



# EVALUATION OF THE OPERATIONAL PROGRAMME SOCIAL INCLUSION AND EMPLOYMENT'S COMMUNICATION STRATEGY

*PROCEDURE FOR TENDER No. 53/SGMTSSS/PO ISE/2021*

**EXECUTIVE SUMMARY**  
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## **SCOPE**

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1. This document presents the Executive Summary of the Evaluation Study of the Communication Strategy (CS) of the Operational Programme Social Inclusion and Employment (PO ISE), reported to 31.12.2021 and covering the answer to four evaluation questions (EQ), corresponding to the analysis of relevance/pertinence, effectiveness, efficiency and impacts.

## **ABOUT THE STRATEGY UNDER EVALUATION**

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2. The PO ISE's CS is programmed with an allocation of around € 1.4 million (equivalent to €175,000 per year over an 8-year period), suggesting a high ambition to produce results. At 31.12.2021 the implementation rate of that allocation was equivalent to 53% of this amount. The CS aims both to disseminate and communicate the instruments supported by PO ISE, enhancing its demand, as well as results of improving public perception about the use of the European Social Fund (ESF) in promoting the social inclusion and employment of the Portuguese and the greater adjustment of public policies to the country's development needs.

3. The PO ISE's CS is organized in three implementation phases: launch and notoriety, implemented in a short time, Operational Program (OP)'s consolidation, relaunch and dissemination of results and monitoring. This ambition corresponds to a diverse range of communication materials and instruments, from participation in events, digital communication (written press and social networks) to the production of promotional materials, among others.

## **EVALUATION METHODOLOGY**

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4. The PO ISE's CS evaluation tested the application of a theory-based evaluation (ABT) methodology, combining the elaboration of a Theory of Change (ToC), that has been discussed and validated in a meeting with the PO ISE's Management Authority, with principles of realistic and evidence-based evaluation. This methodology is the formalized result of Quaternaire Portugal's experience developed along different evaluation exercises, where the central idea of Pawson and Tilley has been present, according to which "the realistic evaluation does not ask 'what works' or if 'this program works', but asks instead 'what works for whom, under what circumstances and in what dimensions and how'.

5. The evaluation encompassed a sequence of three reports, including an Initial Report dedicated to methodological questions, an Interim Report conceived by the evaluation team as an anticipation of the Final Report and a Final Report, culminating all the evaluation work, after having incorporated in all three phases the commentaries elaborated by the Managing Authority.

6. All evaluation work was based on a multimethod analysis, framed by the ToC that supported the process, highlighting the following processes of information gathering and treatment (i) the desk-research analysis of documentation provided by the Management Authority on the communication materials mobilized and literature on the communication processes's evolution; (ii) an inquiry process involving a population survey, a survey to final recipients and a survey to beneficiaries; (iii) semi-directive interviews with institutional personalities involved in the implementation; (iv) three discussion panels with communication specialists, with intermediary bodies and beneficiaries and with some members of the PO ISE's technical team.

## THE EVALUATION NARRATIVE

7. Considering that the CS's implementation phases targeted different internal and external publics and the ambitious goals established strictly in line with the ToC supporting the evaluation, mainly of the CS's impacts, the evaluation narrative is built from the robust results achieved by the survey addressed to the Portuguese population and confronting them with the results from the electronic surveys addressed to final recipients and beneficiaries. This approach is important since it works first with the notoriety results revealed by publics which are more distant from the PO ISE's action and of European Structural and Investment Funds (ESIF) in general, evolving progressively towards a higher proximity to the PO ISE, first final recipients, and beneficiaries afterwards.

8. It should be noted that, given its relevance to the entire evaluation narrative, the surveying process is robust concerning to its statistical significance:

	Number of valid questionnaires
<b>Population in general</b>	<b>505 valid answers</b> The maximum error margin associated with a random sample of 505 respondents is 4.36% for a 95% confidence interval. 52.5% of respondents were female, 33% from the North, 21% from the Centre, 28% from the Lisbon Metropolitan Area, 7.5% from Alentejo, 5% from the Algarve, 3% from the Autonomous Region of Madeira and 3% from the Autonomous Region of The Azores.
<b>Final recipients</b>	<b>1,350 valid answers</b> For a universe of 1.171.054 participants supported by the PO ISE, until 31.12.2021, were obtained 1.350 valid responses, corresponding to an error margin of 2.67% for a 95% confidence interval. The representativeness of the Priority Axis was guaranteed with the following error margins: 4.79% for Axis 1, 4.45% for Axis 2 and 4.63% for Axis 3 for a 95% confidence interval
<b>Beneficiary Entities</b>	<b>336 valid answers</b> For a universe of 958 beneficiary entities, were obtained 336 valid answers corresponding to an error margin of 4.31% for a 95% confidence interval. The segmentation by Priority Axis and NUTS II Region was respected, however the sample obtained did not allow an axis segmentation identical to the Universe, observing a slight overvaluation of the responses of the beneficiary entities with operations approved in Axis 1.

9. Despite the central role of the survey representativeness in the methodology and in the results, it should be noted that it is inseparable from the combination achieved with the diverse set of information sources mentioned above. Thus, it should be noted that the contributions of individual interviews, particularly those concerning to subjects for which the availability of information was more limited. It is the case of the interviews with Intermediate Bodies (IB), Beneficiaries Responsible for Public Policy Implementation (BREPP) and Single Beneficiaries (SB), which were crucial to understand the existing relationship with the PO ISE's Managing Authority and how the role of these entities may be relevant in terms of OP's notoriety. But the value of triangulation is also visible in the three discussion panels held, which brought to the evaluation qualitative elements related to internal communication (especially in the discussion panel held with PO ISE's technical team elements), to PO ISE's notoriety and to understand potential increase aspects in OP communication and visibility, contributions from both communication specialists and IB, BREPP and SB. Finally, the desk-research allowed the evaluation team to increase the knowledge of the communication actions/initiatives developed under the CS, through the analysis of the achievements and their associated financial amounts.

## **MAIN CONCLUSIONS AND RECOMMENDATIONS**

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10. This evaluation elaborated two types of conclusions: specific conclusions supported by the answers to the evaluation questions and more general conclusions in line with the global evaluation narrative. The general conclusions have been elaborated as instruments for support decision-making process (recommendations), specially covering the next programming period.

### **Conclusions arising from the approach to evaluation questions**

#### **Concerning to Relevance**

11. The relevance analysis of the actions defined and implemented by the PO ISE's CS, in relation to the strategic objectives pursued, allows to conclude that these actions have been adequate and that they were implemented in line with the strategic objectives closer to the scope of the OP's intervention. That is, the notoriety and communication impact of actions is higher when it involves target audiences more directly involved in the PO ISE's implementation. Although, even at this level, it is possible to increase notoriety and communication impact, namely through a higher segmentation of communication in the universe of the most involved target audiences in the OP and the more structured combination of communication channels.

12. From the point of view of the more general objectives, which intersect with the PT2020's scope, the PO ISE communication faces some difficulties that are not directly attributed to the communication channels and actions. There is a large atomization of OP with distinct logos and brands that impairs a coherent and integrated communication.

13. The set of communication actions/initiatives mobilized by the PO ISE's CS presents, overall, a satisfactory level of relevance, especially in relation to its diversity and relevance to impact the audiences more directly involved in the PO ISE implementation. According to the evidence gathered, and with the experts' testimonies, among the communication materials universe, there are typologies that no longer generate great receptiveness, particularly among younger audiences (e.g. merchandising materials).

14. The social networks mobilization has, concerning to relevance, a high interest, especially among younger audiences. CS has shown a growing effectiveness in generating followers of PO ISE social networks, although it still presents a significant growth potential. If these OP social networks had a more proactive management, especially mobilizing complementary elements oriented towards a higher density of followers, such as the creation of specific campaigns or the association with "ambassadors" or "influencers", they could achieve greater relevance and would be a powerful element to accelerate the PO ISE's notoriety.

#### **In terms of effectiveness**

15. The effectiveness analysis is hampered by the lack of metrics of results to be achieved with the various communication actions planned and implemented. Despite this limitation, the evidence points to a growing intensification of the actions implementation, contributing to a high degree of these actions.

16. Concerning to the achieving objectives, through the CS's phases, stands out the 1st phase - "Launch and Notoriety" - which was mainly important for the brand promotion to the beneficiary entities and the general public and for the demand access to needs satisfaction. The high number of participations

in events and public sessions, at this stage, indicates the concern of generating notoriety for a more institutional audience and, thus, attracting potential beneficiaries and partners. Some notoriety was achieved with IB, SB, BREPP and other beneficiaries and, in addition, the OP's logo was able to transmit inclusion and diversity values both to beneficiaries and final recipients.

17. In the 2<sup>nd</sup> phase, targeted at "Consolidating and relaunching the Program", it aimed to create notoriety among the external public, continuing the dissemination sessions initiated in 1<sup>st</sup> phase, and through the social networks launch that were gaining importance in this implementation phase. If the goal of creating "public notoriety", in the beginning of the 2<sup>nd</sup> phase, may have been achieved, this notoriety has faded over time as demonstrated by the inquiry results. The PO ISE's notoriety is, in fact, reduced among the general public and the final recipients. Although these survey results must be contextualized in relation to the information collection time, they indicate that the bet on relaunching the OP, the 2<sup>nd</sup> phase objective that still takes place, with initiatives with greater potential to reach the general public and final recipients, such as TV, radio, press and digital media campaigns, have been very limited in time, with significant effects on notoriety.

18. The dissemination and communication actions developed clearly have a larger impact on the most established public, particularly with the IB, BREPP, SB and beneficiaries in general, who are more involved and closer to the OP. In this sense, there is room for this public to become an ambassador / key point of PO ISE's brand dissemination and expansion, increasing its notoriety with the final recipients. Although, there is some beneficiaries' involvement in the PO ISE's dissemination campaigns, through posts sharing, participation in clarification sessions, in content identification for making videos, this is very limited to fulfillment with legal obligations.

19. The 3<sup>rd</sup> phase, targeted at "Disseminating results and monitoring", began, simultaneously with 2<sup>nd</sup> phase, and were implemented some actions. The objective of monitoring was achieved, although there is no implemented system, with a set of indicators and evaluation metrics. Every year, monitoring is supported by reporting the actions carried out to the European Commission in the execution reports without, however, a results achieved assessment. Currently, there is a focus on the OP's results achieved dissemination, especially through the dissemination of good practices, giving relevance to the publication of storytelling videos on social networks.

20. The PO ISE has monitored its communication actions/initiatives, however, only in a logic of its description. The non-definition of results metrics to be achieved penalizes monitoring in the logic of measuring the results achieved. In this sense, it will be advantageous not only to define results metrics, but also to reflect on the typology of evaluation metrics stipulated by the CS, particularly regarding digital communication, such as social networks. The parameter that allows to appreciate the evolution of the different networks should not be limited to the number of followers, but it is necessary to consider a wide set of indicators, such as the (average) number of likes in posts, comments, shares or, also very important, the number (average/total) of user redirects to the corporate Portal. In the case of the newsletter, it would be important to measure the number of individuals who read it effectively and eventually from them develop some interaction.

### **In relation to Efficiency**

21. The absence of programmed values for the different implementation phases and actions typologies inhibits the confrontation with the funds effectively allocated in their implementation, which hinders the efficiency analysis by the comparative impossibility of the programming rationale with the effective

access costs to the communication market.

22.The PO ISE's CS has a financial resources allocation below of the majority of the OPs, that represents, only about 0.05% of the total ESI resources allocated to the PO ISE, which given the scope of the OP hinders its knowledge.

23.Until 31.12.2021, were carried out €743.304,07 of expenses in communication activities, value below the €1.4 million foreseen in programming (€175,000 per year over 8 years), which represent about 53% of the total scheduled allocation, which could give space to implement communication actions/initiatives targeted at mitigating the notoriety gap among the most directly involved in the OP's implementation.<sup>1</sup>

24.The evaluation identified some constraints related with the proportionality weighting between costs and results, since the actions implementation depends on the context. The comparison establishment, in a possible benchmarking process, assumes similar frameworks, which in communication is an exercise of high uncertainty, especially regarding social networks, which need to consider the context of audiences, as well as the limitations of associated algorithms and professional production of content.

### **In terms of impacts**

25.The work carried out in the ToC formulation allows us to conclude that the impacts chains attenuate the anticipated changes as the target audiences are move away from the PO ISE's implementation "heart". There is an effective gap in the OP's notoriety/recognition among the most directly involved in PO ISE's implementation target audiences (general population and the final recipients of the support).

26.The evaluation concluded that there are several mediations until the OP reaches those target audiences, due to the existence of IB and other beneficiaries, which will either require reconsideration of the communication actions used, or are not controllable by the PO ISE's CS. The significance concerning to the progress margins of the CS's implementation considering to these differences is very significant.

27.The evaluation also concluded that there is significant potential to re-order the priorities for mobilizing the communication initiatives/actions portfolio undertaken by the PO ISE's CS, dynamically combining processes and communication materials based on a social networks' centrality, managed more proactively, associating a lower weight of the more institutional communication materials.

### **General conclusions**

28. The strategic objectives PO ISE's CS are ambitious and can be organized into two types:

- Objectives concerning the OP (information about the OP, segmented by publics supported by the programme, in line with the OP strategic objectives, contribution for generating the demand to OP support, mainly in operations showing less cement demand, communication of the OP results, consolidation of the PO ISE corporate brand affirmation)
- Broader objectives associated do the PO ISE's contribution for disseminating a more positive

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<sup>1</sup> As the evaluation is reported to 31.12.2021 are not being considered activities developed in 2022, that will increase the execution levels in relation to the communication activities initially programmed in the Communication Plan.

global perception of the ESIF (particularly ESF) use in Portugal and to the contribution for generating a more positive perception about the growth model regarding to employment and social inclusion policies and gender equality and full citizenship.

29. With an ambitious formulation, the PO ISE's CS responds with a set of diversified communication initiatives/actions, which covers many types of communication initiatives/actions, generally used in this kind of process. Although with a less significant financial allocation than most PT2020's OPs, there is no evidence that this appropriation has conditioned the implementation of planned initiatives/actions. To this extent, it can be concluded that the existing communication impact deficit in planned and implemented actions will not be related to the actions/initiatives typology in itself, but rather to other aspects, such as dynamic combinations of unexplored actions, such as: more intensive and professionalised management of the communication initiatives, the use of more innovative communication formats or the creation of intermediation processes between the launch of communication initiatives and the target audiences that are intended to be achieved as the personalities mobilization ("ambassadors" or "influencers")."

30. The PO ISE's CS has not been able to counteract the low degree of OP's notoriety, especially among the general population. This low level of PO ISE's notoriety, among the general public, may have several explanations, some possibly related to the way in which communication tools are being triggered, but also due to aspects that CS cannot control, such as the relevance of media agendas that highlight a poor perception of the use of ESI Funds in Portugal, the fragmentation of the PT2020's corporate image or public perceptions that do not value the OP's contributions to the employment and social inclusion public policies. Regarding to the CS implementation, the option of executing communication initiatives in wide-ranging media, such as television, to reach a wider audience was very small and concentrated in the initial phase, which aimed to create brand awareness, and it is understandable that the notoriety levels have been reduced, in the general population, in the following phases of the CS implementation.

31. The OP's notoriety degree, with the final recipients, is also low. Although about half of the final recipients surveyed report that they know the PO ISE, the vast majority report that they have "only heard of" and only about 5% identify the PO ISE as the beneficiary OP of the measure from which it has benefited. Most of respondents do not spontaneously identify the OP funding and, among those who succeed, the first reference is to the beneficiary entity with which they contacted the most directly. To this extent, the role of beneficiary entities in the PO ISE's CS implementation is fundamental to increase the PO ISE's notoriety, because these entities have a closer relationship with the final recipients supported by the OP.

32. In addition, regarding with the progression of the PO ISE's CS impact, in the short remaining implementation of the CS, it is in the mitigation of the notoriety gap and recognition among the two targets (general population and final recipients) that there is greater potential for development. However, it should be considered that other initiatives are competing in the framework of the PT2020 communication, to mitigating the communication fragmentation between the different OPs with a large diversity of logos and images that do not reveal a common identity.

33. The PO ISE has created an appealing brand, although its acronym is not explicit and even complex, that managed to pass to beneficiaries and final recipients the image advocated in the OP's CS: a logo that represents the people inclusion and transmits a positive and motivational energy placing people



and their diversity and needs as the central point.

34. The PO ISE's CS implementation is the responsibility of a very small team, which is an important contextualization element of the concrete conditions under which the CS implementation takes place, particularly in a time with increasing interdependence of the various communication tools currently available, whether they are more traditional or innovative, such as digital media. This phenomenon has contributed to the substantially more difficult it is to establish success parameters for each communication tools. With the widespread proliferation of digital communication instruments, there is a strong tendency towards the operationalization of network strategies aimed at sharing relevant content, making it particularly difficult to analyze the results of each instrument isolated. This reality has brought with it a greater preponderance of content strategies, in relation to the classic instrumental strategies, especially regarding the digital universe and social networks that require a greater specialization of the human resources involved.

35. It is important to point out that the non-definition of results metrics to be achieved by the POI SE penalizes monitoring in the logic of measuring the results achieved and does not clearly identify which communication instruments/initiatives were most effective in meeting the CS objectives recommended.

## Recommendations

As mentioned above, given the current programming period advanced stage, most of the recommendations made are for the new OP with Social Inclusion measures and PT2030 Managing Authority, except for R1 (PO ISE) and R4 (AD&C). The following table lists the main recommendations made and their implementation actions.

RECOMMENDATIONS	MAIN ACTIONS
<b>R1.</b> In the very short term and, still in the last phase of the PO ISE CS, it is recommended to <b>explore new combinations of communication</b> initiatives aimed mainly at increasing notoriety among the PO ISE final recipients, very focused on the results dissemination from the implementation of supported projects.	Life stories dissemination on social networks; Presence in television program headings through <i>storytelling</i> ; Creation of infographics focused on the impacts of the number achieved by the OP in social networks and press; Final event organization for OP results dissemination.
<b>R2. Promote actions that bring the</b> general public closer and involved, especially focus on <i>storytelling or other actions</i> that allow deinstitutionalizing the future OP with Social Inclusion and Employment measures brand and brings the final recipients to the CS center, leading them to be themselves "brand ambassadors". Those actions allow to create brand awareness for the future OP by associating the OP with the final recipients' experiences and not just "brand by brand"	Storytelling actions supported by a script that gives "reality" to the story of each, which can be told in different formats, having as a common point the association with the OP actions and how they influenced /changed their lives; Campaigns in mass media as advertising spots on television; More integrated communication initiatives that explore online and offline media combinatorial; OP results dissemination in CS initial phases.
<b>R3. Design and promote new participation/involvement forms of the Intermediate and Beneficiary Bodies in the CS.</b> This recommendation aims to create conditions, for IB and Beneficiaries in the CS of the future OP with Social Inclusion and Employment measures, to the implementation and to have a more relevant role beyond the mere compliance with legal rules for communication and visibility of the ESI Funds, in this case ESF, supported processes.	Generate better proximity to the target audiences involved through dissemination or presentation sessions to final recipients with the presence of the OP and the IB or another Beneficiary; Joint communication campaigns of the OP, IB and other beneficiaries to generate greater connection to the OP.
<b>R4. Promote better conditions for cooperation and collaborative communication within the future PT2030 framework</b> This recommendation responds to evidence gathered during the PO ISE CS evaluation process and is based	Common identity creation that allows the public to identify OP more easily with an integrated and single-purpose initiative, creating a positioning that would later leverage the performance of each OP;

RECOMMENDATIONS	MAIN ACTIONS
on the perception formalized, in discussion panels and interviews, about the atomization existing in the communication of PT2020 different aspects.	Seek to influence media agendas with a view to disseminating the good ESI Funds implementation
<b>R5. Promote a more proactive management of digital media, especially social networks</b> , with the aim of targeting audiences and creating a greater and more comprehensive notoriety of the future Program with social inclusion and employment measures.	Creation of multidisciplinary communication teams capable of networking and focused on thematic objectives; Mobilization the participation of connotated personalities with a high level of frequency on the social networks; Paid advertising on social networks; Betting on different channels such as <i>podcasts</i> ; Design and operationalization of new metrics for CS and social networks monitoring.
<b>R6. Robustness of the communication team</b> for a more integrated and professionalized CS management	Creation of multidisciplinary communication teams capable of strengthening the communication actions mobilized by the OP ( <i>online and offline</i> ); Seek to influence media agendas with a view to disseminating the good implementation of the ESI Funds.
<b>R7. Definition of metrics, indicators and targets</b> that allow the CS monitoring and evaluation, which will allow a more objective and systematic results measurement during the CS implementation period, allowing regular monitoring, deviations signaling and their correction, whenever necessary.	Conception of a set of achievement and result metrics and indicators and the respective CS monitoring and evaluation.