

Summary of the EVAL Release 2.0

Release date 29/03/2018

1. NEW FUNCTIONALITY 'OPERATIONAL EVALUATION PLAN'

The screenshot displays the 'Operational Evaluation Plan' interface within the EVAL MODULE. It features a table of evaluation plans with the following columns: CRIS ref, Title, Evalu., OM in charge, EU Contribution, Project start, Project end, DAC Sector, Modality, Instrument, KPI 5, KPI 6, Date of lat., ROM planned, Evaluation pla., and Reas.. The table lists several evaluation plans, including 'Gestion administrative systèmes d'inform...', 'CRIS - ABAC - FED 2016', 'CRIS - ABAC - FED 2017', 'Crédits 2015 pour l'informatique - BA A...', 'Crédits BA ATA 2017 destinés à l'inform.', 'CRIS - ABAC - FED 2018', 'Crédits BA-ATA 2014', 'GESTION ADMINISTRATIVE CRIS-ABAC...', and 'Crédits 2015 - BA ATA, contributions D...'. The interface also includes filters, a search bar, and buttons for 'Plan Evaluation' and 'Export to Excel'.

The EVAL Module has been enhanced with a new functionality that allows HQ Units and Delegations to prepare and submit their annual planning of evaluation activities online; this is accessible through a new tab called 'Operational Evaluation Plan'.

The main advantages of this new EVAL functionality are:

- No re-encoding of evaluations from an Excel planning sheet to EVAL and vice versa;
- Possibility to keep the Operational Evaluation Plan (OEP) up-to-date during the year, and to export an Excel updated version at any time, in just one click;
- Easy registration of OEPs in Ares;
- Possibility to consult OEPs of other Units and Delegations online.

This new functionality replaces the 'P/P Portfolio' tab with additional features **including:**

1. An enhanced portfolio visibility, with a comprehensive list of contracts and decisions and **new** data:
 - View all evaluations related to a specific CRIS reference;
 - Operational Manager in charge;
 - Modality (Project, Budget support);
 - Instrument
 - EAMR KPIs **5** and **6**;

- Date of latest ROM report;
- ROM planned (Yes or No);
- Evaluation planned (Yes or No);
- Reason for evaluation.

2. The possibility to filter CRIS references by:

- EU contributions **equal** or **greater** than **5M€**;
- EU contributions **equal** or **greater** than **750.000€**;
- EU contributions **lesser** than **750.000€**;
- Presence in the EAMR list of projects;
- End date of activities in the last three years;
- Evaluations planned, ongoing or complete;
- No evaluations planned, ongoing or complete.

Multiple filters can be added, or removed, to narrow down your search on CRIS references. Each column in the 'Operational Evaluation Plan' tab can be filtered (except KPI 5 and 6 for which a filter will become available in an upcoming version of EVAL).

3. The planning of an evaluation covering **1 or more** selected CRIS reference(s);

4. The OEP of your Unit/Delegation for the current year located in a dedicated library as a detailed Excel file.

Operational Evaluation Plan		Submitted Operational Evaluation Plans	
Delegation / Unit in charge: DEVCO R 04 - Information Technology, Document Management			
2018	Excel file Operational Evaluation Plan submitted on 08/03/18 by Jerome DELDYCKE evaluation_plan_DEVCO R 04_08_03_2018.xlsx	ARES registration number ? Test	

Important note for DEVCO users: if you have sent your 2018 OEP to the Evaluation Unit and to the ESS following the note sent by the Director-General Stefano Manservigi on 31/01/2018 (Ref. Ares(2018)588478), the ESS will encode your 2018 planned evaluations for you. You will be informed when this will be done.

Starting with the 2019 OEP, OEPs will be submitted once a year by your Delegation / Unit coinciding in time with the preparation of management plan.

2. ENHANCED PROCESS FOR ASSESSING THE QUALITY OF THE FINAL REPORT

2.1 DRAFT QAG AT SYNTHESIS PHASE

The Quality Assessment Grid (QAG) has been simplified, and additional guidance developed; the QAG is now available starting from the draft version of the final report (synthesis phase). The Contractor will be able to comment on the QAG Draft report on the system, making the entire process more open and transparent.

After the submission of the draft version of the final report by the Contractor, the Evaluation Manager will prepare the QAG Draft report, and share it with the Contractor. The Contractor will be able to respond to the Evaluation Manager's comments directly in the template, or to accept all the comments.

The Contractor can use the QAG Draft report (and the detailed comments by the Evaluation Manager to the report itself) to finalise the report.

After the delivery of the final version of the report, the Evaluation Manager will be able to update the content of the QAG, taking into account the Contractor's comments and the improvements brought, or to set the content of the QAG Draft report as final.

2.2 NEW QAG TEMPLATE

The content and design of the QAG template have been changed. The assessment criteria were shortened and clarified for easier readability, more accurate grading and better commenting (strengths and weaknesses of the assessed topic).

Legend: scores and their meaning

Very satisfactory: criterion entirely fulfilled in a clear and appropriate way
Satisfactory: criterion fulfilled

Unsatisfactory: criterion partly fulfilled
Very unsatisfactory: criterion mostly not fulfilled or absent

The evaluation report is assessed as follows		
1. Clarity of the report		
This criterion analyses the extent to which both the Executive Summary and the Final Report: <ul style="list-style-type: none"> Are easily readable, understandable and accessible to the relevant target readers Highlight the key messages The length of the various chapters and annexes of the Report are well balanced Contain relevant graphs, tables and charts facilitating understanding Contain a list of acronyms (only the Report) Avoid unnecessary duplications Have been language checked for unclear formulations, misspelling and grammar errors The Executive Summary is an appropriate summary of the full report and is a free-standing document 		
Strengths*	Weaknesses*	Score*
test	test	Very satisfactory
Contractor's comments		
test	test	
2. Reliability of data and robustness of evidence		
This criterion analyses the extent to which: <ul style="list-style-type: none"> Data/evidence was gathered as defined in the methodology The report considers, when relevant, evidence from EU and/or other partners' relevant studies, monitoring reports and/or evaluations The report contains a clear description of the limitations of the evidence, the risks of bias and the mitigating measures 		
Strengths*	Weaknesses*	Score*
test	test	Very satisfactory
Contractor's comments		
test	test	

The new assessment criteria are:

1. Clarity of the report;
2. Reliability of data and robustness of evidence;
3. Validity of findings;
4. Validity of conclusions;
5. Usefulness of recommendations;

6. Appropriateness of lessons learnt analysis (if requested in the Terms of Reference or included by the evaluators - **optional**);
7. Final comments on the overall quality of the report.

A short definition of each of these criteria is provided in the QAG template; further guidance is available by clicking on the different icons ①, that are included in the template.

The scoring system consists of 4 choices: **Very satisfactory**, **Satisfactory**, **Unsatisfactory** and **Very Unsatisfactory**. A brief explanation of each score is shown in the template. Adding a comment is now mandatory for each criterion.

3. NEW TYPES OF EVALUATIONS

The EVAL Module, which until now could only handle Project/Programme evaluations, can now handle also **Country sector level**, **Thematic** and **Budget Support evaluations**. The type of evaluation is to be selected from a dropdown menu when creating a new Evaluation.

4. DAC SECTORS OF CONTRACTS

EVAL now retrieves the DAC sectors of the contracts under the evaluated decisions. The DAC sectors are displayed in the Evaluation Data section of the 'General' tab.

5. SORTING OF EVALUATION IN 'MY EVAL' TAB

Evaluations displayed in the 'My Eval' tab are now sorted by on-going evaluations displayed first (the list will display evaluations with the closest upcoming deadlines first), then the completed ones.

6. 'SEARCH' TAB IMPROVEMENTS

6.1 DELETE ALL DAC SECTORS

When searching for evaluations using "DAC Sector code covered" in the 'Search' tab, a button "Clear" was added to delete all previously selected DAC codes from the list.

6.2 LAUNCH A SEARCH BY USING THE "ENTER" KEY

A search can now be launched by using the "Enter" key on your keyboard.