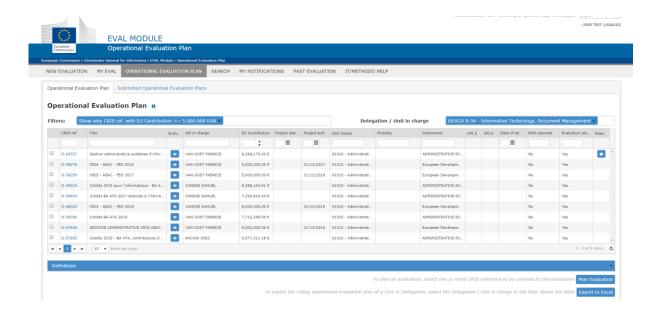<div style="text-align:center">

Summary of the EVAL Release 2.0
Release date 29/03/2018

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1. NEW FUNCTIONALITY 'OPERATIONAL EVALUATION PLAN'

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.

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 Manservisi 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).

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 ⓘ, 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.