



# Work Package 3 Evaluation

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# Overview

- The Evaluation Team and Contribution
- Evaluation Approaches and Process
- Evaluation Tools, Process, Outputs and Outcomes
- Main findings
- Conclusions and Lessons learned

# Evaluation Team

## Team Members

**Dr Marjukka Vallimies-Patomäki**, WP leader  
Ministry of Social Affairs and Health, Finland

**Mr Andrew Xuereb**, WP Co-leader  
Ministry for Energy & Health, Malta

**Prof. Johanna Lammintakanen**, Management Scientist  
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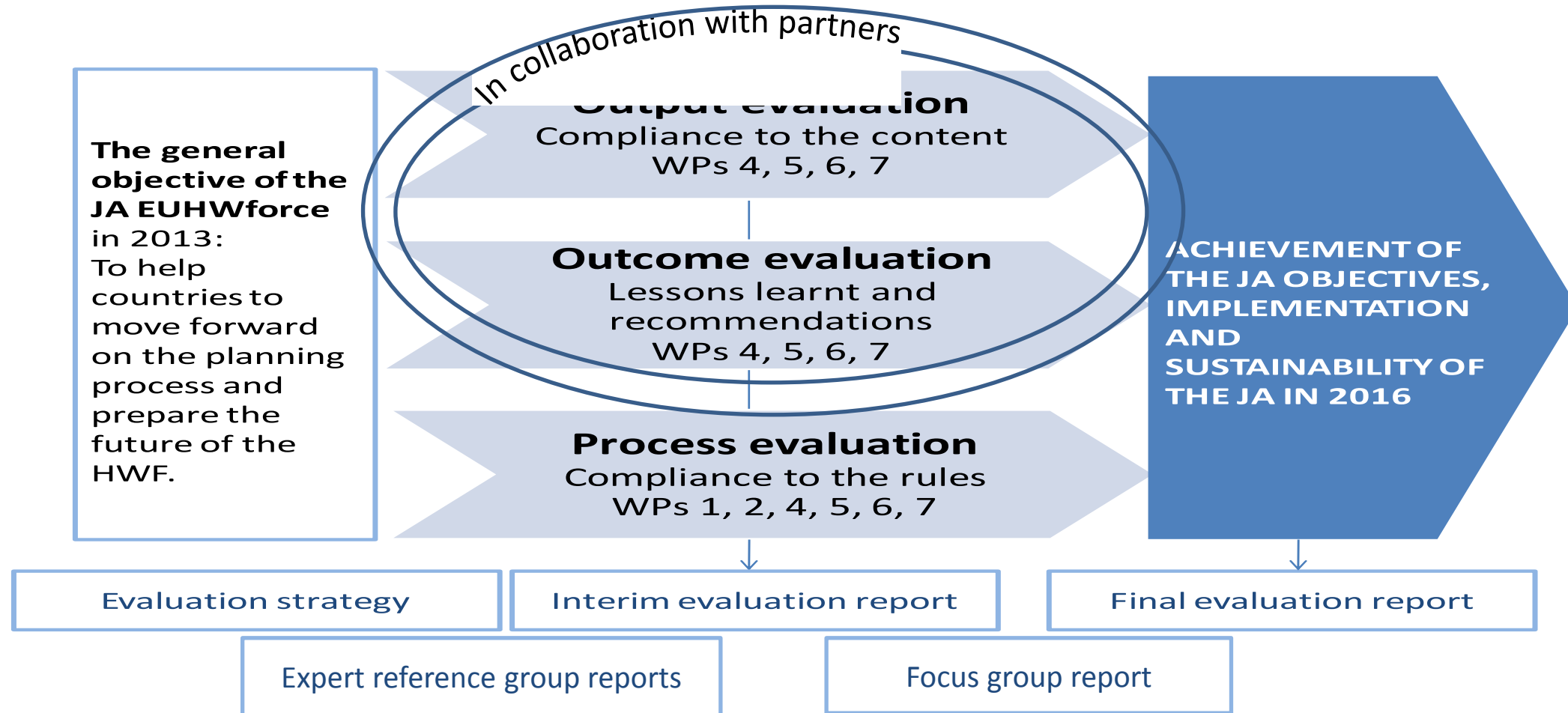
**Ms Alisa Puustinen**, Junior Management Scientist,  
University of Eastern Finland, Finland

**Ms Minna Joensuu**, Researcher  
University of Eastern Finland, Finland

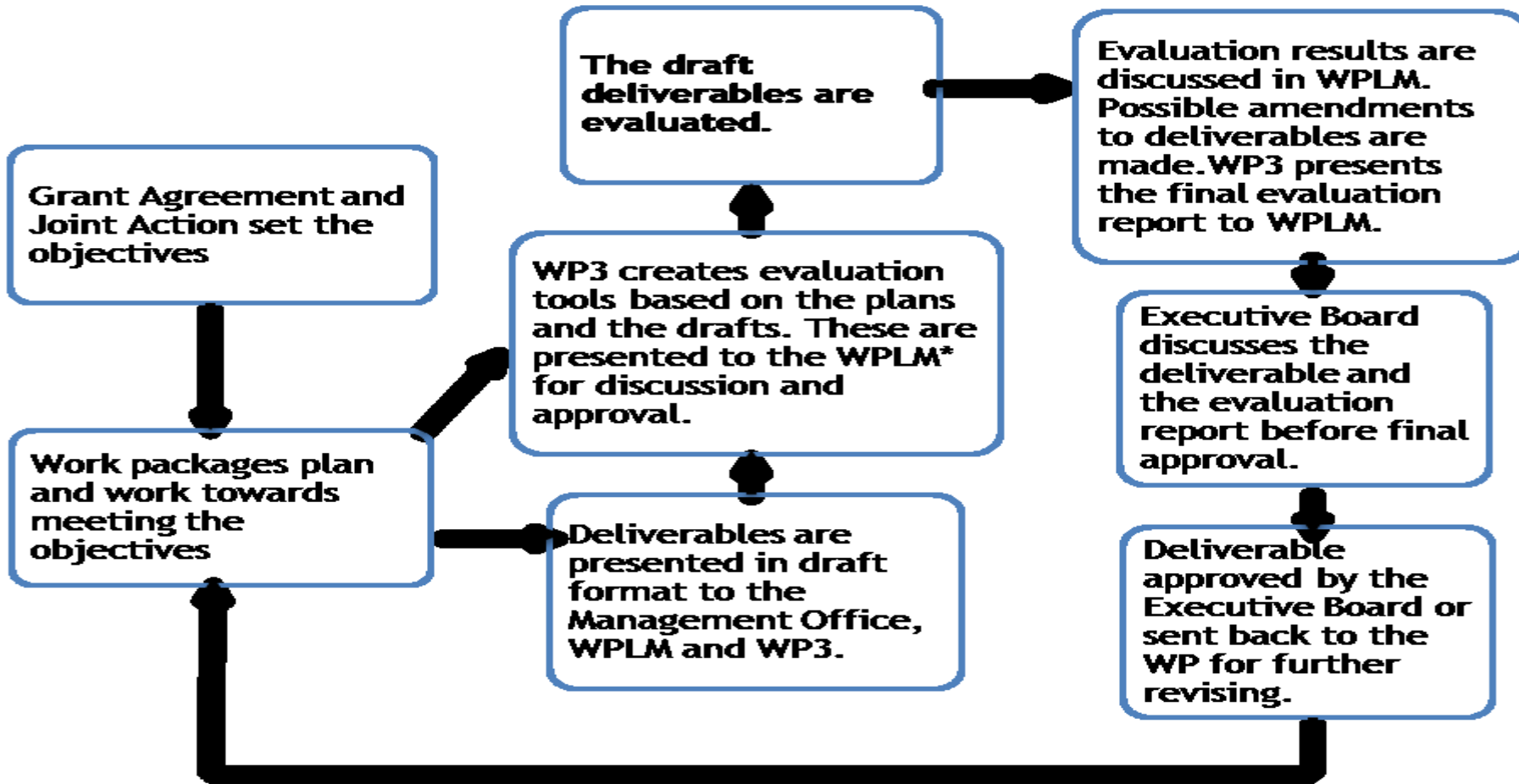
## Contribution

- *Formulation of Evaluation Strategy (D031)*
- *Formulation of Evaluation Check Lists*
- *Deliverables' Evaluation & Reports*
- *Management of Expert Reference Groups & Report (D032)*
- *Management of Focus Groups & Report*
- *Interim & Final Evaluation Report (D033 & D034)*
- *Participation in:*
  - *Executive Committee Meetings*
  - *Work Package Leader Meetings (Physical & Electronic)*
  - *JA Plenary Assemblies & Conferences*
  - *Work Packages Workshops*

# Overview of the Evaluation Process



# Deliverable Evaluation Process



# Process Evaluation – WP3 Checklists

Materials	Evaluation method	Evaluation tool
<ul style="list-style-type: none"><li><i>Stage plans, progress reports, minutes of the meetings and risk and issue templates by the WPs 1, 2, 4, 5, 6 and 7 and Management Office</i></li></ul>	<ul style="list-style-type: none"><li><i>Review process of the formal reports</i></li></ul>	<ul style="list-style-type: none"><li><i>Check lists based on Structured criteria agreed with the WP leaders and Management Office</i></li></ul>

# Output evaluation (1) – WP3 Checklists

Materials	Evaluation method	Evaluation tool
<ul style="list-style-type: none"><li>• <i>The deliverables at different stages</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Review process of Deliverables</i></li><li>• <i>Scores ‘Yes’ or ‘No’ or ‘Incomplete’ and comments</i></li></ul>	<ul style="list-style-type: none"><li>• <i>WP3 designed Check lists based on Grant Agreement approved evaluation indicators</i></li><li>• <i>Compiled in Report to respective Work Package Leader and Executive Board</i></li></ul>



# Output evaluation (2) – Expert Reference Groups

Materials	Evaluation method	Evaluation tool
<ul style="list-style-type: none"><li>• <i>The deliverables at Final stages</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Assessment of Deliverables by Experts including researchers, policy makers, decision makers and practitioners, balanced by gender, geographically</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Semi-structured electronic questionnaires designed by WP3</i></li><li>• <i>Responses put together in an ERG report</i></li></ul>



# Outcome evaluation – Focus Groups

Materials	Evaluation method	Evaluation tool
<ul style="list-style-type: none"><li>• <i>Certain deliverables at the Final stages,</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Focus Group interviews with 4-5 thematic experts NOT directly involved in the deliverable being evaluated</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Questions prepared by WP3 for the Meeting focusing on the Sustainable future of the JA</i></li><li>• <i>WP3 formulates Focus Group Report (analysis in progress)</i></li></ul>

# Mix of Evaluation Tools for Deliverables

Deliverable	OUTPUT EVALUATION		OUTCOME EVALUATION
	WP3 EVALUATION	EXPERT REFERENCE GROUP	FOCUS GROUP
Terminology gap analysis (D041)	✓		
Report on mobility data (D042)	✓	✓	✓
Report on HWF Planning Data (D043)	✓		
Minimum Planning Data (D051)	✓		
Handbook on Planning Methodologies (D052)	✓	✓	✓
Web Portal on Planning Methodologies (D053)		✓	
Report on Pilot Studies Experiences (D054)	✓		
User's Guidelines on Qualitative Methods (D061)	✓		
Report on Future Skills and Competencies (D062)	✓	✓	✓
Web Content on Horizon Scanning (D063)		✓	
Sustainability Strategy (D071)	✓		
Network of experts (D072)	✓		✓
Technical Recommendations (D073)	✓		✓
Recommendations towards Policy Making (D074)	✓		✓

# Main Findings – Expert Reference Group (1)

## Report on mobility data (D042)

- D042 can be assessed to meet the goals and aims set to it both in the Grant Agreement and in the report itself.
- D042 is useful in terms of improving the national level data collection and also EU-level policy dialogue. It brings added value to the present discussion on mobility data collection and processes.
- The recommended Individual Mobility Data Set (IMDS) was seen as being relevant in terms of tracking HWF mobility and indicators relating the IMDS were assessed as being inclusive enough. However, in the future a more detailed insight in the diversity of the HWF professionals with e.g. Data Category variables would be useful.
- Individual Mobility Data Set (IMDS) was suggested to be developed jointly with Joint Questionnaire

# Main Findings – Expert Reference Group (2)

## Handbook on Planning Methodologies (D052)

- D052 can be assessed to meet the goals and aims set to it both in the Grant Agreement and in the report itself.
- The five key elements of the HWF planning systems as presented in the deliverable are valid and cover the essential aspects of HWF planning system.
- The informational value of the selected good practices is in general good and also the description of the selected HWF planning systems is reliable.
- The experts had critical comments on the authority of the deliverable and it seems that there is a need to sharpen the aim and scope of the deliverable as well as the evidence base of some of the findings.
- Experts expected the results of the pilot studies to influence the content of the deliverable and to still strengthen the argumentation behind the key elements. Based on the Joint Action objectives, the role of the pilot studies is to test the usability of both the minimum data set for HWF planning (as defined in D051) and the good practices identified in the D052.

# Main Findings – Expert Reference Group (3)

- **Report on Future Skills and Competencies (D062)**
- D062 meets the aims set for it in the report itself, but some dispersion of opinion remained whether it reaches all the goals of the Grant Agreement.
- D062 is regarded as being informative, but staying on a rather general level of discussion on skills and competences.
- The systems approach was assessed to be relevant in terms of detecting drivers for the future, but weak signals and potential drivers that are not addressed in the report still remain.
- There is also a need to sharpen the use of the concepts of skill and competence as well as to address in more detail the changing roles of both health workers, care workers and customers/patients as a part of whole system of health and social services.
- The policy briefs were informative and relevant.

# First impressions - Focus Groups (1)

- **Report on Mobility Data (D042)**
  - Joint action has been valuable in inducing discussion on HWF mobility
  - Still a lot of work to be done on terminology and measurement of mobility -> huge differences between countries -> very difficult in terms of comparability
  - Maintaining national interest in dealing with mobility is a big issue
  - Continuing international dialogue is vital
  - The broader working conditions and patient safety are important in the future of HWF mobility
- **Handbook on Health Workforce Planning Methodologies Across EU-countries (D052)**
  - Provides a full range of planning methodologies to be used, but needs more refined “user’s guidelines” to be put into practice
  - Most important to concentrate on the dissemination, getting the Handbook to the end user
  - Focus on how the policymakers will commit to the issue of HWF planning

# First impressions - Focus Groups (2)

- **Report on Future Skills and Competencies (D062):**
  - Recommendations may be more specific and evidence based
  - Workshops between clusters of countries with similar context may be more effective
  - Very valid document, important to market effectively
- **Network of experts (D072), Technical Recommendations (D073) & Recommendations towards Policy Making (D074)**
  - Building political support for HWF very important
  - Need to convince countries that there is a need for HWF in the first place
  - HWF planning needs to be supported by relevant education
  - Needs to be done at the country level at first
  - Clustering “similar” countries for further future discussion and collaborative learning
  - Network of experts needs to be incorporated on existing structures



# Conclusions

- The evaluated deliverables were generally of good quality and produced in accordance to the grant agreement and there is a lot of potential to contribute in policy dialogue
- Evaluation is an integral part of the Joint Action *process*, not merely objective monitoring of the goal attainment.
- Should contain elements of *developmental evaluation*.
  - Role shifted towards participatory developmental evaluation
  - Benefit from more timely feedback during the process
- Developmental evaluation can contain all the elements of process, output and outcome evaluation.

# Lessons learned for future J.A. evaluations (1)

- Evaluation takes time and must be incorporated into the project planning from the beginning to enable the evaluators' work and feasible feedback to core work packages
- Ample time for evaluation should be included in the planning and timing of the whole project and particularly in the delivery of the outputs.
- Diversity of evaluation methods and tools is encouraged.
- Methods and tools are to be based on the theory of evaluation, and adjusted to meet the needs of development oriented program evaluation.

## Lessons learned for future J.A. evaluations (2)

- A mixture of expertise both in the evaluation methodology and in the substance of the Joint Action in question is crucial.
- Use of external experts both in output evaluation (quality control) and outcome evaluation is encouraged.
- External experts must be foreseen in the resources and budget of the evaluation team.
- There is definitely a need to evaluate outcomes after J.A. closure.
- This requires for example resources (time, money, personnel), a clear mandate and a responsible organization.



Joint Action Health Workforce  
Planning and Forecasting

Thank you for your attention!



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