



Education, Audiovisual and Culture Executive Agency

ERASMUS+

GUIDE FOR EXPERTS

ON

QUALITY ASSESSMENT OF E+ ACTIONS

managed by the Education, Audiovisual and Culture Executive Agency

(v. 1/2019)

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Part I

GENERAL INFORMATION

PART I GENERAL INFORMATION

1. INTRODUCTION

This guide is intended to provide experts with instructions and guidance on how to ensure a high quality standardised assessment of a project application¹ received in response to Calls for Proposals managed by the Education Audiovisual and Culture Executive Agency (the Agency) and advice on providing accreditation.

The Agency manages centralised actions of the E+ Programme in the field of education, training, youth and sport for the period 2014-2020. The remaining – decentralised – actions are managed at a national level through the network of [E+ National Agencies](#). Detailed information on all E+ actions is available on the Agency's [website](#)². Most of these actions provide funding opportunities for projects. The Agency is also in charge of providing accreditation or labels (e.g. Erasmus Charter for Higher Education), which is a pre-requisite for certain organisations to participate in a number of E+ actions.

The evaluation process of grant applications is carried out under the responsibility of an Evaluation Committee and in accordance with an evaluation methodology, which respects the principles established in the Financial Regulation and its implementing rules. The evaluation process aims at ensuring that applications are treated equally, fairly, and objectively and that only applications of the highest quality are selected for funding or obtain accreditation or a label. For assessing the quality of each application the Evaluation Committee may be assisted by external experts with expertise in the field covered by the action.

The Agency appoints an Evaluation Committee for each Call for Proposals. The Evaluation Committee is composed of representatives of the Executive Agency and the European Commission. Experts are not part of this Committee. This Committee puts forward to the Agency's Authorising Officer, a list of applications that are recommended for funding. The final decision on whether to fund an application is taken by the Agency following consultation with the relevant services at the European Commission.

The guide is divided in two parts:

1. **General information** on the role of an expert and the methodology and principles of quality assessments that apply to the majority of actions. Variations from this model may exist and are clearly explained in Annex 1.
2. **Action-specific information and guidelines**, outlined in Annex 1-4 of the guide, containing detailed information on the various actions (i.e. award criteria) and the respective selection and assessment procedures if they differ from the general framework. Annexes are listed separately from the general part, on the [Agency website](#).

The guide refers primarily to the assessment of project applications. However, the guidelines are equally valid for the attribution of accreditation or labels (if not explicitly stated otherwise).

¹ Please note that the terms "proposal" and "application" are used interchangeably in this guide.

² http://eacea.ec.europa.eu/erasmus-plus_en .

2. ROLE AND APPOINTMENT OF EXPERTS

The role of experts is to **assist the Evaluation Committee in assessing the quality of applications** in relation to a call for proposals and the subsequent selection process in the field of education, training, youth and sport.

Quality assessment is an essential part of the selection procedure. A list of grant applications per action, ranked in quality order, is established thereby taking into account the experts' scores. This list, together with the grant proposals, the consolidated assessments and qualitative summaries, then serves as contribution to the work of the Evaluation Committee to determine the applications of highest merit that will be proposed for funding³. The feedback that is sent to applicants at the end of the selection process builds on the opinion of the Evaluation Committee and the experts' assessments (*see section 4 FEEDBACK TO APPLICANTS*).

Experts are **recruited** through an open [call for expression of interest](#)⁴.

Experts are **appointed** by the Authorising Officer Responsible on the basis of their expertise in the specific thematic field(s) related to the E+ programme in which they are asked to assess applications. However, other criteria like language competencies, gender balance, the coverage of nationalities and geographical representation will also be taken into account in the final composition of an expert panel.

For the assessment of project applications, the Agency applies a system of rotation of experts. This rotation makes it mandatory to include in the pool of experts per action and per Call for Proposals at least 25% "new experts" (i.e. experts not having been contracted for the E+ Programme in year N-1, year N-2 and year N-3), and 10% "brand new" experts (i.e. experts who have never been contracted before in the E+ Programme).

This rule will not apply to experts hired for other types of assignments such as monitoring projects, carrying out studies and analyses, editing of documents, or supporting the Agency during public events.

A maximum number of 200 working days per expert for the call of expression of interest in a sliding window of 4 years has to be respected. This threshold concerns all payments made following contracts issued by the Agency.

The management of expert contracts is based on a fully electronic workflow which is further explained in the call mentioned above.

The Agency does not disclose information or contact details on experts in relation with a given application they assess. The Agency however publishes on its website the list of experts who have concluded a contract of more than 15.000€ (see [point 13.6 Ex post transparency of the call for expression of interest](#))⁵.

2.1 Code of conduct

Experts must perform their tasks to the highest professional standards and in accordance with the instructions of the Evaluation Committee. The Evaluation Committee also monitors the

³ The grant award decision is taken by the authorising officer responsible (see Art. 200 (6) Regulation 2018/1046 of 18 July 2018 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 966/2012, O.J. 30 July 2018 L193/1, (<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1046&from=EN>).

⁴ The list resulting from this call for expressions of interest is valid for the duration of the current generation of programmes managed by the Agency, i.e. until 31.12.2020, https://eacea.ec.europa.eu/about-eacea/working-expert/call-for-expressions-interest-n%C2%B0-eacea201301_en. NB: An expert cannot be engaged by the Agency once his/her cumulative total fees previously paid by the Agency has reached a limit of 130.000€.

⁵ https://eacea.ec.europa.eu/about-eacea/working-expert/call-for-expressions-interest-n%C2%B0-eacea201301_en.

quality of the experts' work. They are further bound to a code of conduct as set out in the [call \(section 13.4\)](#) and contract with the Agency. In that respect, experts' attention is drawn to the following aspects:

Conflict of interest

The declaration of a potential conflict of interest is part of the contractual obligations of experts as provided in the Code of Conduct in the expert contract. A conflict of interest is among the reasons justifying the termination of an expert contract.

- Experts must not have a conflict of interest⁶ **at the time of their appointment**. A declaration that no such conflict exists is part of their contract (for information, see template in Annex 2).
- Experts must also inform the Agency (which reports also to the Evaluation Committee concerned) if such a conflict should arise **at any stage during the assessment of applications** they have been allocated.

The Agency carries out checks to verify that experts are not in a situation of conflict of interest. When a potential conflict of interest is reported by the expert or brought to the attention of the Agency/ Evaluation Committee by any means, the Agency/ Evaluation Committee will analyse the circumstances and any objective elements of information at its disposal. If the Agency's Authorising Officer Responsible comes to the conclusion that there is conflict of interest, the expert is either excluded from the assessment of that particular application, or from the entire selection round.

Confidentiality

Experts are bound by confidentiality⁷, as all information relating to the assessment process is *strictly* confidential. They are not allowed to disclose any information about the applications submitted and the results of the assessment and selection to anyone either during or after the selection. During the assessment process, experts are also bound to respect the data protection of individuals⁸. For this purpose the processing of personal data by the expert shall meet the requirements of Regulation (EU) No 2018/1725 and be processed solely for the purposes set out by the Agency⁹.

⁶ "[...] a conflict of interests exists where the impartial and objective exercise of the functions of a financial actor or other person, as referred to in paragraph 1, is compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other direct or indirect personal interest." See Art. 61(3) of Regulation 2018/1046 of 18 July 2018 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 966/2012, O.J. 30 July 2018 L193/1.
(<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1046&from=EN>)

⁷ As provided in the Code of Conduct in the expert contract.

⁸ See Art. 11.2 of the expert contract.

⁹ Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC. O.J. 21 November 2018, L295/39.
(<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1725&from=en>)

2.2 Conditions of remuneration and reimbursement

The framework for the remuneration by the Agency of the services provided by experts and the reimbursement of possible travel cost is laid out in the call for expression of interest¹⁰ (see section 12).

The EACEA expert remuneration policy is based on a unit cost system (work units allocated per task per proposal) depending on the type of activity and the complexity grade defined for each E+ action. It follows corporate practice of the European Commission services as established during the year 2018. A "work unit" equals 45 EUR, 10 work units equal one working day.

In a number of actions experts are asked to assess several project applications per day. This may include the preparation of the corresponding consolidated assessment where applicable (see section 3.1 The assessment process). The exact workload however varies between actions and is subject to the complexity and volume of an application. Experts are informed about their precise workload and payment conditions, including reimbursement of travel and subsistence cost, at the time of engagement. These conditions are clearly stated in the contract signed with the Agency.

3. ASSESSMENT OF APPLICATIONS

The assessment procedure generally consists of the following main steps described in more detail below:

- **briefing of experts;**
- **individual assessments;**
- **consolidated assessments** including quality review;
- **final panel and establishment of a ranked list of grant applications for review and deliberation of the Evaluation Committee;**
- **list of grant applications proposed for funding by the Evaluation Committee for the award decision of the Agency's Authorising Officer Responsible;**
- **feedback to applicants.**

3.1 The assessment process

Expert briefings

In order to ensure high quality of evaluations, the Agency makes certain that experts receive all necessary information and training before they start working. Therefore they generally participate in one or several action-specific briefing sessions depending on their degree of experience:

- to ensure that all **information on the content of the call, the technicalities (tools) and the process** (selection timetable) has been read by the experts and thoroughly understood. For specific guidance on policy priorities, experts may also refer to the documents listed in Annex 3 to this Guide;

¹⁰ Call for expressions of interest EACEA/2013/01 for the establishment of a list of experts to assist the Education, Audiovisual and Culture Executive Agency in the framework of the management of European Union programmes, https://eacea.ec.europa.eu/about-eacea/working-expert/call-for-expressions-interest-n%C2%B0-eacea201301_en.

- to make sure experts are familiar with the **structure and content of the application form** and tools to be used;
- to foster **common understanding** of the award criteria, priorities and objectives of the call for proposal concerned through group discussions;
- to **train and guide experts** on how to conduct their evaluations in compliance with the award criteria set out in the call and on what is expected in terms of comments so that all assessments are carried out in a coherent and consistent way;
- to ensure that all experts adhere to the **principles of confidentiality, impartiality and absence of conflict of interest** in the frame of the evaluation exercise.

General principles of expert briefings

- All information needed to carry out the evaluations is made available well in advance before the briefings preferably through an **Online Expert Community**.¹¹
- **Transparency**: experts must be provided with the same information as applicants and carry out their assessments on that basis.
- **Experienced experts** may take the lead role as facilitators to stimulate and frame discussions during the briefing sessions or on the forums in the Online Expert Community.

The briefing sessions are **interactive** and emphasis is put on practical exercises (i.e. exercise on anonymised mock application). This allows experts to exchange points of view, get answers to their questions and clarify any doubts related to the selection process and methodology. For reasons of efficiency, a full briefing might be given only to new experts, with a reduced briefing highlighting changes to previous years to experienced experts already involved in previous selections.

Location of the briefing sessions

The briefings take place either in Brussels in the premises of EACEA, are organised online, or follow a mixed approach (partly onsite / partly online meetings).

Over the past years the Agency has moved more and more towards **online briefing sessions** as this approach enables **flexibility**:

- Instead of holding a full day briefing onsite, short online sessions can be organised. Spacing the meetings allows experts to study training material bit by bit and have more time for reflection and formulating pertinent questions at the group meeting.
- Experts do not need to stop their regular professional activity to travel to Brussels for several days which makes it easier to combine both engagements. As a result the Agency can engage high quality experts who cannot spend several days in Brussels.

¹¹ Where an Online Expert Community is set up for a selection round it is used as repository of documents and to enhance discussions and common understanding of the work required during the selection. It is mandatory for experts to join the Online Expert Community of their action.

Individual assessments

In the majority of actions, applications are evaluated with the assistance of two external experts¹². Each expert however first works individually and independently, giving scores¹³ and comments for each award criterion in the assessment form and submitting it electronically.

Consolidated assessments

Once both individual assessments have been finalised and submitted electronically, the Agency puts the experts in contact to consolidate their views on the application and produce single agreed scores and comments on each of the award criteria¹⁴. Variations of this model exist for some actions and are explained in detail in Annex 1 if applicable.

Consolidations may take place online or onsite within the premises of the Agency, or partly online and partly in Brussels:

- Each expert is nominated as Expert 1 or Expert 2 for an application. Expert 1 is in charge of drawing up the draft consolidated assessment in terms of scores and comments, based on the two already completed individual assessments. After agreement with Expert 2, (s)he submits the consolidated assessment electronically in the system.
- If the difference between the total score of both individual assessments is more than 30 points an **additional third assessment** of the application is required¹⁵. This would also be the case if:
 - two experts are unable to reach consensus, or to agree on consolidated scores and comments for an application;
 - there are serious discrepancies in comments between two individual assessments.
- When a third assessment is triggered, the experts with the two assessments that are closest in terms of their overall score will undertake the consolidation¹⁶, however the two consolidating experts will have access to the individual assessment of the other expert and are expected to take into account any pertinent observations in the final consolidated comments and score. Consolidation follows the same rules as explained above.

The consolidated assessment is considered the final assessment of a given application. It means that in case of applications for a grant, the consolidated assessment and scores form the basis for the review and deliberations of the Evaluation Committee in view of ranking applications in order of merit on the list of eligible grant applications. In case of applications for accreditation, it determines if the applicant will receive the accreditation or not.

The assessment process could vary for certain actions where applications are assessed by one or three experts, or in 2 steps (e.g. assessment of pre-proposal in the first stage followed by assessment of full application or the assessment of the application in 2 steps). In that case, Annex 1 describes the specific procedure.

¹² In Erasmus Mundus Joint Master Degrees, each application is assessed by three experts.

¹³ At this stage of the evaluation only full points can be used.

¹⁴ At the stage of consolidation, experts may use half points.

¹⁵ This requirement does not apply when both experts have scored the application under the thresholds for acceptance for the action.

¹⁶ In actions where it is standard to perform three individual assessments all three experts usually undertake the consolidation.

Final panel and establishment of grant application lists

Once the consolidation phase is complete, experts may meet, online or onsite in Brussels, for a final panel to discuss and propose a ranking list of project applications in order of merit. Projects that do not reach the threshold for one or more of the award criteria and/or for the overall score¹⁷ (consolidated result), will not be proposed for funding.

Procedure for the ranking of ex-aequo cases

The assessment process may lead to clusters of applications with the same total score: the **ex-aequo cases**. For those ex-aequo cases that fall around the funding line, experts may be asked to assist the Evaluation Committee with ranking them according to agreed criteria.

The final decision on the ranking of ex-aequo applications shall be taken by the Evaluation Committee, taking into account the opinion of the experts. This opinion is usually given by the group of experts who evaluated the individual applications, working as a team. The group discussion shall be facilitated by an Agency and/or Commission staff member.

During the discussion the group should comply with the following procedure:

- Only consolidated assessments are taken into account¹⁸. Each of the ex-aequo applications is briefly presented to the group highlighting:
 - the strengths and weaknesses identified during the evaluation;
 - the priorities/objectives addressed by the application;
 - possible issues linked to the budget (budget corrections or potential insufficient funding in regard to the planned outcomes);
 - Possible imbalance in the level of quality across the different award criteria.
- Experts may pose questions on the applications presented to better understand the results of the evaluations and the nature of the applications.

The discussion shall focus on the relative merits of the applications. The discussion and outcomes are recorded in writing.

3.2 Assessment of award criteria and scoring

Experts assess applications against the award criteria for an action as defined in the E+ Programme Guide / call for proposals and further presented in Annex 1 of this Guide. Generally, applications are assessed against the following four award criteria¹⁹ agreed at E+ programme level:

- **Relevance of the project**
- **Quality of the project design and implementation**
- **Quality of the project team and the cooperation arrangements**
- **Impact and dissemination**

Each of the award criteria is defined through several elements which must be taken into account by experts when analysing an application. These elements form an exhaustive list of

¹⁷ For most of the actions, the minimum threshold per award criteria and overall score are 50% and 60% respectively. There may be actions where there is only a threshold for the overall score.

¹⁸ Individual assessments of ex-aequo projects are not to be considered during the ranking discussions.

¹⁹ Variations from this model are explained in Annex 1.

points to be considered when scoring the criterion. They are intended to guide experts through the evaluation of the criterion in question but they must not be scored individually.

In order to give clear guidance to experts on how individual elements of analysis should be assessed, action-specific information is given in Annex 1 if required.

When assessing applications against award criteria experts assess the extent to which these applications meet the defined criteria. This assessment must be based on information provided by the applicant only. Information relevant to a specific award criterion may appear in different parts of the application and experts take all of it into consideration. Experts must not assume information that is not stated explicitly in the application or search the internet or make use of their personal background knowledge.

An application can receive a maximum total of 100 points. The maximum score for the different criteria ranges between 20 and 40 points. For details on the exact value of a respective action see Annex 1.

In order to ensure quality standards and coherence in approach four ranges of scores and quality levels for applications have been defined.

The table below shows the ranges of scores for the individual quality standards depending on the maximum score of the award criterion. Applications scored weak (< 50 %) in any criterion²⁰ *cannot be funded* (see section 3.4 Thresholds).

Maximum number of points for a criterion	Range of scores			
	Very good	Good	Fair	Weak
40	34-40	28- 33	20- 27	0-19
30	26-30	21-25	15-20	0-14
25	22-25	18-21	13-17	0-12
20	17-20	14-16	10-13	0-9

- **Very good:** the application addresses all relevant aspects of the criterion in question convincingly and successfully. It provides all the information and evidence needed and there are no concerns or areas of weakness.
- **Good:** the application addresses the criterion well, although some small improvements could be made. It gives clear information on all or nearly all of the evidence needed.
- **Fair:** the application broadly addresses the criterion, but there are some weaknesses. It gives some relevant information, but there are several areas where detail is lacking or the information is unclear.
- **Weak:** the application fails to address the criterion or cannot be judged due to missing or incomplete information. It does not address the question asked, or gives very little relevant information.

Experts must provide comments on each award criterion and, in their comments, refer explicitly to the elements of analysis under the relevant criterion. The comments on each award criterion

²⁰ NB: there may be actions applying quality thresholds only on the total score and not per award criterion (e.g. KA3 Policy Experimentation).

have to reflect and justify the given score. They should emphasise the application's strengths and weaknesses.

As regards **budgetary assessment of an application**, please note that there are broadly speaking two main budgetary models for projects:

- a. the budget is based on real costs i.e. the actual costs incurred under the different budget headings.
- b. the budget is based on a simplified grant²¹ i.e. a fixed amount is applied to specific budget headings and / or types of activity or outputs.

Some actions might also propose a mixed model with a budget partly based on real costs, partly on simplified grants. The type of budget model will be specified and fully explained in the Programme Guide / Call for proposals.

As a result, the financial analysis of a project will vary.

In the more complex scenario where the budget is based on real costs, experts may be asked to comment on it under the award criterion **Quality of the project design and implementation**. In particular, they analyse the *coherence of the grant request in relation to the activities and outputs proposed*. In case the application is of sufficient quality to receive a grant but such coherence is missing, experts could, in duly justified cases, suggest to the Evaluation Committee a correction of the grant amount requested. They should then clearly specify the grant items to be corrected and the amount. It is, however, the Agency's Authorising Officer Responsible which ultimately decides on the final grant amount awarded to successful applicants. N.B.: Experts may not suggest a higher grant than the amount requested by the applicant. They may however express concerns that the amount of funding asked for may not guarantee a satisfactory outcome of the project.

Experts must assess all applications in full, regardless of the score given to any of the award criteria. However, where a two-stage assessment procedure is applied, applications not passing the minimum scoring threshold of step 1 shall not be assessed in full and will be excluded from further assessment.

3.3 Assessment forms

Experts carry out their assessment online using the **Online Expert Evaluation Tool (OEET)**. The applications to be assessed as well as the assessment forms are accessible through the OEET. Experts are provided with technical instructions for the use of OEET as part of their briefing.

The standard assessment forms, for individual and consolidated assessments, are provided by the Agency and used for all E+ actions to ensure coherence across the Programme. The template assessment forms are presented in Annex 4a and 4b. Experts examine the issues to be considered under each award criterion, enter their scores for each award criterion and provide comments (see section 3.2 Assessment of award criteria and scoring).

Once the individual assessment is complete, experts validate it in the OEET and confirm that they have no conflict of interest with respect to that particular application.

As part of the quality assessment, experts may be required to provide at consolidation stage a very short summary of the strengths and weaknesses per proposal assessed. Besides they may be asked to provide information on data included in the applications that are collected for

²¹ Flat rate, unit cost, lump sum.

statistical purposes such as priorities, objectives or topics, or they may be asked to confirm that the data stated in the application is correct. Experts may also be asked to confirm that the applications comply with the eligibility criteria set out in the call for proposals, i.e. number of organisations present in the consortium, the type of organisations, etc. Experts will have to register this information in the OEET.

3.4 Thresholds

The assessment and funding of applications is based on two types of thresholds:

Quality thresholds

In general terms, an application submitted to the Agency in the frame of the E+ Programme qualifies for funding if it receives a score of:

- ✓ at least 60 out of 100 points in total and
- ✓ at least 50% of the maximum points for each award criterion (where applicable).

A **small number of actions apply different thresholds** which are then however clearly explained in the Programme Guide /call for proposals and Annex 1.

Funding threshold

The number of applications that can be funded is also dependent on the budget available for an action as stipulated in the Erasmus+ [annual work programme of the Commission \(DG EAC\)²²](#). As explained above, applications are ranked in order of merit and considered for funding until the available budget runs out. If applications of sufficient quality are available, the Agency usually draws up a **reserve list** of applications. These could be considered for funding in the event that:

- one or several applications on the main list can no longer be funded (e.g. in the case that a contract between the Agency and the project consortium fails to be signed);
- additional budget becomes available for the action.

3.5 Quality Assurance

The Agency aims at the highest level of quality at every stage of the evaluation process. Therefore particular emphasis is put on:

Training of experts and communication

The Agency sets up interactive and flexible briefing sessions to make sure that all aspects of the assessment procedure are clearly understood by experts before they start working. Where possible, an Online Expert Community allows on-going dialogue and exchange on thematic, methodological and technical issues among peers and with Agency staff (see section 3.1 Expert briefings).

Quality review

The work of the experts will be closely monitored according to the provisions of the Agency's General Manual of Grant Procedures during the assessment and drafting of assessment reports. Particular attention will be given to new experts who may be paired with experienced experts for guidance, and/or be given fewer proposals to assess. When monitoring the quality and

²² The annual Work programme is available on the Internet page of DG Education, Youth, Sport & Culture, http://ec.europa.eu/dgs/education_culture/more_info/awp/index_en.htm .

timely delivery of individual assessments, particular attention will be paid to identify experts who may be underperforming, or be systematic high/low scorers, detecting the reasons for this, and taking corrective measures where possible.

With the support of Agency staff, the Evaluation Committee will monitor the assessments produced by experts according to pre-established indicators which may include (indicative list):

- addressing closely – and only – the award criteria and any sub-criteria (where applicable) in their evaluations and respecting any character limitations imposed on applicants for the content of their applications,
- coherence of the scoring pattern as compared to the average scores of other experts,
- coherence between comments and scores (according to the scoring system as defined in the call),
- providing strong and weak points in the comments,
- using only information available in the application form and mandatory annexes,
- working according to the pre-defined calendar,
- comments expressed in clear, neutral and respectful language.

The work undertaken to monitor the quality of the experts' work will be reported to the Evaluation Committee. The reporting will be based on a review of progress that will take place at a point where there are sufficient assessments available to monitor the quality and early enough to possibly redress any issues identified.

The Evaluation Committee is informed of cases where an expert may be underperforming. Individual experts performing below standard will be informed about the improvements required to achieve an acceptable standard. If there is no improvement in the work of the expert(s) in question, their work is redistributed and in the worst case their contract is terminated in accordance with the relevant articles of their expert contract and the "Code of conduct for experts".

Editing of consolidated assessments

Some actions appoint experts to proofread the comments of final consolidated assessments. The nature of this task is to perform a *linguistic review* of the text in order to remove spelling and grammatical errors²³.

Collecting experts' feedback

At the end of the evaluation, the Evaluation Committee will seek feedback from the experts concerning the call, the evaluation process, and the experts' recommendations for future calls and evaluations.

3.6 Tools

During the entire assessment process, experts are required to make use of a certain number of IT tools and platforms. In terms of equipment it is sufficient to dispose of a computer with internet connection and a telephone line. At the time of their engagement and in any case before starting the work, experts will receive complete and detailed instructions on the tools they have to use. Specific user guides will be put at their disposal.

Briefing and training of experts

²³ The majority of comments are not written by English native speakers.

Online briefings are held through a web conferencing system which allows setting up virtual meeting rooms for instantaneous discussions and viewing of presentations and documents.

Online Expert Community

The Community is set up through an online platform²⁴ that can be accessed through the internet at any time during the entire selection period.

Assessment of applications

Experts access the applications that have been assigned to them in the Online Expert Evaluation Tool (OEET). They also submit their individual and consolidated assessments in this tool.

The OEET further allows an expert with the role of editor to access the comments of consolidated assessments to proofread them and improve their linguistic quality.

3.7 Possible problems with applications

Applications may be submitted with some weaknesses of administrative or clerical nature. It might also happen that overlaps between several applications are noticed. The Agency's policy in these cases is the following:

Unclear or missing information

In case of incomplete or unclear applications (administrative/clerical errors) the Evaluation Committee/Agency's responsible Authorising Officer may contact the applicant and ask to submit additional information or clarifications provided that this does not substantially change the application nor calls into question the results of the already completed evaluation, or it may decide to assess the application in the form it was submitted.

Double submissions and overlaps

Experts are bound to inform the Agency immediately if they notice that the same or similar text appears in two or more applications submitted under a given selection round, as well as any other indications of possible double submissions and overlaps. The [E+ Programme Guide, Part C](#) clearly states that *identical or very similar applications – submitted by the same applicant or by other partners of the same consortium – will be subject to a specific assessment in order to exclude the risk of double funding and may all be rejected.*

Please note that the experts, in compliance with the confidentiality requirements, are under no circumstances allowed to contact applicants directly.

²⁴ E.g. "EACEA Experts Network" on Yammer.

FEEDBACK TO APPLICANTS

The Agency notifies applicants in writing of the results of their application. Each applicant receives feedback on the application submitted. This feedback is based on the consolidated final assessment and the Evaluation Committee's review and deliberations and is given in English.

After the closure of the selection exercise, and in case of an official appeal by an applicant, experts may be called upon to revisit their evaluation and clarify certain aspects of the application.

GOOD ASSESSMENT PRACTICES

To conclude, this guide presents some general tips for good assessment practice. Experts receive more specific advice linked to the action they are working for at the time of their briefing and during the assessment period.

It is recommended that experts:

- read several applications before assessing a first one of them in full as this allows to benchmark answers in different sections of the applications;
- read the whole application carefully before completing the assessment form;
- working on the same project evaluate the applications in a prescribed order so that both individual assessments are completed at the same time to avoid losing time with the consolidations;
- pay particular attention to clarity, consistency and appropriate level of detail in their comments. The comments must also be balanced, in line with the scoring, objective and polite.
- contact Agency staff immediately if they feel uncertain about any of their assignments or face difficulties which may hamper their work.

Part II

ACTION-SPECIFIC INFORMATION

PART II ACTION- SPECIFIC INFORMATION

- ANNEX 1.a Criteria to assess an application submitted under [NAME OF ACTION]
- ANNEX 1.b Description of the specific selection process and methodology for [NAME OF ACTION] [where applicable]
- ANNEX 2 Declaration of absence of conflict of interests and of confidentiality (for information, the declaration will form an integral part of the contract).
- ANNEX 3 Reference documents on policy priorities
- ANNEX 4.a Individual assessment form template for [NAME OF THE ACTION]
- ANNEX 4.b Consolidated Quality Assessment Form template for [NAME OF THE ACTION]

These annexes containing action-specific information must be read in conjunction with the general part of the guide to gain complete overview of the respective selection procedure.

If presented in a separate document, they can [be downloaded here.](#)