

Interact seminar
“Evaluation – how does it go?”

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Investing in Opportunities

Terms of Reference

Framework Contract or not?
How tos of implementation



How to procure:

- Individually
- Or together = a framework contract – law permitting

NWE: Framework contract for the delivery
of the **entire evaluation plan**

Framework contract

Pros:

- ✓ Consistency and continuity of service = global/integrated approach
- ✓ Some flexibility – NWE not fully bound
- ✓ Breach of contract possible if quality of the first evaluation unsatisfactory

Cons:

- Procurement timeframe slightly longer than a single contract (max. 3 months) - we did it in 6 weeks!
- The framework contract doesn't imply cost savings

Single contract – Individually procured evaluations

Points of consideration:

- ✓ **Quality** of evaluations might **vary**, depending on the sub-contractor(s) chosen
- ✓ A possibility of different sub-contractors to deliver the implementation evaluations **(mid-term) before** the choice is made for the final **impact evaluation**
- ✓ Delivery might be more time and effort consuming for the contractors due to **no previous knowledge** about the programme

Single contract – Individually procured evaluations

Points of consideration:

- Consistency and continuity of service not possible
- Procurement timeframe shorter than a framework contract (2 months)
- No real cost savings



Consultant advice

ToR formulation

- Clarity concerning the evaluation objective, timing realistic?
- Prevent being too prescriptive in evaluation questions – leave some freedom



Practicalities:

- Mention the necessary skills/expertise/senior consultants required
- Break down the tasks
- Avoid being charged senior consultancy fees for junior consultancy work



DG Regio,
Eval. Unit advice



Thematic focus and content:

- Better to evaluate a few issues deeply than a broad range of issues superficially
- Evaluation questions should bring answers
- Check the additional impacts/benefits
- Do not include evaluation methods
- Make sure evaluation creates links between the elements of the intervention logic
- Selection committee could include and external consultant to help evaluate the offers



General knowledge



- Costs should be justified by the knowledge gained
- Experts should have knowledge/experience in SOs
- ToR more important than the evaluation plan

*Previous evaluation findings/ recommendations
(IVB programme) as a starting point*

ToR elements:

1. Object of the tender and required service

- NWE: Co-design and implementation of an integrated evaluation approach
- Main target groups (Programme authorities, European Commission, beneficiaries)
- Coordination (Evaluation Task Force: MA, MSs, CP, JS)



ToR elements:

2. Definition of needs:

- Individual evaluations as tasks
(3 evaluations = 3 tasks)
- Define the clear purpose of each task
- Describe what the task may cover

General knowledge

ToR elements:

2. Definition of needs - highlights:

- Is the data available or needs to be generated?
- Further quantitative/qualitative info required (e.g. surveys, interviews)
- Desk research: Analysis of other existing data + evidence needed?
- What is the deliverable (report?)
- Type of evaluation questions to beneficiaries and programme authorities



ToR elements:

3. Project management:

- Requirements of defined timetables and milestones
- Senior and junior staff involvement
- Review meetings with the Task Force
- Formal recording of all agreed changes to the evaluation process
- Reporting on spending levels
- Monthly progress report/update
- Participation in meetings, even MC
- A deliverable per payment (inception, draft, final reports)

Ownership of the process: Task Force/Evaluation Group

- Members: MA, MSs, CP representative, JS staff
- Follows the whole evaluation process
- From ToR => conclusions drawn not by, but with the sub-contractors
- **Steers** and makes recommendations in the process
- Makes **recommendations** to the Monitoring Committee
=> **greater ownership**



Contract management - in practice

- Flexibility of the contractor required
- Changing spectrum of requirements
- Numerous revisions (questions, questions... answers?)
- Time frame tight = key steer from JS required
- A lot of time pressure on contractors
- Data generation very challenging – eMS problem!
- Data comparison from different systems tricky
- Solid desk research required
- Interviews with target groups time consuming

A lot in a little time!

Contract management - in practice

- Persistence required to reach the end
- Set clear deadlines per milestone
 - Inception, draft, final report
 - Meetings validating concepts/notes/versions
- Facilitate the process as much as possible
- Make the task interesting to task force and contractors
- Own the process and the outcome
- Refer to ToR if things get complicated

Be proud of the work delivered!

Q&A

Feel free to ask!