

Pre-evaluation

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What does this mean ?

Give feedback well before the deadline

- Play the role of an evaluator
- Understand the evaluation criteria
- Evaluate a proposal draft (maybe 80% ready)
- Provide feedback on:
 - Formal correctness
 - Inconsistencies
 - Clarity in all relevant sections
 - Impact: does it relate to the call?
 - Budget
 - Etc.
- Follow the instructions in the proposal template



- You do not need to be the specialist or expert in the topic area.
- You need to be familiar with the specific part of the programme, e.g. collaborative projects, MSCA, FET, ERC, ...

Proposal template - example

Section 1: Excellence

1.1 Objectives

Describe the specific objectives for the project, which should be clear, measurable, realistic and achievable within the duration of the project. Objectives should be consistent with the expected exploitation and impact of the project.

1.2 Relation to the work programme

Indicate the work programme topic to which your proposal relates, and explain how your proposal addresses the specific challenge and scope of that topic, as set out in the work programme.

1.3 Concept and approach

Describe and explain the overall concept underpinning the project. Describe the main ideas, models or assumptions involved. Identify any trans-disciplinary considerations;

Describe the positioning of the project e.g. where it is situated in the spectrum from 'idea to application', or from 'lab to market'. Refer to Technology Readiness Levels where relevant.

Describe any national or international research and innovation activities which will be linked with the project, especially where the outputs from these will feed into the project;

Describe and explain the overall approach and methodology, distinguishing, as appropriate, activities indicated in the relevant section of the work programme, e.g. for research, demonstration, piloting, first market replication, etc;

Where relevant, describe how sex and/or gender analysis is taken into account in the project's content.



Evaluation Criteria

Type of action	Excellence	Impact	Quality and efficiency of the implementation
	The following aspects will be taken into account, to the extent that the proposed work corresponds to the topic description in the work programme.	The extent to which the outputs of the project should contribute at the European and/or International level to:	The following aspects will be taken into account:

	Excellence	Impact	Quality and efficiency of the implementation
All types of action	Clarity and pertinence of the objectives; Credibility of the proposed approach.	The expected impacts listed in the work programme under the relevant topic	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources; Complementarity of the participants within the consortium (when relevant); Appropriateness of the management structures and procedures, including risk and innovation management.

	Excellence	Impact
Research and innovation Innovation SME instrument	<p>Soundness of the concept, including trans-disciplinary considerations, where relevant;</p> <p>Extent that proposed work is ambitious, has innovation potential, and is beyond the state of the art (e.g. ground-breaking objectives, novel concepts and approaches)</p>	<p>Enhancing innovation capacity and integration of new knowledge;</p> <p>Strengthening the competitiveness and growth of companies by developing innovations meeting the needs of European and global markets; and, where relevant, by delivering such innovations to the markets;</p> <p>Any other environmental and socially important impacts (not already covered above);</p> <p>Effectiveness of the proposed measures to exploit and disseminate the project results (including management of IPR), to communicate the project, and to manage research data where relevant.</p>

	Excellence	Impact
Coordination & support actions	Soundness of the concept; Quality of the proposed coordination and/or support measures.	Effectiveness of the proposed measures to exploit and disseminate the project results (including management of IPR), to communicate the project, and to manage research data where relevant.

Project proposal evaluation



What to do and what to avoid when
you write your proposal...

1 Excellence/Concept

- Just generalities, no relation to the Theme priority

Zero points

- Copies and pastes of the Workprogramme, just listing objectives.

Score 1 or 2

- Clearly identified the objective, their relevance to the WP, in your own words.

Score 3

- Identified the objectives, the approach, clear positioning, stated the relevance *and* explained why it is important and benefits the aims of the WP

Score 4 or 5



2 Excellence / Ambition

- Impossible to figure out what the proposal is aiming at, ambition unclear ...

Score 1

- Nicely described but not very clear what is new. Is it ambitious?

Score 2 or 3

- Clear explanation of the ambition and the innovation potential.

Score 4

- Clear explanation of ambition, innovation potential *and* how the state-of-the-art will be advanced.

Score 5



3 Potential impact

- Issue ducked (there is no impact / impact not actually related to goals of the Theme).

Score 0

- Re-assuring phrases about how valuable this work is going to be.

Score 1 or 2

- Specific impact (from the WP) is clearly identified in detailed terms.

Score 3

- Additionally, outline of measures to maximise the impact *and* how to advance innovation capacity.

Score 4 or 5



4 Quality of the Implementation / Resources

Score 0 Just claiming that resources are adequate

Score 1 Copy and paste of the text from the corporate brochures;

Score 2 Resource plan specific to the project, but only sketched out

Score 3/4 Detailed resource planning, but possibly over/under-estimate

Score 5 Just the right amount of resources, convincingly integrated



5 Quality of the Implementation / Consortium

- Re-assuring phrases about how good the proposal is.

Score 1

- Appended the CVs, but no description of partners' role

Score 2 or 3

- Clear description of who the partners are and how they contribute

Score 4

- Additionally, how they ensure exploitation focused on the objectives addresses, *and* why they are among the best in the business

Score 5



6 Quality of the Implementation / Management

- Re-assuring phrases about how well-managed it's going to be and how experienced the partners are.

Score 1

- Just the standard management plan everybody learned at business school

Score 2 or 3



- Adequately detailed organisation and management plan, clear responsibilities, problem solving mechanism.

Score 4

- Additionally, clear outline of innovation management, risk analysis and contingency plans – all reaching beyond the end of the project

Score 5

Common mistakes in project development

- No respect for instructions. Be intelligent in implementing the instructions. Every word of the policy document has a meaning.
- The text of different parts of a proposal is not consistent so evaluators get confused
- Lack of understanding of Evaluation criteria (objective vs subjective)
- Poor needs analysis and description of the starting point (stakeholders, problems, target groups, state-of-the-art, markets, etc)
- Small relevance for the call objectives
- Insufficient detail given of planned activities as evidence to convince evaluators of impact
- Poor impact analysis



Key factors for success in project development



- Educate evaluators in simple and easy to understand language using references from background documentation;
- Answer evaluators' questions and make sure you understand assessment criteria before you start writing;
- Provide 'just enough' details needs analysis, activity description and impact analysis;
- Provide measurable evidence of your claims from credible info sources;
- Present information in the best format for the readers to understand it.
- Make sure to respect Causality principle: and directly interconnect why – what – how – etc.