

ADVICE AND EXPERIENCES FROM AN EVALUATOR

EU programmes and Marie Skłodowska-Curie Actions

Junker Consult

Helle Junker, Ph.D., M.Sc.

Aarhus University
January 15, 2014



AGENDA

- My background
- The evaluation process
- The good proposal
- Specific for a good MSCA proposal



MY CV IN SHORT FORM

- 1986 M.Sc. from Aalborg University. Ph.D. as industrial researcher 1997
- 4 years R&D at Aalborg Industries
- 3 years teaching at Aalborg University
- Elsam / DONG Energy from 1993 – 2010
- Vestas, kk-electronic and Natural Gas Funen
- Start of **Junker Consult** in 2010:
 - Fundraiser for many companies (DK + EU funds)
 - Project management support
 - Strategic planning, reporting



EXPERIENCE AS EVALUATOR

- Evaluation of FP5 proposals
- Evaluation and review of FP6
- Evaluation of FP7 proposals
- **Evaluation of MSCA Actions**
- Impact assessment of JTI
- Evaluation of EIT progress (KIC: Energy)
- Evaluator for EUDP
- Evaluator for PSO (Energinet.dk)
- Evaluator for STEM (The Swedish Energy Agency)

THE EVALUATION EXERCISE

- "Remote evaluations" and "on location evaluations"
- The introduction in Bruxelles, formalities, alignment and a desk for the individual work
- Reading and the **individual evaluation, marks and comments**
- Time pressure and responsibility
- Consensus meetings
- **Consensus reports**
- Panel meeting and **Evaluation summary report**

EVALUATORS RESPONSIBILITIES

Follow the Code of Conduct for independent experts:

- Declare conflicts of interest
- Provide **independent, impartial and objective** advice to the Commission
- Represent your knowledge and skills, not your employer, nor your country
- **Confidentiality:**
 - no discussions about any proposal except in consensus meeting / final panel
 - no external contacts during or after the evaluation
 - the EC does not reveal your individual opinions (the EC just publishes evaluator names annually)

THE EVALUATION RULES: GUIDING PRINCIPLES

- **Objectivity**

each proposal is evaluated as it is written. However, statement of achievements not to be taken for granted

- **Accuracy**

you make your judgment against the official evaluation criteria, and nothing else

- **Consistency**

you apply the same standard of judgment to each proposal

BASIC EVALUATION PRINCIPLES:

- Excellence
- Fairness and impartiality
- Equal treatment
- Transparency
- Efficiency and speed
- Confidentiality

MARKING RANGE INTERPRETATION

- 0 = The proposal fails** to address the criterion under examination or cannot be judged due to missing or incomplete information.
- 1 = Poor.** The criterion is addressed in an inadequate manner, or there are serious inherent weaknesses.
- 2 = Fair.** While the proposal broadly addresses the criterion, there are significant weaknesses.
- 3 = Good.** The proposal addresses the criterion well, although improvements would be necessary.
- 4 = Very good.** The proposal addresses the criterion **very well, although certain improvements are still possible.**
- 5 = Excellent.** The proposal successfully addresses all relevant aspects of the criterion in question. **Any shortcomings are minor.**

For each criteria with marks and comments that comply

ADVICE FOR PROPOSALS

- The proposal should address the call – **And you need to have a good idea !!!**
- **Good ideas can always be presented short and precise**
- A well written proposal
- **Describe why the project is important and justify the methodology**
- Excite the evaluator within the first 5-15 minutes of reading
- Expect the evaluator to be a **good generalist**
- Make clear what is innovative and beyond the state-of-the art
- **Good illustrations** that can be understood within 5-15 seconds
- Describe project risks and present a mitigation plan
- Follow the Guide for Proposers (the evaluation criteria do so)
- Describe how the **team** can perform the tasks and are **complementary**
- The project coordinator should have clear competences (the evaluator is getting tired)
- An **end user** as coordinator is great otherwise highlight the role of end users
- Describe dissemination and IPR so it catches the reader and appears to be exciting
- Describe the **IMPACT** – Will this project ever make any difference?
- **The evaluator typically uses 2-3 timer in total for reading and filling out forms**



SPECIFIC ADVICE FOR MSCA PROPOSALS (ITN AND IAPP)

- The main purpose is training of researchers!!!
- **Training** should be very well planned and described
- Clear **commitments** for the receiving institutions (secondments) and from supervisors.
- Good description of **career planning**
- **Only very good proposals are funded.** Do it right the first time! ITN: 8% funded, IAPP: 12% funded.
- Re-submissions are difficult ... but very good and significantly improved resubmissions are funded.

THANK YOU FOR YOUR ATTENTION

Get it funded!

hj@junker-consult.dk

