



## Poland

*Monika Bartosiewicz-Niziołek, Beata Ciężka, Weronika Felcis,  
Katarzyna Hermann-Pawłowska, Seweryn Krupnik,  
Piotr Strzęboszewski and Agnieszka Szczurek*

### 1 GENERAL COUNTRY OVERVIEW

To understand the development of evaluation and its institutionalisation in Poland, one must consider two crucial events for its current political system.

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M. Bartosiewicz-Niziołek (✉) · B. Ciężka · W. Felcis · A. Szczurek  
Polish Evaluation Society, Warsaw, Poland  
e-mail: [monika.bartosiewicz-niziolek@pte.org.pl](mailto:monika.bartosiewicz-niziolek@pte.org.pl)

B. Ciężka  
e-mail: [beata.ciezka@pte.org.pl](mailto:beata.ciezka@pte.org.pl)

W. Felcis  
e-mail: [weronika.felcis@ioce.net](mailto:weronika.felcis@ioce.net)

The first is the collapse of communism and the re-establishment of a democratic republic in 1989. Although the current political system has been lasting for almost thirty years, its short history has exhibited a relatively low level of stability. In some public policy areas (for example education), reforms are implemented very often. While such dynamics should increase demand for evaluation of national policies, it rarely does. The lack of stability of the political system in interacting with the factors described below hinders the institutional learning of public administration (Ferry and Olejniczak 2008).

The second circumstance is Poland's accession to the European Union (EU) on 1 May 2004. The comparatively high popularity of evaluation of the UE initiatives in Poland stems mostly from the external requirements imposed by the European Commission (Bienias et al. 2012; Januszkiewicz 2016). Although the widespread use of evaluation of UE funded programmes seems to be a positive effect, these practices are quite often perceived by some stakeholders as a form of control rather than an opportunity to learn more about institutional actions and as a possibility to improve them (Ferry and Olejniczak 2008; Bartosiewicz-Niziołek et al. 2018). Thus, evaluation is sometimes treated as an artificial cost of co-financing rather than an immanent value of a learning process. Moreover, even if evaluation is institutionalised, it is not integrated enough with the planning and implementation of public policies (Kot 2014).

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W. Felcis · S. Krupnik  
Centre for Evaluation and Analysis of Public Policies,  
Jagiellonian University, Cracow, Poland  
e-mail: [seweryn.krupnik@uj.edu.pl](mailto:seweryn.krupnik@uj.edu.pl)

K. Hermann-Pawłowska  
IDEA of Development Foundation, Wierzbica, Poland  
e-mail: [katarzynahermann@ideaorg.eu](mailto:katarzynahermann@ideaorg.eu)

P. Strzęboszewski  
National Evaluation Unit, Ministry of Investment and Development,  
Warsaw, Poland  
e-mail: [piotr.strzeboszewski@miir.gov.pl](mailto:piotr.strzeboszewski@miir.gov.pl)

A. Szczurek  
Ośrodek Ewaluacji Sp. z o.o., Warsaw, Poland  
e-mail: [a.szczurek@ewaluacja.eu](mailto:a.szczurek@ewaluacja.eu)

Another important factor influencing the institutionalisation of evaluation in Poland is the moderate level of the development of civil society (EU-Russia Civil Society Forum 2017; USAID 2017; Adamiak et al. 2016). This is true especially in relation to the formal dimensions of social activities, such as membership in non-governmental organisations (NGOs) and contribution to community activities. Poles prefer more individualised and informal forms of social activity (Wenzel and Kubik 2009). As a result, the preference for institutionalised measurement or research along with reflection about the effects of implemented initiatives are relatively poor. Moreover, Polish NGOs are highly dependent on public grants, that is national, regional and local funds (Przewłocka et al. 2013). That is why the decision about the conduct and scope of evaluation depends mostly on the funders' preferences.

It is worth underlying that the state of civil society in Poland is related to the comparatively low level of social trust (ESS 2016, 2019). This is also true in case of trust in public institutions and the state in general (Marková 2004). Only 23% of Poles report to have confidence in the national government, which is one of the lowest results for Organisation for Economic Cooperation and Development (OECD) countries, where an average confidence level is 42% (OECD 2016). The low level of social trust handicaps the perception of evaluation as a learning and improvement tool, within which all stakeholders openly articulate their opinions. Some entities that commission of evaluation research (regardless of the public or NGO sector) identify it with monitoring, audit, assessment or accreditation (Korporowicz 2013), thus tend to expect mainly positive results and prefer not to mention weaker sides of conducted activities. Such an approach may reduce evaluation practices to formal and bureaucratic aspects—a kind of ritual, ostensible activities (Podkońska 2016; Jaskuła 2018)—as well as result in a negative attitude towards evaluation (Bartosiewicz-Niziołek 2019).

Another set of factors influencing the process of institutionalisation relates to the Polish academic system. As far as universities are concerned, it is a common view that they have three missions: teaching, research, and supporting regional development by working together with public, private and non-governmental organisations (Brundenius and Göransson 2011). To understand the situation in Poland one should keep in mind that while teaching and research are acknowledged and institutionally rewarded, this is not necessarily the case with its third mission. Thus, universities generally cooperate with other organisations to a relatively limited scope and intensity

(Górniak 2015a). Moreover, research units exist, which focus on developing and transferring knowledge about evaluation methodology and praxis. However, their focus stems from strategic decision of its leaders rather than from national or organisational policies. As a result, the number of evaluations conducted by university research institutes is quite limited (Kot 2014).

Beyond EU funds, the school education system is an important area where evaluation is present (Mizerek 2017; Jaskuła 2018). The Minister of National Education's directive of 7 October 2009 legally sanctioned school system evaluation. Over the past two decades, evaluation tools and methods have been included in a number of activities aiming to improve the quality of school education system in Poland (Mazurkiewicz 2012). Various stakeholders contributed to this process, such as governmental bodies, school supervising institutions and education departments at the central and municipal levels. It is also worth emphasising that a key role in ensuring the quality of Poland's education system has also been played by academic centres and non-governmental institutions where the first evaluations were conducted in the mid-1990s (Mizerek 2006). The latter often provided financial support under various grant programmes for schools and other education institution.

In conclusion, while evaluation is strongly present in Poland, its institutionalisation faces challenges that are typical for the beginning of this process, especially in a country with a young democracy. The most important supporting factors involve external pressure and the growing awareness of its utility among national stakeholders. Above all, to fully develop national evaluation capabilities in Poland, elements of political, social and academic dimensions in the system must be appropriately ready. Among these factors, the most essential include: the stability of public policy strategic planning at the country and regional levels, the stronger integration of evaluation with other elements of public policy cycle management leading to a higher awareness of its benefits among all stakeholders; further development of organised forms of civil society and an increased level of social trust; policy support for the fulfilment of universities' third mission; continued development of evaluation competencies along with positive attitudes towards evaluation.

## 2 INSTITUTIONAL STRUCTURE AND PROCESSES (POLITICAL SYSTEM)

### 2.1 *Evaluation Regulations in Different Fields*

The issue of evaluation in the context of mandatory or desirable research or other related activity is currently raised in over 1000 legal acts of various rank in Poland.<sup>1</sup>

Unfortunately, there is very little information about the use of evaluation in the work of the parliament. This does not mean, of course, that they do not use research and analysis. In the structures of the Polish parliament (both in the Sejm and the Senate), there are research and analytical offices. Their tasks include, among others, supporting the legislative process with scientific data and advice; providing expert assistance in the performance of the parliamentary mandate; conducting research (in the areas of law, economy, society) relating to the legislative process. In their activities, however, they do not refer directly and intentionally to the theory and practice of evaluation. Therefore, in the following chapter, we concentrate on horizontal solutions and selected areas with the relatively strongest legal bases of the evaluation process.

The practice of policy evaluation is anchored in a national law regulating the modes for conducting policies in Poland. The law from 2006<sup>2</sup> sets specific requirements concerning the process of evaluating national and regional strategies and programmes. According to this act, each strategy (including the country's development strategy and main strategies determining the regulations for activities in particular public sectors) is subject to a mandatory ex ante evaluation. In addition, any public programme of over 300 million PLN (approx. 70 million EURO) must also be evaluated.

<sup>1</sup> I.e. 1098 legal acts as of 25 January 2018 according to a query based on keywords using the *legalis* database, <https://legalis.pl/produkt/baza/>.

<sup>2</sup> Act of 6 December (2006) on the principles of conducting the development policy (No. 227). The planned amendments would limit the obligation to conduct an ex-ante evaluation for the strategic documents, whereas the programmes would be required to be subject to ex-post evaluations. The introduced change is supposed to be a response to the lack of financial resources required to perform the ex-ante evaluation. In addition to the introduced ex-post evaluation, there are plans to introduce the mandatory provision of adequate funds for the evaluation process within a given program.

The next horizontal document creating the legal framework for developing an evaluation culture in Poland is the ‘Strategy for Responsible Development’ from 2017. It is the government’s main strategic document until (including the perspective up to 2030). The Strategy assumes, among others, strengthening the analytical capacities of the state, including development of evaluation. One of the tasks provided in the strategy is creation of the system to evaluate public policies based on the experiences stemming from the Cohesion Policy evaluation system that has been being developed in Poland since 2004. For this purpose, an analytical–prognostic network is to be set up within government’s administrative structures to feed policy-making processes with evidence–based information (SRD 2017).

The Cohesion Policy is one of the areas with the strongest and the most detailed legal framework for evaluation in Poland. In this field, irrespective of directly binding EU regulations, national law and guidelines on evaluation were introduced for the 2014–2020 period. Those documents together with additional instructive documents prepared by the National Evaluation Unit,<sup>3</sup> regulate, among others, the thematic scope, timing, organisation and rules for evaluation of Cohesion Policy programmes financed by EU funds.<sup>4</sup>

Over the past two decades, evaluation has also been strongly institutionalised in the Polish education policy due to the introduction of legal changes in the way the pedagogical supervision is conducted. The 2009 directive issued by the Minister of National Education introduced a new strategy of pedagogic supervision, which includes evaluation of the educational activities of schools and educational institutions (Sobieraj 2014). Another impetus promoting evaluation culture in the education sector is the requirement to evaluate projects (implemented by schools) that are financed from various international and national grant programmes.

The next example of a policy field where evaluation has been anchored in a sector-specific law concerns development assistance that is provided through the Ministry of Foreign Affairs. The Development Cooperation

<sup>3</sup>The coordination unit of the evaluation process in Poland. Established pursuant to the Act of 6 December 2006 on the principles of conducting the development policy. Currently under the Ministry of Investment and Economic Development.

<sup>4</sup>One of the most significant changes compared to the 2007–2013 programming period was a very significant limitation of a scale of evaluation conducted on projects’ level (details were described in a reference no. 7), as well as the introduction of counterfactual approach along with the theory-based evaluation (TBE).

Act of 2011 requires the evaluation of the multiannual development cooperation programme (known as Polish Aid). Whereas the effort made by Poland to introduce evaluation in this field is recognised by OECD, further efforts guaranteeing the overall independence of the evaluation function as well as widening its scope to all aid channels are recommended and supported by the OECD Development Assistance Committee (OECD 2016).

Following the inspirational developments in the EU and OECD on better regulations, government rules have been gradually introduced since 2001 on the implementation of regulatory impact analysis (RIA) in Poland. The ministerial guidelines from 2015 on RIA encourage drawing on the experiences of the evaluation of Cohesion Policy programmes in Poland, particularly relating to methods for ex post impact assessment of regulations (Górniak 2015b).

Legal requirements also apply to some programmes that are financed by national funds and implemented by NGOs—not only the largest one, Civil Initiatives Fund, but also minor funds administered by municipal authorities.

## 2.2 *Evaluation Practice*

The first evaluation practices were introduced in Poland in the mid-1990s, as a result of foreign funds (such as PHARE and USAID) that were aimed at emerging NGO sector as well as the reform of the education system. The latter one was supported by two programmes, that is TERM (Training for Educational Reform Management, implemented in 1994–1997) and its continuation SMART (Strategic Measures for Achieving Reform Target, carried out in 1997–2000). The initial studies were conducted by the international team managed by Professor Helen Simons (the former President of the United Kingdom Evaluation Society), who was a promoter of evaluation of the fourth generation (Mizerek 2006, 2017). This approach was reflected in the following mottos that accompanied the birth of the evaluation practices in Poland: “There is no evaluation without democracy” and “There is no democracy without evaluation” (Jaskuła 2018, p. 63). Then, the process of development of evaluation research expanded thanks to EU pre-accession funding (2004–2006). Between 2002–2017, 1279 evaluations were carried out in Poland within Cohesion Policy (CP). In the development cooperation policy (a much less experienced but growing evaluation field) 11 thematic evaluations have been conducted since 2012 (OECD 2017). In the education sector, the number of completed external

evaluations is much higher—31.010,<sup>5</sup> but their scope is limited to assessing the activities of schools. As regards NGO community, there is no available data that enable to assess the number of evaluation research conducted, so far.

Cohesion Policy in Poland has been implemented in the following, so-called financial perspectives—2004–2006, 2007–2013, 2014–2020. Thus, three stages of the development of the CP evaluation system in Poland can be distinguished.<sup>6</sup> The first one—‘beginnings’—covers pre-accession period and the first, short financial perspective to 2007. During this time, a framework of the evaluation system and its capacity was established. The second developmental stage started in 2007. Regional evaluation units were established and a dynamic increase in the number of implemented evaluations began (125% increase in the number of completed studies between 2007 and 2008). The last change in the trend in the number of evaluations relates to modifications in the dominant research approaches. At the end of the 2007–2013 financial perspective, the use of counterfactual methods was introduced and promoted across the EU Cohesion Policy evaluation system. It was also linked to focusing on results (relating to results-oriented policies) and impact evaluations. This type of research, more demanding, expensive and time-consuming, reduced the number of CP evaluations being conducted (Fig. 1).<sup>7</sup> The number of implemented evaluations is also influenced by the public intervention cycle. In the years coinciding with the *ex ante* and *ex post* evaluation, lower dynamics of the process is observed than in the period dominated by on-going evaluations (Fig. 2).

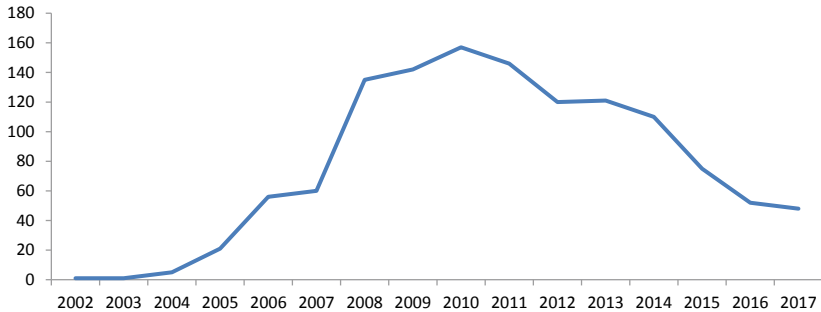
The evaluation system of the Cohesion Policy in Poland is characterised by a balance between the regional and central levels (altogether 33 evaluation units existed in these both types of administration in 2016). In the entire analysed period (2002–2017), 52% of evaluations were carried out by units located in central public administration. With the establishment of

<sup>5</sup> Data from the web evaluation platform: <http://www.seo2.npseo.pl> (Accessed on 30 January 2018).

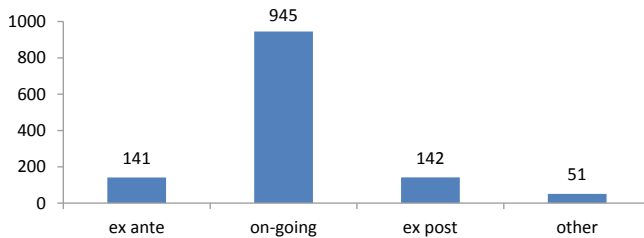
<sup>6</sup> The development stages of the two evaluation systems (concerning the CP and education policy) are described differently by various authors (cf. Żuber and Bienias 2008; Korporowicz 2011; Bienias et al. 2012; Mizerek 2017).

<sup>7</sup> In 2015 the Ministry of Development decided that evaluations at the project level would be ineligible for financing (unless approved by the managing authority). This resulted in the almost total elimination of projects evaluations, causing a reconstruction of the evaluation market in Poland.





**Fig. 1** Number of completed evaluation studies of Cohesion Policy in years (Own study based on the Evaluation Database of the National Evaluation Unit [Accessed on 8 February 2018])



**Fig. 2** Number of evaluations as due of the moment of their implementation (Own study based on the Evaluation Database of the National Evaluation Unit [Accessed on 8 February 2018])

a larger number of regional evaluation units in 2007, a small change in the above-mentioned proportions is noticeable. In 2007–2017, units located in the central administration conducted 49% of all studies.<sup>8</sup>

The predominant type of evaluations commissioned within the Cohesion Policy was on-going one, which is a natural consequence of the seven-year programme cycle and day-to-day information needs of evaluation's users. The most often examined thematic areas within the Cohesion Policy in

<sup>8</sup>There is also an analogous unit in the Polish Agency for Enterprise Development – in relation to EU funds, and evaluation units in educational institutions (universities, Central Examination Board) in case of national funds.

Poland were: the CP delivery system (286 evaluations, which accounts for 22% of all research carried out), regional and local development (263 evaluations, i.e. 20%), labour market (156 evaluations, i.e. 12%).<sup>9</sup> A prevailing number of evaluations commissioned by the public administration is carried out externally. The employees of evaluation units are also engaged in other than evaluation tasks, which makes it almost impossible to conduct evaluations internally. The position of the European Commission also had an impact on the adoption of such solutions. It is considered a best practice to assign the evaluation to external experts or to a different organisation than the one accountable for implementing the programme (European Commission 2014). The same is true for development cooperation policy, where one dedicated member of the staff in the Ministry of Foreign Affairs is responsible for planning and commissioning external evaluators as well as for disseminating evaluation findings. As a result, the independence of the process is ensured by having public administration evaluation studies commissioned through tenders.

As regards external evaluation studies in Poland, they are conducted mainly by domestic companies. In the last two years, there were about 40 entities in the Polish research market capable to evaluate the Cohesion Policy. First of all, these were consulting and research companies, while rarely NGOs or representatives of the academic community.

A different practice has been adopted in the education policy sector. Here the evaluation is conducted both externally—by properly prepared inspectors, and internally by the employees of a given school/educational institution, in accordance with the school's/institution's needs and for its own use (Mazurkiewicz and Berdzik 2010). The external evaluation is determined by local education offices in the annual evaluation plan, indicating the schools that will be evaluated in a year. It is worth mentioning that the internal evaluation is initiated and carried out by schools themselves to assess and assure the quality of education they provide. According to the Polish legislation, the school principal is obliged to carry out this process with other teachers. Involvement of the whole school community (i.e. students and their parents) is also widely promoted (OECD 2017). In respect to school evaluations, external evaluation is carried out at the

<sup>9</sup>Own study based on the *Evaluation Database* of the National Evaluation Unit. See <http://www.ewaluacja.gov.pl/strony/badania-i-analizy/wyniki-badan-ewaluacyjnych/baza-badan-w-arkuszu-kalkulacyjnych/>. Accessed on 8 February 2018.

level of programme management in grant-giving institutions and in case of internal evaluation beneficiaries are responsible themselves.

As regards the scope of applied methods and research techniques, it is quite varied. In most studies concerning EU funded projects triangulation is used as both qualitative and quantitative methods are implemented (Chojacki et al. 2016). Thanks to good cooperation with the National Statistical Office, which provides data, counterfactual methods are also used. In the last three years, the use of theory-based evaluation has been also evolving. On the contrary, in the education policy sector, within the context of schools' simple quantitative methods and group techniques are most often utilised.

### 2.3 *Use of Evaluation*

Evaluation in Poland serves various functions and supports learning, decision-making, and improvement (formative role), but it is also used—presumably even more frequently—for the sake of accountability (summative role), legitimacy and formal requirements (procedural role). In turn, the promotional function of the Polish evaluation (i.e. increasing the credibility and gaining public support) seems to be the rarest one. The available data on the use of evaluation in Poland concerns exclusively the Cohesion Policy, which is justified by the number of evaluation studies that were conducted and their potential impact on national policies. One of the recent study identified several good practices concerning the dissemination of evaluation findings in Poland in comparison to other V4+4 countries<sup>10</sup> (Olejniczak et al. 2018). This research indicates practices such as: creating an online searchable database including evaluation reports as well as sending short briefs to politicians, members of the government, think tanks,

<sup>10</sup>V4+4—a cultural and political alliance of eight central European states: Poland, Slovakia, Hungary, Czech Republic, Slovenia, Bulgaria, Romania, and Croatia. It was created as an extension of the activities of the so-called Visegrad Group (V4)—the alliance of four Central European states—the Czech Republic, Hungary, Poland and Slovakia, that are members of the EU and NATO—for the purpose of advancing military, cultural, economic and energy cooperation with one another along with furthering their integration in the EU. The Group traces its origins to the summit meetings of leaders from Czechoslovakia, Hungary, and Poland held in the Hungarian castle-town of Visegrád on 15 February 1991. Visegrád was chosen as the location for the 1991 meeting as an intentional reference to the medieval Congress of Visegrád in 1335 between John I of Bohemia, Charles I of Hungary and Casimir III of Poland.

opinion leading media, et cetera. Although these solutions facilitate access to evaluation results for a wide range of potential evaluation users, the study shows that the main users of evaluation findings continue to be employees of the institution that commissions the evaluation—programme managers and department directors.

Moreover, cooperation between knowledge users, its producers and brokers need to be improved. The dissonance between what evaluation units claim they provide and what users think they receive is still significant. According to the evaluators themselves, they mainly provide knowledge about mechanisms, while users indicate that they usually receive information concerning effects and processes (Olejniczak et al. 2018).

Thus, the knowledge regarding mechanisms of implementation is a crucial unmet commissioners' need for information. The other limitation of using evaluation results different sources of information, such as those 'stemming from experience on the ground' that are more frequently used. This phenomenon can indicate that evaluation takes too long to provide findings when they are needed (Kupiec 2015).

The example of use of using evaluation regarding the Cohesion Policy reveals universal challenges that are characteristic for Poland, for example, matching the scope of evaluation with the needs of its users, the right timing of conducting research, and the participatory character of evaluation<sup>11</sup> as well as the quality of the whole process (NEU 2014).

The use of EU programme evaluations in Poland is facilitated by the National Evaluation Unit (NEU), which coordinates the provision of standards and guidelines for all EU funds-related evaluation units (e.g. based in the central institutions or the regional ones). In order to improve the process of evaluation use, an innovative system for monitoring of the process of implementation of recommendations has been created. This system enables the ongoing monitoring of the extent to which the recommendations resulting from the evaluation process are used by public administration.

The use of evaluation results is conditioned to a great extent by its value. In Poland, the quality assurance of evaluation is supported by the 'Evaluation Standards' that were elaborated and disseminated by the Polish Evaluation Society, as well as by the more practical solution that has been

<sup>11</sup> Participatory character of developmental evaluation in Poland encourages discussion of the evaluation findings with a wide range of potential users.

developed in Poland within the CP implementation system. The Evaluation Guidelines<sup>12</sup> require evaluation units to assess the quality of the whole evaluation process along with its findings after completion of the evaluation service. An assessment card of evaluation containing eight specific categories and basic information concerning each study is prepared. The steering groups on evaluation may also play an important role in ensuring the quality of the evaluation by discussing its findings. Another tool for improving the quality of the conducted research is the meta-evaluation that concerns the Cohesion Policy.

Many difficulties with the quality assurance of evaluations that are carried out in Poland (not only concerning EU funds) are primarily related to the abovementioned lack of trust, especially between the commissioning agencies and their contractors (external evaluators), as well as to the form of this relationship that is mostly very formalised and based on legal, usually short-term (several month long) contracts. Secondly, not insufficient quality of evaluation may be caused, among others, by the lack of a certification system (in Poland there is no legitimate way for proving evaluation competencies), domination of the price criterion in public procurement (particularly in the past years), and also low competences of some commissioners who are not able to demand the right quality from contractors' side.

### 3 SOCIETAL DISSEMINATION/ACCEPTANCE (SOCIAL SYSTEM)

#### 3.1 *Institutionalised Use of Evaluation in Civil Society*

Non-governmental organisations are a crucial embodiment of civil society and there are about 70.000 NGOs in Poland. Most of them are small organisations with a limited budget. In 2014 the average annual budget of a Polish NGO was PLN 27.000—approx. 6460€ (Adamiak et al. 2016). Key funding sources were public (i.e. EU funds, local and central government financing), however, evaluation of NGO activities—at the projects' level—is rarely a requirement connected to accessing these funds.

The role of evaluation was accentuated in the NGO Practice Charter in 2010. Non-governmental organisations and other representatives of civil

<sup>12</sup> Guidelines of the Minister of Investment and Development on the evaluation of Cohesion Policy for 2014–2020, 28 September 2015 together with later amendments.

society are involved in the evaluation process of some public interventions in Poland, however, (1) mostly at the programme level (not a single project they run, but a given programme within which this project is implemented); (2) as the participants of steering groups or monitoring committees that support the process of evaluation of a certain programme. Once again, Cohesion Policy is an example of a good practice in this area. NGO representatives participate in the groups established for supporting the evaluation of every operational programmes. As members of a given Programme Monitoring Committees or Steering Groups, they are informed of evaluation results and the state of implementation of recommendations, as well as discuss these issues. Participants of these groups may also propose themes and consult the concepts of the evaluations which are conducted by public administration. The scope of powers and responsibilities of social partners is described, among others, in the national guidelines for the evaluation of the Cohesion Policy for 2014–2020.

Nevertheless, as an everyday practice evaluation is not very common among the Polish NGOs. A 2008 report on non-governmental organisations stated:

“Many non-governmental organizations cannot even state the number of beneficiaries of its actions, which points to a lack of evaluation and monitoring culture in the third sector” (Stowarzyszenie Klon/Jawor 2008, p. 34). Only 22% of examined NGOs declared conducting evaluation of their projects and actions. The increased interest in evaluation was linked to the EU-financed programme requirements. In the 2007–2013 financial perspective the most popular portal for the third sector provided a series of articles promoting evaluation. There were also organised various evaluation trainings, workshops and seminars for the NGOs in that period. In 2012, the share of organisations that rely on evaluation increased by 15% points, but still, 63% of examined NGOs reported that they had not carried out a systematic evaluation of their own activities or their effects (Stowarzyszenie Klon/Jawor 2012; unfortunately, there is no more follow-up data after 2012). One of the exceptions to this rule is the Polish-American Freedom Foundation (PAFF) that provides a good example of the evaluation use. PAFF along with partner organisations created a coherent evaluation system, which include funding of research, standards & guidelines, support and training for the partners. PAFF runs a dedicated MEVA programme (Monitoring, Evaluation and Analysis), which finances evaluation of implemented projects that is conducted with partner organisations. It

promotes dissemination of know-how and building of evaluation culture among PAFF partners.

Although the NGO environment was one of the first areas where evaluation practices developed in Poland, the institutionalised use of evaluation by civil society it is still underdeveloped. Even though there are national resources designed for NGO activities, (i.e. the Fund of Civic Initiatives), that are externally evaluated, evaluation research conducted by its beneficiaries (on the projects level) is not required, contrary to a monitoring that is mandatory.<sup>13</sup>

Grass-root calls for evaluation mainstreaming in civil society usually come from the local level, especially if citizens are directly involved in policy or budgetary decisions. Such direct decisions rarely concern more than 3–5% of the total municipal budget. Evaluation is also used to assess the impact and usefulness of local community centres. This allows them to better adjust their profiles to meet citizens' needs. Thus, using evaluation may be the result of expectations and pressure from the general public after it gains direct decision-making influence or it can be treated by local governments as a useful tool for engaging the voters.

The use of evaluation by civil society is described in publications relating to best practices in participatory budget implementation and local public consultations (Fundacja Pracownia Badań i Innowacji Społecznych „Stocznia” 2015; Ośrodek Ewaluacji 2016). Both documents themselves were elaborated as a result of civil society initiatives and participation.

Social programmes, such as participatory budgeting, prevention or revitalisation programmes as well as public consultations are usually evaluated externally in large Polish cities (e.g. Warsaw, Cracow, Gdynia, Poznan, Lublin), while in smaller towns, such studies are much rarer, reduced to monitoring reports or limited to internally conducted surveys (Ośrodek Ewaluacji 2017).<sup>14</sup>

In case of large cities evaluation reports are published on the internet and the results are used to communicate with citizens. In Warsaw (the capital of Poland), a unit of the mayor's office i.e. Public Communications Centre conducts evaluations of many of its programmes. Its evaluation

<sup>13</sup> Civic Initiative Fund Program for 2014–2020. Annex to Resolution No. 209/2013 of the Council of Ministers of 27 November 2013.

<sup>14</sup> <http://wolomin.org/wp-content/uploads/2018/02/Raport-z-ewaluacji-WBO-2018.pdf>; <https://twojbudzet.um.warszawa.pl/aktualnosci/wydarzenia/zako-czy-o-si-badanie-ewaluacyjne-iii-edycji>.

activities provide a demonstration effect for other institutions in Warsaw. Each year, the number of evaluations conducted by the city and its districts is increasing. The Office of the Capital City of Warsaw requires evaluation of cultural projects funded by public funds and also projects in the field of social assistance coordinated and outsourced by the city to various NGOs (known as ‘public tasks’). In case of evaluation of the latter one the crucial problem is the lack of awareness and competence of the local authority and contracting NGOs (that are required to carry out evaluation) as well as unrealistic assumptions regarding the schedules and budgets of these evaluations.

As regards evaluation practices much depends on the experience and determination of civil servants. Unfortunately, the process of building this institutional maturity, that underpins organisational learning as well as the evaluation culture, is rather slow and based on single persons who are enthusiasts of evaluation. This process should be also supported by systematic training of the civil servants along with as well as additional efforts aimed at popularisation of evaluation in local governments, especially in smaller towns.

Concluding, institutionalised use of evaluation in civil society in Poland is in the initial phase. Polish NGOs evaluate their projects more often, if they are large organisations with stable budgets as well as are financed by foreign funds that require evaluation research. Smaller NGOs approach evaluation in a less systematic manner, often using their own resources as well as less advanced, cheaper and single methods of collecting data that do not meet the triangulation standard (f.i. team discussions or surveys of beneficiaries).

### ***3.2 Public Perception and Discussion of Evaluation and Evaluation Findings***

Despite the large number of evaluation reports elaborated in the area of the Cohesion Policy as well as education, public perception and debate on evaluation results almost do not exist besides the internal and limited to abovementioned monitoring committees and steering groups. Moreover, “production” of evaluation reports (especially in 2007–2013) seems to exceed their “consumption”, that is the use of evaluation findings what caused specific inflation of evaluation (Olejniczak 2013). Most of the evaluation reports concerning education policy and the Cohesion Policy Operational Programmes are disseminated via websites (and as regards the latter



relatively rarely as paper publications). Since 2006 all reports concerning the CP are collected and shared in the Evaluation Database published on the website maintained by the National Evaluation Unit.<sup>15</sup> Typically, evaluation contracts include (along with a report) a presentation of the results to the key decision-makers. Sometimes brochures popularising the main results are also produced. Such practices help to disseminate evaluation results, but they rarely reach a wide audience. Public awareness of what evaluation is and what benefits it can bring, is still unsatisfactory. This leads to limited public interest and debate on evaluation results. The same applies to the school system evaluation, that is obligatory since 2009. Report are widely discussed in schools, followed by teachers, but much less frequently or not at all by parents or local communities. Thus, public debate on evaluation results is significantly limited. It is not led with the broad participation of society (e.g. in the media), but at best during conferences intended for experts, mainly representatives of commissioners and contractors. This situation stems from the above-described context in which evaluation appeared in Poland. Evaluation practices had not developed as a result of a natural evolutionary process, but they were rather introduced as a formal requirement connected to EU funds implementation (Kot 2014). In a country where an undemocratic regime was maintained for over than 40 years, the process of introducing evaluation conceived as ‘a tool of institutional learning’ or ‘a quality management tool’ encountered numerous obstacles. Instead of popularisation of the fourth generation of evaluation, it is often reduced in practice to the simple assessment, control and accountability of achieved results (Korporowicz 2008, 2011; Bartosiewicz-Niziołek 2019). There is still too little reflection on the effects of implemented programmes undertaken by their stakeholders, as well as too much focus and pressure on analysing planned vs achieved indicators. Despite the number of evaluations conducted, there are no regular mechanisms engaging various stakeholders in all stages of the evaluation processes, so far. Strengthening public ownership of evaluation and better dissemination of results may be a way to enhance the usefulness of evaluation (Mackiewicz 2014). The real participation, engagement and collectivisation of the evaluation process seems to be a rational direction of the Polish road to evaluation (Korporowicz 2012).

<sup>15</sup>For more info, see: <http://www.ewaluacja.gov.pl/strony/badania-i-analizy/wyniki-badan-ewaluacyjnych/baza-badan-w-arkuszu-kalkulacyjnym/>.

## 4 PROFESSIONALISATION (ACADEMIC SYSTEM)

Although hundreds of people have been involved in evaluation over the last 10 years, the profession of ‘evaluator’ does not formally exist in Poland,<sup>16</sup> nor is one able to obtain a university degree in this field in the country. Current regulations provide the opportunity to initiate new academic disciplines, so it may be that evaluation will be introduced as a field of university education, but such degree programmes have not been developed in Poland yet.

### 4.1 *Academic Study Courses, Further Training, and Other Learning Opportunities*

With the introduction of education standards in 2011, university study programmes in Poland must be in line with the requirements of a National Qualifications Framework (i.e. a detailed description of qualifications attained in the higher education system). In accordance with these standards, a master’s programme in sociology includes the subject ‘Procedures of Evaluation Research’ that ensures the acquisition of the following skills and competencies: understanding the issues of evaluation, its social functions and the role of an evaluator, as well as applying basic analytical procedures and empirical sociology tools in evaluation research. Several universities offer courses in evaluation, but only as a part of their two-year master’s degree programmes, mostly in sociology but also in social policy, political science, pedagogics and management. Most of these classes are conducted at two of the largest and oldest Polish universities—the University of Warsaw (eight courses)<sup>17</sup> and at the Jagiellonian University in Cracow (five

<sup>16</sup> Even though the Polish Classification of Occupations and Specialties includes ‘the evaluator of education programmes’, this refers exclusively to education and is assigned to the group of ‘teaching inspectors and specialists’.

<sup>17</sup> Smaller universities may be afraid of such ‘a niche discipline’ strongly associated with EU funds, so having an uncertain future or they may perceive it as a threat to the student recruitment process. Instead of increasing the number of new students, it could ‘disperse’ potential candidates of current disciplines, intensifying recruitment problems for other faculties. Thus, most probably only the largest universities would be able to afford the introduction of a specialisation in evaluation.

courses).<sup>18</sup> Also, at smaller universities, evaluation is usually taught within sociology or pedagogics specialties.<sup>19</sup>

Beside Master's programmes yearlong post-graduate studies in evaluation are also available. At first (beginning in 2004), such studies mainly focused on EU funds. Most of them were offered in Poland's capital, such as at the University of Warsaw, in the institutes of sociology, social policy, management, as well as at some smaller universities (i.e. Warsaw School of Economics, Cardinal Wyszyński University and the private one Kozminski University). Moreover, post-diploma studies for teachers are offered for example by the Jagiellonian University, but also by minor universities or educational institutions throughout the country and even by non-academic entities (i.e. Widespread Knowledge Society). Smaller cities offer such studies in higher schools of economics, management or entrepreneurship and at universities of technology, both public and private ones.

Since 2008, the Centre for European Regional and Local Studies in cooperation with the Ministry of Investment and Economic Development has been operating (at the University of Warsaw) the 'Academy of Evaluation', the only free of charge post-graduate study programme for civil servants. One of its main aims is to convince the civil servants to use the

<sup>18</sup> For example, at the Institute of Sociology—'Evaluation Research' (30 hours), the Institute of Applied Social Sciences—'Procedures for Evaluation Research' (30 hours), the Institute of Political Science—'Analysis and Evaluation of Specific Policies' (30 hours), the Faculty of Education—'Evaluation of Educational Institutions' (60 hours), the Institute of Social Policy—'Evaluation in Social Policy' (60 hours) and 'Evaluation of Labour Market Projects' (30 hours), the Institute of Social Prevention and Resocialisation—'Evaluation Methodology' (45 hours); these last two classes are exceptional, as they are taught at the undergraduate level (licentiate degree). The Centre for European Regional and Local Studies offers the course 'Evaluation Theory and Practice' (60 hours) within a Master's seminar in the field of spatial management.

<sup>19</sup> Two evaluation classes are offered in the Institute of Sociology, also as parts of the Master's programme in Data Analysis and Social Studies—'Evaluation and Analysis of Public Policies' (60 hours) and 'Evaluation in Practice: an Assessment of a Selected Social Intervention' (60 hours). Evaluation is also taught in the Institute of Public Affairs—'Evaluation in Social Policy' (30 hours), the Institute of Intercultural Studies—'Evaluation of Cultural Projects' (30 hours) and the Institute of European Studies—'Evaluation and Audit of EU projects' (5 hours). However, initial analysis of the syllabuses from the university's internet databases revealed dozens of specialty subjects contained the term 'evaluation', but the status of many of them was defined as inactive (Maciejewska 2014).

knowledge brought by evaluation to effectively operate their institutions' development policies.<sup>20</sup>

As regards non-formal education, the Polish Evaluation Society (PES) has the longest tradition in Poland in conducting training in evaluation. Since 2000, it has trained over 500 representatives of public administration, NGOs, consultancy and research companies, mainly through a 60-hours course 'The Evaluation Forge' that has been offering since 2010.<sup>21</sup> Its curriculum includes: evaluation design, qualitative and quantitative research methods along with tools, data analysis, evaluation report and using evaluation results. The training is practically oriented and is carried out by experts who have extensive experience in commissioning and conducting of evaluation. In 2016, PES implemented a project based on blended learning that included distant training 'Take a course on evaluation' along with some workshops, webinars and tutoring. The course was addressed to those who wish to gain basic and intermediate information about evaluation, systematise or deepen information in this area or merely confirm their knowledge by passing the examination and obtaining the certificate. The structure of the distant course is similar to 'The evaluation forge' and takes about 30 hours of learning, which includes texts, examples, exercises, quizzes, problem solving, tasks and knowledge tests.<sup>22</sup> Since 2009, PES has also supported another Polish NGOs by implementing three projects providing competence through tutoring (training, workshops and consultancies regarding evaluations of projects implemented by participants of the courses).

More advanced course concerning counterfactual methods in evaluation is offered by the Centre for Evaluation and Analysis of Public Policies of the Jagiellonian University, in cooperation with IDEA of Development Foundation, the Polish Evaluation Society and Timberlake Consultants Ltd. This 50-hour summer school 'Evidenced-based public policies' is addressed mainly to representatives of public administration and firms conducting

<sup>20</sup> The course is financed from EU funds (Technical Assistance) and aims at supporting the Polish evaluation system by training representatives of public administration in commissioning evaluation and using its results. <http://www.euroreg.uw.edu.pl/pl/akademia-ewaluacji1>.

<sup>21</sup> This course is organised once or twice a year in two different formulas—a closed one for a respective institution, or in an open form for any interested applicant.

<sup>22</sup> At present, together with a few Voluntary Organisations for Professional Evaluation, PES is seeking a grant to translate the course into English and several other languages.

evaluation research.<sup>23</sup> The Polish training market also offers several, usually one-day training in monitoring and evaluation provided mainly by consultancy firms and NGOs. Longer course targeting specific vocational groups were also available, for example in 2011, the Office for the Movement of Social Initiatives offered 72-hour evaluation training within an EU project entitled ‘Evaluation as the key to success’, to support the development of professional qualifications and consulting for Polish enterprises. Since 2012, according to the Regulation of the Minister of Family, Labour and Social Policy, the training programme for the specialisation of organising social assistance includes 20 hours of classes on evaluation.

#### 4.2 *Profession/Discipline*

The largest and most influential VOPE in Poland is the Polish Evaluation Society (PES) established in 2000. In 2007 the pool of PES members began to grow rapidly, reaching more than 150 persons. PES associates representatives of public administration, NGOs, consulting and research firms, academics and independent evaluators. Its main aims are to build an evaluation culture in Poland, propagate evaluation as a democratic and social process, integrate people interested and involved in evaluation, enrich knowledge about evaluation and support its quality.

In 2008, PES implemented a yearlong project aimed at developing evaluation standards. This initiative was financed by the EU and implemented as a part of the Transition’s Facility programme ‘Strengthening Evaluation Capacity in the Public Sector’. This project involved over 60 persons, both commissioners and evaluators, representatives of public administration, NGOs, consulting firms, scientific and academic institutions, as well as independent evaluators (free-lancers) in the process of developing evaluation standards for Poland’s evaluation community.

However, this project has not been accompanied so far by further initiatives aimed at the professionalisation of evaluation, such as the establishment of an arbitration board and an ombudsman for evaluation or a journal devoted solely to evaluation issues.<sup>24</sup>

<sup>23</sup> It is intended for those who commission or conduct research using counterfactual analyses and the theory-based approach (TBE), which are recommended in 2014–2020 perspective by the European Commission in relation to impact evaluations.

<sup>24</sup> Though PES has been striving for this for some years.

Articles on evaluation are occasionally published in journals regarded public management, social policy or regional studies. The largest series of several books on evaluation has been published since 2007 by the Polish Agency for Enterprise Development. Although the series focuses mainly on evaluation in public administration (particularly with references to entrepreneurship), it raises a wide range of topics. Some books were also published by units of Polish evaluation system, for example, a guide for public administration staff released by the National Evaluation Unit (Bienias et. al 2012), or post-conference publications prepared by the evaluation units of regional authorities (Marshal Offices, e.g. in Toruń, Opole). The Regional Centre for Social Policy in Cracow issued a number of publications on the evaluation of social policies, including an online evaluation guide as a part of the EU project ‘Małopolska Observatory of Social Policy’ implemented in 2008–2015. In 2010–2015, a series entitled ‘Evaluation in Pedagogical Supervision’ was also published by the Jagiellonian University as a part of an EU project<sup>25</sup> addressed to the education community (e.g. teachers, advisors, inspectors). Moreover, several publications were also issued by Polish NGOs. For instance one of the PAFF’s partners, The Unit for Social Innovation and Research ‘Shipyard’ published two manuals: ‘Evaluation—how is it done’, and ‘Mini Guide for Evaluation of Cultural Education Project Implementers’, as well as elaborated tips for evaluation of the participatory budget and released a film promoting evaluation (Fundacja Stocznia; Ostrowski and Wiśnicka 2013; Durlik and Dziarmakowska 2017).

Presently, the evaluation market is dominated by groups of specialised contractors, mainly consulting and research firms conducting evaluations for the public sector. The pool of contractors,<sup>26</sup> both domestic and foreign companies, has developed rapidly since 2007 for over a dozen years as a response to the dynamically increasing demand driven by the evaluation requirements relating to EU funds. The Evaluation Research Database operated by the NEU includes over 230 entities that conducted evaluation of Cohesion Policy initiatives implemented in 2002–2017. The group of contractors is strongly differentiated—beside consulting and research firms,

<sup>25</sup> This project aimed at strengthening the effectiveness of the pedagogical supervision system and assessing the quality of school work.

<sup>26</sup> This may be related to the need to use innovative methodological approaches and expert knowledge.

it includes universities, research institutes, NGOs and independent evaluators, though their share in the evaluation market is relatively small compared to the major players—consulting companies (Bienias et al. 2015). Nevertheless, in recent years, significant changes have occurred in the Polish evaluation market. Several international consulting companies have withdrawn, a number of evaluators have shifted from the private to the public sector, and there has been some reduction in the share of freelancers. This may be due to a transition in financial perspectives,<sup>27</sup> accompanied by a change of the political authorities in Poland, resulting in a several-month gap in tendering for evaluation contracts. Another reason may be the strong price competition that is contributing to a reduction of evaluation budgets. Small firms and independent evaluators were also affected by the decision of the Ministry of Investment and Economic Development making the evaluation of EU projects a conditionally eligible cost as of 2016,<sup>28</sup> resulting in the cessation of evaluation at this (i.e. single project) level.

## 5 CONCLUSION

As explained throughout this chapter, evaluation research in Poland started to develop rapidly under the EU paradigm of monitoring and evaluation systems dominating other approaches. This has overwhelming consequences for Polish evaluation culture. On one hand, it has been swiftly introduced in public administration at central and local levels with large amount of funds devoted to creating the system in the beginning of 2000s, as well as new workplaces, a variety of publications, conferences, training (mainly, but not only for civil servants) and many other evaluation-related activities. On the other hand, at the beginning of this process, evaluation was a hermetic tool of managing EU funds with limited spill-over effect into other sectors, constricting the independent development of approaches and methodologies or limiting evolution of evaluation as an academic discipline. In addition, the operational programmes cycles affect the size of the demand and in consequence the stability of the profession to a great

<sup>27</sup> Between 2007–2013 and 2014–2020.

<sup>28</sup> This concerns projects financed by the European Regional Development Fund, the European Social Fund and the Cohesion Fund. An institution managing a given operational programme has to approve a project level evaluation.

extent. Nevertheless, some positive trends can be observed since the evaluation was introduced to Polish administrative practice after the EU accession. Evaluation has been anchored in national law as a mandatory tool for the ex-ante assessment of public horizontal and sectoral strategies and programmes. Evaluation is also a required procedure in the education system (since 2009), Polish development cooperation (known as ‘Polish Aid’) that supports less developed countries, and also NGOs’ projects funded by national and some local and municipal resources.

Unless the non-governmental environment was one of the first areas where evaluation developed in Poland, institutionalised use of evaluation research by civil societies is mainly affected by a low level of social trust. Nevertheless, there are admittedly also successes in the third sector evaluation—its role was accentuated in the NGO Practice Charter in 2010.

Over the past two decades, also evaluation in the education sector has also been strongly institutionalised in Poland due to the introduction of legal changes in the way pedagogical supervision is exercised. However, the overall reforms of educational system are frequent and not always evidence-based, which destabilise the context of schools’ operations.

Although hundreds of people have been involved in evaluation processes over the last 10 years, the profession of evaluator does not formally exist in Poland, nor is it possible to obtain a university degree in this field. Evaluation is instructed as a scientific discipline mainly as part of two-year Master’s degree studies—mostly in sociology but also in social policy, political science, pedagogics and management. Diverse post-graduate, yearlong studies in evaluation are also available, focused especially on UE funds and the education system. Publications on evaluation have also been issued primarily as a part of EU projects, usually implemented by non-academic entities working on public administration, education or social policy issues.

The Polish Evaluation Society has the longest tradition in Poland of conducting training in evaluation. Since 2000, PES has trained over 500 representatives of public administration, NGOs, consultancy and research companies, mainly through its 60-hour course ‘The Evaluation Forge’ that has been organising since 2010. Evaluation standards developed by PES in 2008 to support the evaluation process and ensure its quality, but the use of this document, both by commissioners and evaluators, is voluntary.

As described above, the advancement of the institutionalisation of evaluation in Poland varies among sectors. Indeed, some national policies and third sector programmes are permanently evaluated. There are also evaluation studies based on rigorous methods that has been widely promoted in



the region as good examples. Cohesion Policy evaluation tries to reverse the focus from the quantity of studies towards their quality and rooting it in legislative structures. In turn, the third sector produced its own materials on evaluating social projects, while evaluation in education has experimented in the development of different evaluation systems and is still open to changes. Last but not least, the Polish Evaluation Society as the oldest in Central and Eastern Europe is a strong actor in professionalising the field with its courses, seminars, conferences and congresses, as well as with standards and guidelines on conducting evaluation ethically and rigorously. Concluding, the last 20 years of developing the evaluation culture in Poland is comprised of extensive efforts to root ‘improving by learning’ and evidence-based policymaking in all the discussed fields. Although this process has been meeting some failures or weaknesses, it has also resulted in many advantages that can be considered exemplary for this European region.

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