



European Social Fund

Programme for Employability, Inclusion and Learning 2014 – 2020

Evaluation Plan



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Introduction

This evaluation plan for the ESF Programme for Employability, Inclusion and Learning (PEIL) 2014-2020 has been prepared by the Managing Authority (MA) in accordance with the relevant regulatory requirements and submitted to the Programme Monitoring Committee (PMC) for approval.

The purpose of Operational Programme (OP) evaluations, as set out in the Common Provisions Regulation (EU) 1303/2013 (CPR), is “to improve the quality of the design and implementation of programmes, as well as to assess their effectiveness, efficiency and impact”. The impact of the overall OP will be evaluated in the light of the ESF’s mission, in relation to the targets set for Ireland under Europe 2020 and, having regard to the size of the programme, in relation to GDP and unemployment in the programme area, where appropriate (Art 54, CPR).

The European Commission (EC) Guidance Document on Monitoring and Evaluation of European Cohesion Policy: European Social Fund¹ sets out how the overall approach to evaluation should be linked to the intervention logic and in particular to the specific objectives and longer-term results to be achieved by a programme. Acknowledging the potential influence of external factors on longer-term results, the Guidance notes that one of the primary tasks of evaluation is to identify effects which can be directly attributed to the ESF.

The CPR (Art 56) requires MAs to ensure evaluations, including evaluations to assess effectiveness, efficiency and impact, are carried out for each Programme on the basis of the evaluation plan and that these evaluations are appropriately followed-up. At least once during the programming period an evaluation shall assess how support from the ESF has contributed to the objectives for each priority. The CPR also requires ex-ante and ex-post evaluations to be undertaken on OPs (Arts 55 & 57), while Article 114 (3) provides that the EC will undertake the ex-post evaluation.

Specifically in relation to the Youth Employment Initiative (YEI), Member States are required to undertake two evaluations of the effectiveness, efficiency and impact of the joint support by the ESF and the YEI, including the implementation of the Youth Guarantee. The first evaluation was completed in December 2015 with the second being due for completion by end 2018 (Art 19 ESF Regulation 1304/2014).

¹ Available at: http://www.esf.ie/en/eu_regulations_2014-2020.aspx

Content of the Evaluation Plan

In order to strengthen the contribution of evaluations to the effectiveness of the programmes, Article 114 of the CPR requires MAs to design evaluation plans within one year of the adoption of the OP for submission to the PMC. The purpose of the plan is both to improve the quality of the evaluations carried out during the programming period and to enhance the management of the OP, by strategically planning and scheduling evaluations.

This evaluation plan provides an overall framework for the evaluation of PEIL 2014-2020, taking account of the regulatory requirements and available guidance, including the EC Guidance Document on Evaluation Plans². The main objectives of the evaluation plan are to:

- Improve the quality of evaluations through proper planning, including through identification and collection of necessary data (Art. 54.1 CPR),
- Provide a framework to plan evaluations on effectiveness, efficiency and impact (Art. 56 CPR),
- Ensure that resources for funding and managing the evaluations are appropriate (Art. 54.2) and proportionate (in terms of budget/resources),
- Enable informed programme management and policy decisions on the basis of evaluation findings,
- Ensure that evaluations provide inputs for annual implementation and progress reports, and
- Facilitate the compilation of the summary report on the findings of evaluations undertaken to be submitted to the Commission by end-2022.

Accordingly, this evaluation plan addresses both the possible data needs to address the requirement to evaluate the effectiveness, efficiency and impact of the OP as well as the proposed approach to evaluations of the OP, their timing, the methods and any resource issues arising.

The evaluation plan will be reported on by the MA to the PMC at each meeting of the PMC. All evaluations undertaken will be examined by the PMC and follow-up actions and evaluation responses prepared by the MA will be monitored by the PMC. This evaluation oversight will be complemented by the monitoring reports provided to the PMC on all programme activities, which will address the progress achieved by financial and non-financial indicators. Similarly all evaluations will be submitted to the EC and the Annual Implementation Reports will include updates on the evaluation plan activities.

² http://ec.europa.eu/regional_policy/sources/docoffic/2014/working/evaluation_plan_guidance_en.pdf

Overview of PEIL 2014-2020

The ESF Programme for Employability, Inclusion and Learning (PEIL) 2014-2020 was agreed with the EU Commission in February 2015 and formally launched in April 2015. The Operational Programme (OP) contains a total budget of €1.153 billion, comprising EU funding of €611m (ESF €542.4m + YEI funding of €68m) and Exchequer funding of €542.4m.

The YEI is a new EU initiative, delivered using the ESF support framework, to tackle the high levels of youth unemployment which is available for use in those regions where youth unemployment levels exceeded 25% during the reference year of 2012. The funding targets young people under the age of 25 who are **not in employment, education, or training (NEETs)**.

The PEIL concentrates on three key thematic objectives identified for ESF support and targets specific investment priorities within these thematic objectives (priority axes) as follows, with the YEI being a separate priority axis:

Thematic Objective/ Priority Axis	Total Financial Allocation	Investment Priorities
Promoting sustainable and quality employment and supporting labour mobility	€326m	Access to employment for job-seekers and inactive people, including the long-term unemployed and people far from the labour market, also through local employment initiatives and support for labour mobility;
Promoting social inclusion, combating poverty and any discrimination	€388m	Active inclusion, including with a view to promoting equal opportunities and active participation, and improving employability; Combating all forms of discrimination and promoting equal opportunities;
Investing in education, training and vocational training for skills and lifelong learning	€215m	Improving the quality and efficiency of, and access to, tertiary and equivalent education with a view to increasing participation and attainment levels, especially for disadvantaged groups;

		Enhancing equal access to lifelong learning for all age groups in formal, non-formal and informal settings, upgrading the knowledge, skills and competences of the workforce, and promoting flexible learning pathways including through career guidance and validation of acquired competences.
YEI	€204m	Sustainable integration into the labour market of young people, in particular those not in employment, education or training, including young people at risk of social exclusion and young people from marginalised communities, including through the implementation of the Youth Guarantee
Total	€1,153m [^]	

[^]includes €20m Technical Assistance.

While the regulations require at least 20% of ESF funding to be invested in social inclusion activities, Ireland has set a more ambitious target with almost 36%, or €194 million, of the ESF allocation being available for reducing poverty and social exclusion. The specific objectives and expected results are set out in Annex I, while the priority level outputs are set out in Annex II.

Role of the Managing Authority

Responsibility for evaluation is vested in the MA which is responsible for:

- Preparing the evaluation plan for approval by the PMC,
- Ensuring that evaluations are undertaken in accordance with the evaluation plan and regulatory requirements,
- Ensuring the existence of an administrative framework for the implementation of the evaluation plan, with appropriate skills and competences available,
- Ensuring that the monitoring data on financial and physical indicators, required for monitoring and evaluation, is collected and available,
- Providing resources for evaluation purposes from the Technical Assistance budget,
- Preparing Terms of Reference³ in order to obtain the necessary expertise to undertake the required evaluations,
- Ensuring, as far as possible, that evaluation aims and quality standards are observed,

³ The Terms of Reference will be defined in the Request for Tender

- Submitting evaluation results to the PMC and the European Commission, including a summary report on evaluation findings by end 2022,
- Monitoring the follow-up to recommendations from evaluation reports in consultation with relevant Intermediate Bodies and submitting evaluation responses to the PMC for consideration,
- Effecting any required modifications to the programme that emerge from the evaluation process, and
- Publishing the evaluation plan, evaluations undertaken and disseminating learning to all key actors.

In line with the regulatory requirement that evaluations be carried out by experts who are functionally independent of the MA, all evaluations will be commissioned from external experts by competitive tender, in compliance with national and EU guidelines and directives on public procurement. Evaluations will be overseen by the ESF Managing Authority and will be financed from the budget for Technical Assistance of the OP.

The MA will bring forward any OP amendment proposals in line with evaluation recommendations to the PMC.

Evaluation Quality

The quality of an evaluation centres largely on the precision of its initial Terms of Reference, which will be defined within each Request for Tender. The Terms of Reference define the objectives of an evaluation, the role and responsibilities of the evaluator and the evaluation client, the duration of the contract and the resources allocated to the project.

The evaluation activities included in this evaluation plan will be carried out in accordance with best practice and will take account of the standards provided in Annex 2 of the EC Guidance Document on Evaluation Plans⁴. Among the key standards to be observed are the following:

- Responsibility for the co-ordination of evaluation activities will be assigned to the Head of the MA,
- All relevant stakeholders will be meaningfully involved in evaluation activities,
- Evaluations will be planned and conducted in a transparent manner,

⁴ http://ec.europa.eu/regional_policy/sources/docoffic/2014/working/evaluation_plan_guidance_en.pdf

- Evaluations will be carried out in a timely manner to enable the findings and recommendations to feed into decisions on the design and modification of activities,
- A steering group may be set up for each evaluation to advise on the terms of reference and to assess the quality of the completed work,
- The principle of avoidance of conflicts of interest will be respected, and
- Independent evaluators will be commissioned to undertake evaluations.

Evaluators will be expected to draw appropriate conclusions in relation to each of the analytical tasks set out in the terms of reference and the quality⁵ of evaluation reports will be judged on the basis of:

- Openness of the evaluation process,
- Adequacy of the evaluation design,
- Reliability of the data used,
- Results supported by evidence and rigorous analysis,
- Appropriateness of the analysis and credibility of the findings,
- Clarity of presentation of conclusions, and
- Utility of the recommendations.

Evaluation Resources

Sufficient financial resources have been provided within the Technical Assistance Priority to facilitate the programme of evaluations. The MA will ensure that the resources necessary for carrying out evaluations, organising the production and gathering of the necessary data and use of the various types of information available from the 2014-2020 e-Cohesion IT System⁶, will be provided.

Within the MA itself, an Evaluations Officer has been appointed with primary responsibility for leading the implementation of this Evaluation Plan. This Officer, and other staff of the MA as appropriate, will undertake relevant training to ensure the MA's evaluation activities are appropriate and effective.

The MA will also continue to liaise closely with the European Commission, Member States and other relevant bodies, including through active attendance at meetings of the Commission's ESF Evaluation Partnership, to ensure best practice is shared and

⁵ This draws on the Quality Standards provided in the Commission Working document No. 5: Indicative Guidelines on Evaluation Methods (EU Commission, 2006)

⁶ A national IT system is being developed for the ESI Funds [including the ESF] for the 2014-20 period. This system is currently not in place and guidance/training on the operation of the 2014-2020 IT system will be provided to Intermediate Bodies and Beneficiaries as part of the system's ongoing development and implementation.

adopted. The MA will also seek to leverage the expertise of colleagues across the Department of Education and Skills who have responsibility for Data and Knowledge Management, Statistics, and Research and Evaluation, to inform the design and implementation of the evaluation activities described in this plan.

With regard to the potential establishment of a steering group for each evaluation, which is one of the standards set out in the Commission Guidance referred to above, it is the intention of the MA to establish a standing Steering Group to assist in the oversight of the evaluation activities set out in this plan.

Monitoring and Data Collection

Monitoring of PEIL 2014-2020 will be undertaken through a series of common indicators, with a further set of indicators for YEI operations, all of which are set out in Annex I and II of the ESF Regulation (1304/2013) (Annex III and IV of this document).

All Intermediate Bodies and Beneficiaries are required to collect data at operation level to meet the requirements of Annex III of EC Delegated Regulation 480/2014⁷ including data on individual participants, where applicable.

All data for PEIL 2014-2020 will be collected, cleansed and transferred to the new IT System. The specification for the system ensures the system will be capable of storing all data required by the regulations to be collected.

These datasets will be critical because they will provide both the fundamental basis for monitoring the progress of the OP and the basic data required for evaluations. They can be used to link to other datasets to obtain further information on the outcomes of the Programmes.

The MA will work with Intermediate Bodies to ensure the reliability and consistency of the data. This will involve providing training to Intermediate Bodies and Beneficiaries on the operation of the new IT system and the MA will also provide relevant guidance documents to IBs and Beneficiaries.

Article 125 verifications undertaken by the MA and audits undertaken by the ESF Audit Authority will check the evidence supporting the indicators. In addition to this, when producing Annual Implementation Reports, the MA will check the data

⁷<http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014R0480&from=EN>

for any anomalies, e.g. any decreases between reporting periods or unexplained trends.

The Administrative Agreement⁸ agreed with each Intermediate Body includes a general requirement that all Intermediate Bodies co-operate with programme evaluations, as appropriate.

Annual Implementation Report

In accordance with Articles 50 and 111 of the CPR, from 2016 the MA will submit an Annual Implementation Report (AIR) to the European Commission on the implementation of the programme in the previous financial year. These reports are one of the key elements of the monitoring of each OP.

AIRs set out key information on the implementation of the programme and its priorities by reference to the financial data, common and programme-specific indicators and quantified target values, including changes in the value of result indicators where appropriate.

The data transmitted relate to values for indicators for fully implemented operations and also, where possible, having regard to the stage of implementation, for selected operations. AIRs also contain a synthesis of the findings of all evaluations of the programme that have become available during the previous financial year, any issues which affect the performance of the programme, and the measures taken, and the results of information and communication measures carried out under the approved communications strategy.

The AIRs also assess the implementation of actions to take into account the horizontal principles, the role of the partners in the implementation of the programme and report on support used for climate change objectives.

The 2016 AIR also set out actions taken to fulfil *ex ante* conditionalities not fulfilled at the time of adoption of the programme.

Beginning from the AIR to be submitted in 2017, progress on achieving the milestones defined in the performance framework will be reported on.

⁸ Outlines the basis on which the ESF Managing Authority will support approved measures under PEIL 2014-2020. The primary purpose of the Administrative Agreement is to set out the arrangements for the performance of delegated functions by Intermediate Bodies.

The AIR to be submitted in 2019 and the final implementation report for the Funds will, in addition to the information and assessment referred to above, include information on, and assess progress towards, achieving the objectives of the programme and its contribution to achieving the Union strategy for smart, sustainable and inclusive growth.

The AIRs must be examined and approved by the PMC before they are sent to the EC. Approved AIRs including aggregated data will be available publicly on the ESF website.

***Ex Ante* Evaluation**

Article 55 of the CPR sets out the requirements for the mandatory *ex ante* evaluation of OPs. Apart from its principal role in supporting and improving the quality of programming, the ex-ante evaluation also plays a useful role in verifying baselines for targets and understanding data needs for future evaluations. The independent ex-ante evaluation of PEIL 2014-2020 was conducted by Fitzpatrick Associates Economic Consultants, in conjunction with AECOM, and the report was sent to the European Commission, together with the proposed OP, in February 2015.

The five key components of the ex-ante evaluation were as follows:

- Programme strategy
- Indicators, monitoring and evaluation
- Consistency of financial allocations
- Contribution to Europe 2020 strategy
- Strategic Environmental Assessment

The evaluators considered Ireland's experience of extreme economic recession and stagnation to be the most pressing and immediate context for ESI support for 2014-2020 and addressing its marked negative social and labour market impact to be the priority for ESF focus. Other long-standing challenges identified are the promotion of equal opportunities, the empowerment of the long-term disadvantaged, heightening educational attainment levels, tackling skills shortages and addressing poverty. The evaluators considered that the draft proposals for the PEIL 2014-2020 responded broadly to these priorities and to the main development needs facing Ireland.

However, important determinants of the OP's impact and long-term legacy were considered likely to include-

- its flexibility to changing circumstances and priorities,

- its focus on verifiable, objective and real impacts at every level,
- its ability to provide genuine additionality and added value to mainstream policy including through the adoption of innovative approaches, and
- its scope to learn from and respond effectively to implementation challenges and lessons at all stages.

Consequently the evaluators advocated that a level of flexibility be maintained throughout the OP's implementation to enable it to respond to the likely changing needs of economic recovery over the programming period (such as upskilling low-skilled employees, apprenticeships etc). A very significant mid-term review was also recommended in this context.

The evaluation noted the significant data collection and evaluation challenges , particularly in establishing comprehensive, robust, and integrated systems of collecting underlying data and reporting on financial and activity-based progress, on results and outcomes, and on ultimate impacts capable of facilitating effective evaluation.

Planned Evaluations

The evaluations to be undertaken shall, in accordance with Article 19 (6) of the ESF Regulation 1304/2013 assess “the effectiveness, efficiency and impact of joint support from the ESF and the specific allocation for YEI including the implementation of the Youth Guarantee”. Any findings/recommendations arising from the evaluations will be clear and based on information gathered during the course of the evaluation. As required, there will be an evaluation to assess how support from the Funds has contributed to the objectives of each priority.

Article 19 (6) of Regulation (EU) No 1304/2013 requires that at least twice during the programming period, an evaluation of the implementation of YEI shall be undertaken. The first evaluation was completed in December 2015 and the second evaluation is to be completed by 31 December 2018.

The European Commission focuses on two categories of impact evaluations (where “impact” refers to the change that can be credibly attributed to an intervention) to assess the extent to which the objectives under each priority axis have been achieved. Theory-based impact evaluations answer the questions why and how an intervention works. This approach mainly produces a qualitative estimate of the impacts. Counterfactual impact evaluations answer how much of the change is due to the intervention and for whom.

According to the EC Guidance Document on Monitoring and Evaluation⁹, the method of evaluation shall be decided on a case-by-case basis. A range of methods are available and there is no one 'best' method. Managing Authorities must choose the evaluation method that meets their needs.

Programme of Evaluations

The table below outlines the evaluations which are required, under the relevant Regulations, to be carried out by the MA over the course of the implementation of the OP. However, clearly, new evaluation needs may emerge during that time and, for that reason, the list below should be regularly reviewed by the PMC. The MA may also conduct *ad hoc* evaluations as required during that time.

While the table below refers only to those evaluations for which the MA is directly responsible, the MA will also seek to support the evaluation activities of relevant bodies where those activities are, in the view of the MA, particularly relevant to the efficient and effective implementation of the OP. It is in that capacity that the MA has agreed to co-finance, with the Department of Housing, Planning, Community and Local Government, a research project to analyse the strategies, interventions and outcomes for young NEETs under SICAP, which is being procured by POBAL and will be completed in Q3 2017.

Relevant bodies are invited to liaise with the MA to identify relevant research activities which could benefit from ESF co-financing.

OP Priority	Approach	Subject & Rationale	Methods	Timeframe
P4 –YEI	Impact Evaluation	<ol style="list-style-type: none"> 1. Review of the YEI 2. Efficiency – how resources are being utilised 3. Effectiveness/performance to date – review of delivery 4. Review of Indicators to determine impact 5. Conclusions and Recommendations 	Mixed methods: Desk Research, Interviews, Surveys	Completed
Entire OP	Mid-Term Performance Evaluation	<ol style="list-style-type: none"> 1. Review of External Developments 2. Continued Relevance of Priorities/Objectives 	Will be determined by Evaluator	Q4 2018

⁹ http://ec.europa.eu/regional_policy/sources/docoffic/2014/working/wd_2014_en.pdf

		<ol style="list-style-type: none"> 3. Assess how support from the Funds has contributed to the objectives of each priority 4. Efficiency, Effectiveness & Impact of each Activity to date 5. Review of Indicators 6. Evaluation of Horizontal Principles 7. Conclusions and Recommendations 		
P4 -YEI	Impact Evaluation	<ol style="list-style-type: none"> 1. Review of the YEI 2. Efficiency – how resources are being utilised 3. Effectiveness/performance to date – review of delivery 4. Review of Indicators to determine impact 5. Conclusions and Recommendations 	Will be determined by Evaluator	31 December 2018
P1, P2, & P3	Impact Evaluation	<ol style="list-style-type: none"> 1. Review of the activities within P1, P2 & P3 2. Efficiency – how resources are being utilised 3. Effectiveness/performance to date – review of delivery 4. Review of Indicators to determine impact 5. Conclusions and Recommendations 	Will be determined by Evaluator	Q4 2019

YEI Evaluation 2015

In 2015, an evaluation of the operation of the YEI was undertaken to assess “the effectiveness, efficiency and impact of joint support from the ESF and the specific allocation for YEI including the implementation of the Youth Guarantee”, in line with Article 19(6) of the ESF Regulation 1304/2013. The evaluation involved reviews of how resources were being utilised, of delivery and of indicators to determine impact.

The ESF MA has prepared a response paper on this evaluation for approval by the Committee, setting out the main findings and recommendations of the evaluation and proposed follow-up actions. This paper is set out in Annex V.

Evaluation of Horizontal Principles

In accordance with Article 7 of the CPR, there is a requirement that Member States ensure equality between men and women and the integration of a gender perspective, including in the monitoring and evaluation of the programmes. In addition, Article 7 specifies that the programme authorities must take appropriate steps to prevent any discrimination on any of the specified grounds. Article 8 of the CPR requires that the objectives of the funds shall be pursued in line with the principle of sustainable development.

It is the intention of the MA to include a review of the integration of the Horizontal Principle commitments throughout the OP as part of the Mid-Term Performance Evaluation.

***Ex Post* Evaluation**

Article 114 (1) requires the EC to carry out *ex post* evaluations in close cooperation with relevant MAs.

The purpose of the *ex post* evaluation shall be to obtain a view of the programming period as a whole. It will examine the effectiveness and efficiency of the Funds and their impact on economic, social and territorial cohesion and their contribution to the Union priorities of smart, sustainable and inclusive growth. It will identify the factors that contributed to the success or failure of the implementation of the OP and identify good practice.

In accordance with Article 57 the *ex post* evaluation shall be finished by 31 December 2024. The *ex post* evaluation will be facilitated by evaluations of Member States and the European Commission during the programming period, especially by the Member States' summary of evaluations and main outputs and results during the period submitted to the European Commission by end 2022.

Other Evaluations

The MA will ensure that all relevant evaluation work which is carried out outside the specific scope of this plan is brought to the attention of relevant stakeholders. The MA will also seek to liaise with the bodies carrying out these complementary evaluations, in order both to provide assistance and to ensure that such evaluations can positively affect the implementation of the Operational Programme.

In this regard, the MA is aware of the following evaluations which are of particular relevance to the OP:

Priority	Scheme	Body	Notes	Timeframe
1	ICT Skills Conversion Courses	DES	To complete a review of the current national ICT skills Action Plan 2014-2018 and publish a revised Plan.	Q4 2016
2, 4	Youthreach	SOLAS	SOLAS has commissioned the ESRI to conduct an independent evaluation of the Youthreach programme.	2018
2, 4	SICAP	DRCD	<p>ESRI conducted an evaluation of the LCDP/SICAP programme (An Exploration of (Area-based) Social Inclusion and Community Development Training Programmes in Ireland).</p> <p>The aim of the study was to –</p> <ul style="list-style-type: none"> ○ examine the extent to which training provision delivered under LCDP/SICAP varies across programme areas and the extent of accreditation, ○ estimate how training expenditure and the duration of training courses are distributed across programme types, ○ analyse how the distribution of provision relates to the SICAP goals, ○ measure the geographical variation in the distribution of provision by population, deprivation index, programme objectives and costs, and ○ assess the extent to which the provision delivered under the programme could and should be subject to evaluation in terms of both individual-level outcomes 	Completed Q4 2016

			and community-level impacts.	
2, 4	SICAP	DRCD	The SICAP Evaluation research project is overseen by a steering group with representation from the DRCD and Local Government, Pobal, the ESRI and an independent academic. This research programme commenced in Q4 of 2016 with an initial programme level research topic. This research project will continue into 2017 with preliminary findings available by late May. Concurrently, a second stream of the research programme is scheduled for commencement in Q1 2017, looking at project level outcomes and effectiveness. It is not expected that the full research programme will have reached conclusion until Q2 2018, as elements of the evaluation research will be summative (ie after the programme has finished) in nature.	To be completed by Q2 2018
3	Third-Level Access - SAF	HEA	The HEA commissioned this review of the SAF in order to determine whether the policies, guidelines and practice relating to the Fund are fit for current and future purpose.	Completed Q3 2016
3	Third-Level Access - FSD	HEA	The HEA commissioned this review of the FSD in order to determine whether the policies, guidelines and practice relating to the Fund are fit for current and future purpose.	Completed Q4 2017
3	BTEI	SOLAS	An independent evaluation of the Back to Education Initiative (BTEI) is to be commissioned by the SOLAS in 2018. This activity, which is delivered through the ETBs, accounts for almost 10% of	2018

			allocated funding under PEIL 2014-2020, so this evaluation will be of particular interest to stakeholders.	
4	JobBridge	DSP	An evaluation of the JobBridge scheme was conducted by consultants Indecon on behalf of the Department of Social Protection during 2016. This evaluation, through a mixed-methods study, provided a qualitative assessment of employer and participant experience with JobBridge and their perspectives on the future of JobBridge, as well as an economic evaluation, the primary focus of which was a counterfactual impact evaluation to provide an assessment of the differential progression impact (to employment, to further education or training or to another non-jobseeker status) for jobseeker participants compared to a control group of non-participants.	Completed Q4 2016
4	Back to Work Enterprise Allowance	DSP	This review – <ul style="list-style-type: none"> ○ examined the current validity of the BTWEA objectives against current and emerging priorities, ○ evaluated the recent performance of the programme, ○ evaluated the nature and sustainability of the employment/self-employment created, ○ identified the factors (within the BTWEA) giving rise to success or failure of supported enterprises, 	December 2016

			<ul style="list-style-type: none"> ○ determined the efficiency and effectiveness of the current arrangements, management information and performance indicators and where similarities are identified, ○ benchmarked with similar schemes in other jurisdictions. 	
4	Momentum	SOLAS	As part of the implementation of the 2014-2017 round of Momentum, a programme evaluation has been conducted. This evaluation examined issues relating to the recruitment of participants into the programme, the management of the programme and the programme outcomes.	2016
n/a	VTOS	SOLAS	An independent evaluation of the Vocational Training Opportunities Scheme (VTOS) is to be commissioned by SOLAS in early-2017. While this activity is not included within the Operational Programme, it was formerly included in the HCIOP 2007-2013 round and the findings of this evaluation may of relevance to other activities.	2017

Communication of Evaluations

As noted earlier, evaluations and their follow-up will be examined by the PMC, which may make observations to the MA regarding evaluation of the overall Programme.

Following approval from the PMC, all evaluations shall be sent to the European Commission in electronic format.

The MA will consult with the relevant Intermediate Bodies as to how they propose to address the findings and recommendations arising from evaluations. The MA will

then submit a response paper to the PMC for approval, addressing all the recommendations. The PMC will exercise its discretion whether to implement the response as proposed or to vary it.

In accordance with Article 114 (2), by 31 December 2022 the MA will submit to the European Commission a report summarising the findings of evaluations carried out during the programming period and the main outputs and results of the operational programme, providing comments on the reported information.

Final evaluation reports will be uploaded to the SFC2014. This will allow the Commission to provide examples of methodological approaches used in different fields to the evaluation community, to analyse the evidence produced and as far as possible build a repository of evidence for policy-making.

In addition, and as noted above, the MA will bring to the attention of the PMC any other relevant evaluation work which is completed during the programming period.

A key part of the evaluation plan is to ensure that findings are disseminated as widely as possible, in the interests of transparency and to promote the emergent learning. One of the main purposes of carrying out an evaluation is to improve the way things are done and the MA will ensure that all stakeholders, decision makers and organisations working on ESF co-financed activities are aware of the evaluation work and will also publish all relevant evaluation reports on the ESF website.

Annex I: Specific Objectives and Expected Results

Priority 1: Promoting the attainment of sustainable and quality employment through relevant upskilling measures and supporting labour mobility.	Specific Objectives	To raise the level and market-relevance of job-seekers' skills, in particular for LTU and young, through further/higher education and training opportunities, and by facilitating their labour mobility
	Expected Results	Unemployed persons or other job-seekers, including long-term and young unemployed persons, obtain employment or progress to education or training
Priority 2: Promoting Social Inclusion and combating discrimination in the labour market	Specific Objectives	To engage unemployed and/or inactive persons, including young people, from disadvantaged groups and in or at risk of poverty and social exclusion in a process of learning and development in order to ultimately increase their employability
	Expected Results	Persons from marginalised groups, including young people at risk, persons with disabilities and offenders, participate in social inclusion, re-integration or employability programmes.
Priority 3: Investing in Education, Training and Life Long Learning with a view to upskilling and re-skilling the labour force	Specific Objectives	To enable disadvantaged and disabled persons/ students to access and continue/remain in higher education
	Expected Results	Disadvantaged and disabled persons/students access and continue/remain in tertiary education.
Priority 4: Youth Employment Initiative	Specific Objectives	To Raise the skills and education levels of people eligible for support under YEI, by providing education, training, work experience and/or work opportunities, including support for self-employment
	Expected Results	More young people, in particular those who are not in employment, education or training, aged under 25 progress to education, training or employment.
Priority 5: Technical Assistance	Specific Objectives	<p>Effective implementation of the Operational Programme</p> <p>Effective communication of funding opportunities and programme achievements</p> <p>Effective evaluation of the programme</p> <p>Effective capacity building for staff of the Managing Authority and Intermediate Bodies</p> <p>Establishment and operation of an effective computerised system for data exchange and e-cohesion system</p>
	Expected Results	Results are not required to be specified under Article 96(2)(c)

Annex II: Priority-Level Output Indicators

Priority 1: Promoting the attainment of sustainable and quality employment through relevant upskilling measures and supporting labour mobility.

ID	Indicator	Measurement Unit	Fund	Category of Region	Target Value	Data Source	Reporting Frequency
1.1.1	The number of participants on training and upskilling programmes for the unemployed or jobseekers.	Number of Participants	ESF	More Developed	135,090	Monitoring by SOLAS / ETBs/ HEA	Annually
1d	Number of Jobs & Advice Fairs and Dialog (EURES) projects taking place	Number of projects	ESF	More Developed	24	DSP	Annually
<25yr	The number of youth (<25yrs) participants on training and upskilling programmes for the unemployed or jobseekers	Number of participants	ESF	More Developed	16,894	Monitoring by SOLAS, ETBs, HEA	Annually
LTU	The number of LTU participants on training and upskilling programmes for the unemployed or jobseekers	Number of participants	ESF	More Developed	38,721	Monitoring by SOLAS, ETBs, HEA	Annually

Priority 2: Promoting Social Inclusion and combating discrimination in the labour market

ID	Indicator	Measurement Unit	Fund	Category of Region	Target Value	Data Source	Reporting Frequency
2.1.1	The number of participants from disadvantaged groups on social inclusion employability programmes, including personal development towards employability programmes.	Number of Participants	ESF	More Developed	71,896	Monitoring by SOLAS ETBs DJE DCELG	Annually
2.1b	The number of youths (<25 yrs) participants from disadvantaged groups on social inclusion employability programmes, including personal development towards employability programmes	Number of participants	ESF	More Developed	67,807	Monitoring by DCELG, SOLAS ETBs, DJE DSP	Annually
ID	Indicator	Measurement Unit	Fund	Category of Region	Target Value	Data Source	Reporting Frequency
2.2.1	The number of participants from disadvantaged groups on social inclusion	Number of Participants	ESF	More Developed	8,790	Monitoring by DJE	Yearly

	employability programmes, including personal development towards employability programmes.						
2.2b	Number of Equality mainstreaming projects targeting public administrations or public services at national, regional or local level	Number of projects	ESF	More Developed	30	Equality Authority	Annually

Priority 3: Investing in Education, Training and Life Long Learning with a view to upskilling and re-skilling the labour force

ID	Indicator	Measurement Unit	Fund	Category of Region	Target Value	Data Source	Reporting Frequency
3h	Number of LTU disadvantaged and/or disabled persons assisted in accessing and continuing/remaining in third level education	Number of disadvantaged and/or disabled persons	ESF	More developed	10,917	Monitoring by HEA and Colleges	Annually
3j	Number of disadvantaged and/or disabled persons assisted in accessing and continuing/remaining in third level education	Number of disadvantaged and/or disabled persons	ESF	More developed	185,296	Monitoring by HEA and Colleges	Annually
3.2.1	The number of participants with low education levels on further education/ training programmes.	Number of Participants	ESF	More Developed	526,600	Monitoring by SOLAS ETBs	Annually
3.2b	The number of LTU participants with low education levels on further education/training programmes	Number participants	ESF	More Developed	147,308	Monitoring by DES, SOLAS, ETBs	Annually

Priority 4: Youth Employment Initiative

ID	Indicator	Measurement Unit	Fund	Category of Region	Target Value	Data Source	Reporting Frequency
4.1.1	The number of YEI eligible participants on training/ upskilling/personal development towards employability and work environment (including supports for self-employed) programmes/projects.	Number of YEI eligible participants	YEI	More Developed	32,670	Monitoring by DSP SOLAS ETBs DCELG DJE	6 months

Annex III: Extract from Regulation 1304/2013 – ESF Regulation

Common output and result indicators for ESF investments

(1) Common output indicators for participants

"Participants" ⁽¹⁾ refers to persons benefiting directly from an ESF intervention who can be identified and asked for their characteristics, and for whom specific expenditure is earmarked. Other persons shall not be classified as participants. All data shall be broken down by gender.

The common output indicators for participants are:

- unemployed, including long-term unemployed*,
- long-term unemployed*,
- inactive*,
- inactive, not in education or training*,
- employed, including self-employed*,
- below 25 years of age*,
- above 54 years of age*,
- above 54 years of age who are unemployed, including long-term unemployed, or inactive not in education or training*,
- with primary (ISCED 1) or lower secondary education (ISCED 2)*,
- with upper secondary (ISCED 3) or post-secondary education (ISCED 4)*,
- with tertiary education (ISCED 5 to 8)*,
- participants who live in jobless households*,
- participants who live in jobless households with dependent children*,
- participants who live in a single adult household with dependent children*,
- migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)**,
- participants with disabilities**,
- other disadvantaged**.

The total number of participants will be calculated automatically on the basis of the output indicators. These data on participants entering an ESF supported operation shall be provided in the annual implementation reports as specified in Article 50(1) and (2) and Article 111(1) of Regulation (EU) No 1303/2013.

- homeless or affected by housing exclusion*,
- from rural areas* ⁽²⁾.

(1) Managing authorities shall establish a system that records and stores individual participant data in computerised form as set out in Article 125 (2) (d) of Regulation (EU) No 1303/2013. The data processing arrangements put in place by the Member States shall be in line with the provisions of Directive 95/46/EC of the European Parliament and of the Council of 24 October 1995 on the protection of individuals with regard to the processing of personal data and on the free movement of such data (OJ L 281, 23.11.1995, p. 31), in particular Articles 7 and 8 thereof. Data reported under the indicators marked with * are personal data according to Article 7 of Directive 95/46/EC. Their processing is necessary for compliance with the legal obligation to which the controller is subject (Article 7(c) of Directive 95/46/EC). For the definition of controller, see Article 2 of Directive 95/46/EC. Data reported under the indicators marked with ** are a special category of data according to Article 8 of Directive 95/46/EC. Subject to the provision of suitable safeguards, Member States may, for reasons of substantial public interest, lay down exemptions in addition to those laid down in Article 8(2) of Directive 95/46/EC, either by national law or by decision of the supervisory authority (Article 8(4) of Directive 95/46/EC).

(2) The data shall be collected at the level of smaller administrative units (local administrative units 2), in accordance with Regulation (EC) No 1059/2003 of the European Parliament and of the Council of 26 May 2003 on the establishment of a common classification of territorial units for statistics (NUTS) (OJ L 154, 21.6.2003, p. 1).

The data on participants under the two above indicators will be provided in the annual implementation reports as specified in Article 50(4) of Regulation (EU) No 1303/2013. The data shall be collected based on a representative sample of participants within each investment priority. Internal validity of the sample shall be ensured in such a way that the data can be generalised at the level of investment priority.

(2) Common output indicators for entities are:

- number of projects fully or partially implemented by social partners or non-governmental organisations,
- number of projects dedicated at sustainable participation and progress of women in employment,
- number of projects targeting public administrations or public services at national, regional or local level,
- number of supported micro, small and medium-sized enterprises (including cooperative enterprises, enterprises of the social economy).

These data shall be provided in the annual implementation reports as specified in Article 50(1) and (2) and Article 111(1) of Regulation (EU) No 1303/2013.

(3) Common immediate result indicators for participants are:

- inactive participants engaged in job searching upon leaving*,
- participants in education/training upon leaving*,
- participants gaining a qualification upon leaving*,
- participants in employment, including self-employment, upon leaving*,
- disadvantaged participants engaged in job searching, education/ training, gaining a qualification, in employment, including self-employment, upon leaving**.

These data shall be provided in the annual implementation reports as specified in Article 50(1) and (2) and Article 111(1) of Regulation (EU) No 1303/2013. All data shall be broken down by gender.

(4) Common longer-term result indicators for participants are:

- participants in employment, including self-employment, six months after leaving*,
- participants with an improved labour market situation six months after leaving*,
- participants above 54 years of age in employment, including self-employment, six months after leaving*,
- disadvantaged participants in employment, including self-employment, six months after leaving**.

These data shall be provided in the annual implementation reports as specified in Article 50(5) of Regulation (EU) No 1303/2013. They shall be collected based on a representative sample of participants within each investment priority. Internal validity of the sample shall be ensured in such a way that the data can be generalised at the level of investment priority. All data shall be broken down by gender.

Annex IV: Extract from Regulation 1304/2013 – ESF Regulation

Result indicators for the Youth Employment Initiative

These data shall be provided in the annual implementation reports as specified in Article 50(1) and (2) of Regulation (EU) No 1303/2013 and in the report to be submitted in April 2015 as specified in Article 19(3) of this Regulation. All data shall be broken down by gender.

(1) Common immediate result indicators for participants

"Participants" (1) refers to persons benefiting directly from a YEI intervention who can be identified and asked for their characteristics, and for whom specific expenditure is earmarked.

The immediate result indicators are:

- Unemployed participants who complete the YEI supported intervention*,
- Unemployed participants who receive an offer of employment, continued education, apprenticeship or traineeship upon leaving*,
- Unemployed participants who are in education/training, gain a qualification, or are in employment, including self-employment, upon leaving*,
- Long-term unemployed participants who complete the YEI supported intervention*,
- Long-term unemployed participants who receive an offer of employment, continued education, apprenticeship or traineeship upon leaving*,
- Long-term unemployed participants who are in education/training, gain a qualification, or are in employment, including self-employment, upon leaving*,
- Inactive participants not in education or training who complete the YEI supported intervention*,
- Inactive participants not in education or training who receive an offer of employment, continued education, apprenticeship or traineeship upon leaving*,
- Inactive participants not in education or training who are in education/training, gain a qualification, or are in employment, including self-employment, upon leaving*.

(2) Common longer-term result indicators for participants

The longer-term result indicators are:

- Participants in continued education, training programmes leading to a qualification, an apprenticeship or a traineeship six months after leaving*,
- Participants in employment six months after leaving*,
- Participants in self-employment six months after leaving*.

The data for longer-term result indicators shall be collected based on a representative sample of participants within each investment priority. Internal validity of the sample shall be ensured in such a way that the data can be generalised at the level of investment priority.

(1) Managing authorities shall establish a system that records and stores individual participant data in computerised form as set out in Article 125 (2) (d) of Regulation (EU) No 1303/2013. The data processing arrangements put in place by the Member States must be in line with the provisions of Directive 95/46/EC, in particular Articles 7 and 8 thereof. Data reported under the indicators marked with * are personal data according to Article 7 of Directive 95/46/EC. Their processing is necessary for compliance with the legal obligation to which the controller is subject (Article 7(c) of Directive 95/46/EC). For the definition of controller, see Article 2 of Directive 95/46/EC. Data reported under the indicators marked with ** are a special category of data according to Article 8 of Directive 95/46/EC. Subject to the provision of suitable safeguards, Member States may, for reasons of substantial public interest, lay down exemptions in addition to those laid down in Article 8(2) of Directive 95/46/EC, either by national law or by decision of the supervisory authority (Article 8(4) of Directive 95/46/EC).

Annex V: Response to YEI Mid-Term Evaluation (December 2015)

Mid-Term Impact Evaluation of YEI in Ireland

Response of the PEIL OP Monitoring Committee

Background

Article 19.6 of the ESF Regulation 1304/2013 requires that an evaluation of the effectiveness, efficiency and impact of the implementation of YEI be conducted at least twice during the programming period. The deadline for the completion of the first evaluation was 31 December 2015.

In October 2015 the ESF MA engaged an independent research consultancy firm, Gauge NI to conduct this evaluation. The final report of the evaluation was submitted to the MA in December 2015 and was subsequently forwarded to the European Commission.

The methodology adopted by Gauge NI was shaped by the Guidance on Evaluation of the Youth Employment Initiative, prepared by DG EMPL, and involved desk research, face to face meetings with relevant stakeholders, electronic surveys and telephone interviews.

The purpose of this paper is to summarise the main findings and recommendations arising from the evaluation, to outline the relevant bodies' observations on those findings and recommendations, and to set out proposed actions for follow-up.

Main Findings

The evaluation report notes the relatively early stage of implementation of many of the activities encompassed by the review, which meant it was not feasible to answer all of the core questions regarding effectiveness, efficiency and impact.

Specific, detailed findings in respect of each YEI activity encompassed by the review are set out in sections 3 to 8 of the main report. Overall findings are set out in section 9 of the report and are summarised below.

In terms of *implementation*, the report notes that –

- YEI implementation used a range of existing activation programmes, each of which is “aligned to a specific marginalised or disadvantaged cohort [and] designed to meet their particular needs”,

- YEI interventions “encapsulate all employability supports”, including education and training programmes, community based schemes, internships and employer incentivised job programmes, and
- YEI “contributed to improving the quality and focus of existing provision”.

Overall, the report concludes that the “YEI implementation strategy had clarity in terms of its socio-economic context, targeted the relevant groups effectively, made provisions for the support needs of these groups and manifested a partnership approach at both national and local level.

With regard to *effectiveness*, the report notes that –

- the YEI activities contain “the requisite mix of....supports to sustain young people in the labour market”,
- while it was “too early to measure the contribution of the particular YEI intervention to actual sustainable integration”, it was worth pointing out the “quality and rigour” of, for example, Momentum and JobsPlus employment supports, and
- a significant challenge within the programme is the divergence between a focus on accessing employment and the “softer aspects” of labour market activation programmes.

With regard to *efficiency*, the report notes that –

- the absence of unit costs per operation required a focus on, for example, improving the quality of and levels of innovation within existing provision, and
- there is good evidence of collaboration and partnerships between agencies and other bodies involved in the delivery of YEI activities.

With regard to *impact*, the report notes that, in the absence of data on YEI employment outcomes (because of the early stage of YEI implementation), a wider range of impacts were considered and –

- improvements to “confidence and self-esteem, attitude to work and social interaction” were among the softer “perceived impacts” of YEI activities,
- there is no evidence of displacement of employment solutions for over 25s, and
- while wider structural changes have impacted positively on YEI activities, “the increased focus on activation measures for the under 25’s can be attributed to an extent to the YEI.

Overall, the report finds that, while it was too early to reach any robust conclusions, the correlation between the timing of YEI implementation and the overall fall in youth unemployment is “noteworthy” and “the strategic and operational approach adopted were important factors in a generally positive implementation for the YEI”.

Recommendations

The report makes six main recommendations, summarised below –

1. Training on programme monitoring should be provided by “ESF Compliance Unit” [DSP] to relevant DSP staff, delivery organisations and stakeholders.
2. ESF Compliance Unit should bring greater clarity to YEI delivery and associated targets, particularly as YEI funding was front-loaded to 2014/2015, yet many of the activities did not commence until 2015.
3. The review of JobBridge “First Steps” should consider a community-based approach to delivery.
4. Consideration should be given to commissioning a research programme on NEETs.
5. Consideration should be given to reducing the eligibility criteria for Momentum, Tús and SICAP from 12 months to 4 months in the event of their cadre of long-term unemployed reducing significantly.
6. Monitoring should be more cognisant of “softer outcomes”, which should also be addressed by the final YEI scheduled for 2018.

Observations

Written observations on the report were provided by the Department of Social Protection (DSP) and the Department of Housing, Planning, Community and Local Government (DHPCLG). The main findings and recommendations of the report have also been discussed with SOLAS and the relevant section within the Department of Education and Skills.

Follow-Up Actions

Regarding **Recommendation 1**, on programme monitoring, DSP has noted that delivery organisations and related stakeholders have no direct role in monitoring the schemes concerned as monitoring is undertaken by DSP staff. DSP noted that those staff would receive training from the scheme policy owners with assistance from DSP EU Funding Compliance Unit.

For **Recommendation 2**, on targets post-2015, DSP noted that a review of 2015 scheme expenditure was in progress and a report on compliance levels for 2015 would be

produced on completion. The findings of this report would be circulated to relevant staff to provide direction on how improvements can be made for 2016 and beyond.

In relation to **Recommendation 3**, relating to JobBridge First Steps, the Minister announced his plan to replace JobBridge with a more targeted scheme in May 2016. He asked the Labour Market Council to assist his Department in designing the new scheme. The Labour Market Council includes representatives from the INOU, ICTU, and IBEC.

The Indecon Report, which was completed in September 2016, indicated that JobBridge has been very effective in increasing the employment outcomes of the jobseekers. 79% of participants - about 38,000 people - have had some employment spell in since completing the internship, over 64% are still in employment and a further 10% are now involved in further education. Compared to a matched group of non-participants, jobseekers who participated in JobBridge improved their employment outcomes by 12 percentage points – or 32%. The Labour Market Council also presented their proposals and recommendations for a new scheme to the Minister.

In October 2016, the Minister officially launched the Indecon Report along with the Labour Market Council proposals, while he also announced the closure of the JobBridge Scheme with effect from 21st October. It will be replaced with a new Work Experience Programme which will be launched in Q2 2017. This will allow the Department to wind down the existing scheme in an orderly manner and allow people currently participating on a JobBridge internship to complete their placement. It will also provide the Department with an opportunity to consult with key stakeholders on the design principles for a new work experience programme.

On **Recommendation 4**, which proposes the commissioning of a research programme on NEETs, including “hidden” NEETs, there were diverging views. While DSP held that analyses of NEETs in Ireland show that the “vast majority” of NEETs are either engaged with Employment Services or in education and training, DHPCLG stated that the reference to hidden NEETs was “well made”.

The ESF MA is of the view that the issue of engagement with NEETs in Ireland is worthy of further examination and would welcome proposals from intermediate bodies for specific research in this area. In that regard, the ESF MA has agreed to co-finance, with DHPCLG, a “qualitative analysis of engagement strategies, interventions and outcomes delivered” for NEETs under SICAP. This research is expected to commence in January and be completed by mid-2017.

With regard to **Recommendation 5**, which noted that the reduction in eligibility criteria from 12 months to 4 months for JobsPlus could potentially be extended to

other programmes, each of the Departments/IBs concerned has been made aware of this recommendation. DPHCLG noted that this suggestion was “well made”, while DSP noted that, while it had no plans to reduce Tús’ eligibility period in that manner, the “underlying rationale and resources commitments” for such scheme are kept under review.

Finally, regarding **Recommendation 6** on the monitoring of “softer outcomes”, the Committee agrees that such outcomes are important and valuable and notes that the same issue was touched upon in the ESRI’s (October 2016) report examining training provision delivered in 2014 under the Social Inclusion and Community Activation Programme (previously known as the Local and Community Development Programme). This report noted that while it is important that interventions in the community development space are subject to scrutiny in order to ensure value for money, there are a number of considerations involved in any decision to evaluate actions in the particular programmes in this space.

As noted in the Report, “it may be the case that individuals accessing programmes through community development programmes rather than mainstream services are significantly more disadvantaged relative to mainstream clients. If this is so, then purely quantitative assessments are likely to downwardly bias the estimated impact of SICAP programmes if they are not able to account for more substantial levels of disadvantage among the treatment group. Given the concentration of SICAP activities in areas with high level of social disadvantage, quantitative methods may potentially underestimate the full impact of many of the programmes operated under SICAP. This would be the case particularly if any control group population was to be drawn from the general population on the Live Register.”

The report suggests that the nature of the work carried out under SICAP, and the particular barriers faced by their target groups, creates a need for both qualitative and quantitative analysis. While this would be a costly process, investing in improved data infrastructure could lead to more effective monitoring of outcomes

While the Committee notes that the relevant Regulations require the monitoring of more absolute outcomes relating to education, employment etc., the MA –

- will discuss with IBs how the monitoring of such softer outcomes might be progressed within the context of the overall monitoring of the OP,
- will explore how an analysis of such outcomes might be incorporated into the Mid-Term Evaluation of the OP to be completed by end-2017 and the final evaluation of YEI to be completed by end-2018 and,
- as is noted above, would welcome proposals from IBs for relevant research activities which could encompass an analysis of softer outcomes.