

# OCENA WPŁYWU REALIZACJI INTERWENCJI WSPÓŁFINANSOWANYCH Z EFS NA OGRANICZENIE WYKLUCZENIA SPOŁECZNEGO I UBÓSTWA W POLSCE



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# SUMMARY

## Purpose and context of the evaluation

The primary objective of this study was to assess the impact of the Operational Programme Knowledge Education Development (PO WER) interventions on reducing social exclusion and poverty in Poland, and to indicate possible directions for future support at the national level. **The evaluation focused on projects implemented under Measure 2.5 “Effective Social Assistance”**. Measure 2.5 sought to strengthen social policy monitoring and evaluation processes and to build the capacity of institutions working on social inclusion and poverty reduction. The total budget of the Measure amounted to PLN 259.5 million (including an EU contribution of PLN 219.1 million). In total, 240 projects were implemented (237 competitive, 3 non-competitive). Beneficiaries included central government administration, local government units (JST), social assistance centres (OPS), NGOs, social economy entities (PES), universities, and research institutes. Target groups comprised social workers, OPS staff, labour market institutions, social economy entities, clients of social assistance services, people experiencing homelessness, and refugees from Ukraine.



## Methodology

The evaluation adopted a Theory-Based Evaluation approach to verify the intervention logic and its actual effects. Methods included desk research, individual and group interviews, CAWI and CATI surveys (over 3,000 respondents), case studies, econometric and counterfactual analyses, and an expert panel. Perspectives were gathered from programme managers, project beneficiaries, training participants, and sector experts.



## Main effects of the intervention



- Increased competencies of social workers and institutions – over 10,000 people participated in training and educational activities.
- Improved client service quality in OPS – better tailoring of services to residents’ needs, reduced workload for social workers, and higher trust in client–staff relations.
- Organisational changes – separation of administrative from social work functions; improved facilities and better accessibility for persons with disabilities.
- Strengthened role of OPS as local coordinators of social policy.
- New tools and standards – national OZPS form with national monitoring system, STRATEGOR planning tool for evaluation and planning of local strategies, and models of cooperation among OPS, CIS/KIS, JST, NGOs, and education/health sectors.

Unplanned positive effects included especially:

- inspiration to establish Social Services Centres,
- emergence of local community leaders,
- improved cooperation among OPS, schools, police, and NGOs, and
- increased public trust in institutions.

Unplanned negative effects mainly concerned small OPS struggling to maintain the separation of social and administrative work and initial client confusion caused by new organisational structures.

### Implementation barriers

Key challenges faced by beneficiaries included:



- COVID-19 restrictions (training and contacts),
- the war in Ukraine (additional burdens for OPS and JST),
- organisational issues (recruitment difficulties, shortages of specialist trainers), and
- staffing constraints in the smallest OPS (limited durability of effects).

### Complementarity of Measure 2.5 projects

Support under Measure 2.5 complemented a wide range of 2014-2020 Cohesion Policy projects. National-level actions in PO WER (systemic solutions and staff upskilling) were complemented by regional measures targeting individual recipients to foster social and labour market activation. All beneficiaries who introduced organisational changes in OPS subsequently implemented, after 2019, active inclusion projects financed from regional funds.



### Assessment of selected models and tools

#### Organisational changes in OPS

The overall assessment of the implementation of projects of this type, which involved introducing changes to the organizational structure of social assistance centres by separating the administrative procedure from social work, is decidedly positive. The support made it possible to improve the quality of client service and to strengthen the institutional capacity of OPS, while additional components – training and equipment upgrades – consolidated the changes introduced. The projects supported not only OPS clients but also the institutions' own employees, which complemented other cohesion policy interventions. Without funds from Measure 2.5 of the Operational Programme Knowledge Education Development, most OPS would have had limited opportunities to access similar support. Looking ahead, however, it remains crucial to ensure stable staffing and financial resources for social assistance institutions and to continuously prepare their employees to respond to changing needs and social challenges.



### New Model of Cooperation for Social Employment Institutions

The solutions developed under the project “A New Model of Cooperation for Social Employment Institutions” were aimed at developing social services – including community-based services delivered by social economy entities – by combining labour-market

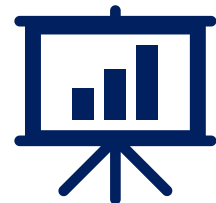


activation with the building of a coherent system of services. Survey respondents assessed the model through the lenses of effectiveness, usefulness, and sustainability, highlighting improved coordination and the possibility of launching and expanding the scope of community-based services as well as their professionalization. At the same time,

implementation barriers were identified (including the varied capacity of local partners). The training component was evaluated positively – the participants reported gains in job-relevant competencies, which facilitated the practical rollout of the model in the municipalities where it was tested. Specific strengths and weaknesses of the model were also noted (e.g., organizational benefits versus coordination burdens). Overall, the model proved to be a useful tool for structuring cooperation among social integration centres/clubs, social assistance centres/local government units, and other public-sector entities, although its effectiveness depends on local capacity for cooperation and the maintenance of partnerships.

#### **A tool for aggregating, analyzing, and monitoring—at the national level—data derived from the assessment of social assistance resources carried out at the level of local government units (JST)**

Developed by MRPiPS and IPiSS, the tool modernized the OZPS form and introduced mechanisms for nationwide data aggregation, analysis, and monitoring – linking JST reporting with the Central IT System and the statutory requirements of the Social Assistance Act (Art. 16a). Implementation covered needs assessment, design of models/indicators and dashboards, system development and deployment, and training for government and local administration, with a user “self-study” guide. Users applied the tool in planning, monitoring, and reporting; flexible functions enabled broader analyses in social inclusion. Usefulness and training support were rated positively, despite some functional limitations. Strategically, the tool strengthened an evidence-informed decision culture.



#### **Intersectoral Cooperation Model**



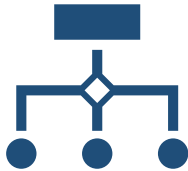
Three cooperation models were developed between social assistance institutions (OPS, PCPR) and entities from other sectors – education, health, the judiciary, the police, and NGOs – separately for rural communes, urban–rural communes, and urban communes (with over 20,000 inhabitants). Their objectives were: more effective support for individuals and families at risk of exclusion, improved service accessibility, increased effectiveness and coherence of actions, avoidance of duplicated support, development of local partnerships, and utilization of community resources.

The study showed that the models offer high potential benefits, but their implementation is limited (only 7% of institutions declared participation in implementing the model). The main barriers include a lack of motivation and clear benefits for partners, legal and organizational

differences between institutions, the need to adapt the models to local conditions, and shortages of staff and competencies in intersectoral cooperation.

### **Strategor**

The aim of the project was to develop a tool to support local government units in strategic programming in the area of preventing poverty and social exclusion.



The project was addressed to local government units, including social assistance organizational units, social assistance and social integration institutions, and other entities important for social inclusion and combating poverty. The direct beneficiaries of the support were employees of local government units, including staff of social assistance centres and municipal offices.

The Strategor tool offers potential users: free access to educational materials and tools supporting strategic planning; improved quality of local social strategies – better planning, monitoring, and evaluation; facilitation of maintaining a methodological standard in social and social-inclusion strategies; and opportunities for knowledge and experience exchange via platforms, webinars, and advisory contacts.

Strategor is a very good, substantive tool with high potential usefulness. Its rollout was accompanied by widely scaled, highly rated training. However, only a small share of institutions declare that they use this tool. Despite more than 2,000 municipalities having been trained to use STRATEGOR, only 32% applied the tool in practice, and just over one third of them continue to use it. The main reason for non-use is that strategy development is outsourced to an external firm – nearly half of the institutions that did not use the tool cite this justification. Others point to ingrained habits, their own ways of working, lack of time, and the fact that Strategor requires familiarization with a large volume of materials.

### **Assessment of Educational Activities**



The study showed that as a result of the support implemented under Measure 2.5 projects, the competencies and qualifications of the vast majority of employees of social assistance and social integration institutions, as well as social workers employed outside the social assistance and integration system, increased. The relevance of the trainings should be assessed as very high – the

training scope responded to the problems that participants encounter in their everyday work. The usefulness of the trainings should also be considered high – three-quarters of training participants declared that they use the knowledge and skills acquired during the trainings in their daily work, and just over half of respondents observed that after completing the training they achieve better results at work. A change in professional position as a result of training was a relatively rare outcome; where the trainings did have effects on professional position, these were more often soft outcomes – recognition by colleagues and supervisors and greater opportunities for career advancement.

### **Statistical Verification of Intervention Effects**



There is no statistical evidence that the support implemented under Measure 2.5 had a statistically significant impact on reducing poverty and social exclusion in Poland. This stems from the very limited value of projects carried out under Measure 2.5, which in total accounted for a very small share of the central government's overall social assistance expenditures in 2015–2023.

While there are studies confirming that budget expenditures on social assistance contribute to reducing poverty in Poland, due to the small share of Measure 2.5 projects in those expenditures, there is no statistical evidence of their significant impact on this phenomenon.

In the case of the developed models and tools, only for organizational changes can a positive and statistically significant net effect of projects implemented under Measure 2.5 be confirmed. The positive net effect of organizational changes is 1.23 percentage points (5.99–4.76), which means that in municipalities that introduced organizational changes, the improvement in the quality of social assistance is 1.23 percentage points greater than among municipalities that did not introduce such changes.

In the remaining cases, the net effect is statistically insignificant, which means that the projects implemented did not have a significant impact on changes in the social quality indicator.

### **Achievement of Intervention Objectives**



With respect to the achievement of intervention objectives, under Measure 2.5 almost all target values of the key indicators were reached (in some cases they were even clearly exceeded), as were the vast majority of project-specific indicators. Any minor issues in meeting the assumed indicator values concerned primarily the number of trainings organized and their participants; these were mainly caused by constraints related to the

pandemic.

### **Intervention Logic**

The evaluation confirms that the intended cause-and-effect chain of the support functioned correctly. Investments in upgrading staff competencies and organizational standards translated into better organization of work in OPS, which in turn led to higher quality of client service. The conclusions established in the evaluation were based on a combination of multiple research sources: interviews and surveys with staff and management, a review of documents, and the results of statistical and econometric analyses. Participants in the Measure 2.5 PO WER intervention pointed to real, non-promotional benefits: more orderly procedures, clearer team roles, greater confidence in action, and improved local cooperation (with JST, CIS/KIS, NGOs). Changes were also evident in workplace culture: a stronger orientation toward learning, sharing good practices, and using planning and monitoring tools. At the same time, the effects were not distributed evenly. In the smallest centres, limited staff numbers and turnover hindered the consolidation of changes, and differing levels of organizational readiness affected the pace of implementation and the durability of the intervention. Some activities were short-term in nature, requiring continued support to prevent the loss of improvements achieved. Overall, the intervention logic proved sound and was borne out in practice. Strengthening staff competencies

and the functionality of structures leads to better services although the scale of results depends on local implementation capacity and the maintenance of support over time.

## Conclusions and Recommendations



Measure 2.5 of the Operational Programme Knowledge Education

Development has genuinely contributed to improving the quality of social assistance in Poland. The projects enabled the professionalization of staff, the development of new tools, and better service for OPS clients.

Although implementation barriers and disparities exist, the overall balance of the intervention is clearly positive, and the solutions developed should be maintained and further developed under FERS (European Funds for Social Development).

Based on the study results, the following recommendations were issued:

- The training and advisory activities for social assistance staff should be maintained and expanded. It is crucial to ensure continuity of training and to update it in line with emerging needs and challenges.
- In future, any organizational changes in OPS should be designed in a way that takes into account the specific nature of work in both small and larger centres.
- Disseminate/ensure the availability of the developed models/tools/solutions through a well-organized knowledge repository – create an information platform on which structured descriptions of the developed products would be available.
- It would be advisable to undertake actions (under FERS and/or regional programmes) aimed at increasing the number of certified social work supervisors.
- Proposals concerning the creation of universal models/tools (as included in applications for support) should obligatorily include a stage for evaluating the application of the developed tools.
- It is advisable to carry out a review of the tool for aggregating, analyzing, and monitoring – at the national level – data derived from the assessment of social assistance resources carried out at the level of local government units (JST) and, based on the conclusions of the review, decide on any improvements/modifications.