

Chapter 4 - Synthesis Phase

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EVAL Manual for Evaluation Contractors > 4. Synthesis Phase

Table of Contents

- 4. Synthesis Phase

4. Synthesis Phase



Watch the [E-Learning video](#) for this step

- If your notifications are enabled, you will receive an e-mail reminding you to submit the final report and executive summary. Please copy the link in the notification e-mail and paste it into Mozilla Firefox. Alternatively, open your evaluation the EVAL module and go to the "Management" tab.
- Upload and submit the final report as described in Chapter 3.2 – Upload and submit the Inception, Desk and Field Reports.
- The executive summary must be submitted separately.

To make the executive summary fully searchable, this must be submitted via EVAL using the specific PDF or web form.

GeneralEvaluation stakeholdersManagementLibrary

Evaluation Management

PhaseSynthesis

Deadline01/02/2018

Documents

The mandatory documents of the phase Synthesis are the Final report and the Executive Summary. Please make sure you uploaded them and submit them for approval within the deadline.

Select	EN	Title	Version	Category	Author	Updated on	Status	Submitted on	Approved or not agreed on	Approver	Comments
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test	1	Report	Jerome DELDYCKE	19/12/2017	Final	14/12/2017	04/01/2018	fn-x55b242 ln-x55b242	

Download selected documents

Resend approval e-mail to contractor

Upload Documents

The template for the Executive Summary can be downloaded below. Once filled in, it can be uploaded by clicking on "Upload pdf version".

Alternatively, the Executive Summary can be filled in directly via this interface by clicking on "Fill in the executive summary web version form".

Available Executive Summary PDF template

ENFR

Executive summary

UPLOAD PDF VERSION

Fill in the executive summary web version form

The language is the Evaluation's language

- If you opt for the PDF form – in this case, you will have to save the file on your computer and will be able to work on it even if you have no Internet connection:
- Download the PDF form to your computer by clicking on the PDF icon under "Available Executive Summary PDF template". The template is available in English and French – please select the language corresponding to the evaluation. If the language of the evaluation is Spanish or Portuguese, please download the template in English.
 - Save the file to your computer. The first page is pre-filled with data retrieved from CRIS and EVAL. All the other fields must be filled in.
 - Upload the filled template to the system by clicking the

UPLOAD PDF VERSION

 button.
- If you opt for the web form, all information provided will be saved directly in the system:
 - Click on the "Executive summary web version" button (as illustrated above) and fill in the form directly in the module. Note that all fields must be filled in.
 - From time to time, save your work. **Note that the EVAL module allows you to save even if there is missing information:** in this case, the tabs and the fields with missing information will be displayed in red. When done, click on "Save" and then on "Close".

Executive Summary

Description of the project

Evaluation Methodology

Key findings

Conclusions & lessons learned

Recommendations

Description of project

Purpose and scope of the evaluation*

Evaluation Questions*

Methodology*

Limitations*

The field should not be empty

The field should not be empty

The field should not be empty

The field should not be empty

Fields marked with asterisk (*) are mandatory

Close Save

In the table below, you can see the maximum number of characters allowed per each section and subsection of the executive summary:

Section	Subsection	Allowed characters
Description of the project	Background to the project	3000
	Description of the project and its objectives	3000
Evaluation Methodology	Purpose and scope of the evaluation	3000
	Evaluation questions	3000
	Methodology	3000
	Limitations	3000
Key findings	Answer to the evaluation questions	6000
Conclusions and lessons learned Error! Reference source not found.	Conclusions – (minimum 1 and up to 10);	1500 per conclusion
	Lessons to be learned (minimum 1 and up to 10)	1500 per lesson to be learned
Recommendations Error! Reference source not found.	Minimum 1 and up to 10	1500 per recommendation

- Whether you have filled in the executive summary in PDF or web format, a PDF file is generated either way by EVAL and displayed in the documents table, as in the example below. You can download the file to check your work. You can edit the contents of the executive summary by clicking on the pencil icon.

General

Evaluation stakeholders

Management

Library

Evaluation Management

Phase

Synthesis

Deadline 01/02/2018

Documents

The mandatory documents of the phase Synthesis are the Final report and the Executive Summary. Please make sure you submit them for approval within the deadline.

Select	EN	Title	Version	Category	Author	Updated on	Status	Submitted on	Approved or not agreed on	Approver	Comments
<input checked="" type="checkbox"/>		Test	1	Report	Jerome DELDYCKE	19/12/2017	Final	14/12/2017	04/01/2018	fn-x55b242 In-x55b242	
<input checked="" type="checkbox"/>		Executive S...	1	Executive Summary	Lot ENI ROM CONTRACTOR	04/01/2018	Draft				

Download selected documents

Resend approval e-mail to contractor

Upload Documents

The template for the Executive Summary can be downloaded below. Once filled in, it can be uploaded by clicking on "Upload pdf version". Alternatively, the Executive Summary can be filled in directly via this interface by clicking on "Fill in the executive summary web version form".

Available Executive Summary PDF template

EN FR

Executive summary

UPLOAD PDF VERSION

- When ready, submit the executive summary for approval by the Evaluation Manager.
- You may upload additional documents, such as Annexes to the final report, by using the "Upload documents" button and choosing the appropriate category and language.

Evaluation Manager

General Evaluation stakeholder

Phase Inception

Methodology Tips

Documents

Select	EN	Title
<input type="checkbox"/>		inception re...

Share selected documents with your stakeholders

Download selected documents

The evaluation is currently under Inception phase. If you consider this phase as completed, you may want to advance to the next phase. Click on the button 'Next phase'.

Deadline 28/05/2017

Approver Comments

Valentina ARASSI

Upload document

Document details

TITLE*

PHASE* Inception

Category*

The mandatory document is marked with an asterisk (*)

Fields marked with asterisk (*) are mandatory

Annex

Comments document

Minutes

Response documents

Other

Upload Documents

Next phase

- Once you have uploaded the final report, the Evaluation Manager will receive a notification. The first version of the final report will be sent in consultation for comments to the reference group members.
- The Evaluation Manager will assess the quality of the report by completing the draft QAG template in the module. The QAG template ("quality assessment grid It should be noted that the assessment of quality must enhance the credibility of the evaluation without diminishing its independence. Therefore, it focuses on how the conclusions are presented and explained and not on their content. The quality assessment should not be entrusted to the persons involved in the project / programme being assessed. ") is included among the terms of reference templates. This is a draft version of the QAG. The first draft version of the QAG is shared with the Contractor in EVAL. The Evaluation Manager and the evaluation Contractor discuss the quality assessment and the Contractor will also have the possibility to reply to the Evaluation Manager comments in the QAG itself..

General Evaluation stakeholders Management Library

Evaluation Management

Phase: Synthesis

Deadline: 11/08/2018

Documents

In order to proceed with the uploading of your next draft report, please accept the QAG or respond to the comments that have been formulated.

Select	EN	Title	Version	Category	Author	Updated on	Status	Submitted on	Approved or not agreed on	Approver	Comments
<input type="checkbox"/>		Final Report	1	Report	Jerome DELDYCKE	10/04/2018	Not agreed	10/04/2018	10/04/2018	- USER TEST	Not agreed
<input type="checkbox"/>		Executive S...	1	Executive Summary	Jerome DELDYCKE	10/04/2018	Submitted	10/04/2018	10/04/2018	- USER TEST	
<input type="checkbox"/>		QAG draft r...	1	QAG draft report	- USER TEST	10/04/2018	Draft	10/04/2018			

Download selected documents

Upload Documents

Accept the QAG

Reply to the QAG

Click on the **"Accept the QAG"** button if you agree with the Strengths and Weaknesses of the assessed topics or click on the **"Reply to the QAG"** button to comment on the QAG.

Action (Project/Programme) evaluation - Quality Assessment Grid Final Report

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:

- 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***

fds fds Very satisfactory

Contractor's comments **Contractor's comments**

2. Reliability of data and robustness of evidence

This criterion analyses the extent to which:

- 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

Add your comments in the blue "Contractor's comments" boxes found throughout the template. You can also upload a separate document with your comments in EVAL by choosing "Other" as document category.

1. If the Evaluation Manager does not agree with the Final Report and or executive summary, these will be sent back for review, you will have to upload a revised version:
2. The revised version can be uploaded and submitted as described in [Chapter 3.2 – Upload and submit the inception/desk/field reports](#).
3. After approving the final report and the executive summary, the Evaluation Manager will, if necessary, attach a note explaining the reasons why certain quality improvement requests have not been treated. He will then proceed to the QAG phase.

[Chapter 3 - Inception, Desk and Field Phases](#)

[Chapter 5 - QAG Phase](#)