Moldova or Greece.
Participants (of both groups) should work fully or part-time at any type of organisation that is engaged in developing and/or promoting RTDI. Examples of such organisations are ministries, chambers of commerce, state agencies, innovation councils, scientific unions, industrial associations, clusters, science parks, incubators, laboratories, centres of research, universities etc.

Please note:
University students are not eligible to participate as trainees in the course, unless they are fully or part-time employed at university. For the target group of evaluators, university staff is eligible to participate as trainees, in order to increase their knowledge on RTDI evaluation e.g. for the purpose of the university.

Number of trainees:
A total of 30 trainees are expected to participate in the training (~12-15 trainees from Romania, Moldova and Greece in addition to ~12-15 from Bulgaria)

Nomination process:
The final selection will be based on the principal first-come, first-enrolled (FCFE) whereby the requests of the potential trainees are attended to in the order that they arrived, without other biases or preferences.

Project leader:
Centre for Social Innovation (ZSI), Austria (https://www.zsi.at/)

Organizers:
Applied Research and Communications Fund (http://www.arcfund.net) (local organiser)
National and Kapodistrian University of Athens (UoA) (http://en.uoa.gr/) (co-organiser)

Expenses covered

Expenses covered:
- • International travel expenses (additional instructions for obtaining the tickets will be provided to the nominated participants).

- Accommodation in a hotel in Sofia (reservations will be made by the host organisation - ARC Fund).
- Lunches on the days of the training sessions will be served.
- Training materials will be provided.

Expenses NOT covered:
- Per diems and personal expenses.

Please note: Bulgarian participants are **not eligible** for hotel and travel. The expenses, covered for the Bulgarian participants include the training sessions, training materials and lunches.

Accommodation will be provided for the attendees according to travel schedule:
- For the Evaluators training group: 6 nights starting on Sunday.
- For the Managing authorities/programme owners/ training group: 5 nights starting on Sunday.

VISA issues
Participants requiring VISA should contact the organisers to receive a personal invitation. The participants shall then present the invitation to the respective embassy in order to obtain VISA. Please, provide us with number of passport and any additional information needed to be specified on the invitation. Please, also specify if any additional announcement to the Bulgarian Embassy is needed.

Cancellation policy

Foreign attendees (non-Bulgarian residents) are required to sign a Letter of Commitment to confirm their participation for the whole duration of the RTDI evaluation training course.
In case of cancellation / non-attendance, foreign attendees will be liable and should compensate the host institution for all costs that have occurred due to the cancellation – bought airplane / bus tickets, payment of the first night in the booked hotel, or similar compensation required according to the hotel policy, printed training materials, etc.

Application
If you would like to apply for the RTDI evaluation training in Sofia, please return the filled in registration form to: evaladmin@online.bg

Note: By filling in the registration form you declare your commitment to participate in all sessions of the training course (5 days for Group 1: Potential or current evaluation experts or 4 days for Group 2: Programme owners). Please, also note that certificates will be provided only to the participants that were present in 90% of the training sessions and the exercises.

EVAL-INNO website registration
Applicants are advised to register at the EVAL-INNO website http://www.eval-inno.eu/ , that will give the possibility to contribute to its content and receive the EVAL-INNO Newsletter.

Further information
For more information: http://www.eval-inno.eu/index.php/training-opportunities
RTDI Evaluation Standards: http://www.eval-inno.eu/index.php/publications/guidelines-and-standards/43-rtdi-evaluation-standards-published