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| **Establishing the European Geological Surveys Research Area to deliver a Geological Service for Europe** |  |  |
| **Technical review report for project \_\_\_\_\_\_\_\_**  |
|  |  | This report is part of a project that has received funding by the European Union’s Horizon 2020 research and innovation programme under grant agreement number 731166. |

**INTRODUCTION**

Technical review report is part of GeoERA’s Monitoring and evaluation process for co-funded projects (*hereinafter: project*). The aim of a technical review is to assess the work carried out under the project over a certain period and provide recommendations. Such technical review evaluates the project reports and deliverables, the proper use of resources, the management of the project and the expected impact.

Technical review report consists of four sections, each representing one level of monitoring and/or evaluation of the project:

|  |  |  |  |
| --- | --- | --- | --- |
| Level | Monitor / Reviewer | Input | Aim |
| 1 – Monitoring of progress indicators | Monitoring and reporting officer (GeoZS) | MPPR\*FPPR\*\* | Monitoring of the effectiveness of implementation of selected projects with respect to finance, time and administration. |
| 2 – Scientific review | Reviewers (GeoZS) | Submitted deliverablesMPPRFPPR | Quality review of the deliverables and review of achieving scientific and professional goals. |
| 3 – Review of the theme progress | Theme coordinators | MPPRFPPR | Review of achieving theme objectives. |
| 4 – GeoERA Progress evaluation | Stakeholder Council member(s) | Sections 1 and 2 of this reportReview meetings  | Overall project progress and general recommendations. |

\*MPPR = Midterm Project Progress Report (see PI doc no 2)

\*\*FPPR = Final Project Progress Report (see PI doc no 2)

Monitoring and evaluation process:

M0 = End of reporting period

M1 = Submitted (Final) Project progress Report (MPPR / FPPR)

M2 = 1 – Monitoring & 2 – Evaluation

M3 = 3 – Evaluation of the theme progress

M3 = (Final) Review Meeting & 4 – Progress evaluation

Each project will be reviewed twice: for first project period M1-M18 – Technical review report, and second project period M19-M36 – Final review report.

Technical review report is based on Horizon 2020 templates but adopted to GeoERA needs. Technical reviews of projects shall be carried out on a confidential basis.

**GENERAL INFORMATION**

|  |  |
| --- | --- |
| ERA-NET Cofund Grant Agreement: | 731166 |
| ERA-NET Cofund acronym: | GeoERA |
| Call identifier: | H2020-LCE-2016-2017/H2020-LCE-2016-ERA |

|  |  |
| --- | --- |
| Project full title: |  |
| Project acronym |  |
| Project reference number: |  |
| Project topic: |  |
| Project specific topic: |  |
| Lead partner: |  |
| Project website: |  |

|  |  |
| --- | --- |
| [ ]  | Technical review report |
| [ ]  | Final review report |

|  |  |
| --- | --- |
| Period covered |  |
| Review meeting date |  |

|  |  |  |
| --- | --- | --- |
| Contributor: | Role: | Signature: |
| Name | Monitoring and reporting officer |  |
| Name | Reviewer |  |
| Name | Theme coordinator |  |
| Name | Stakeholder Council member |  |

# LEVEL 1 – MONITORING OF PROGRESS INDICATORS

In this section the project is monitored ”remotely” on the basis of the respective reports. This part is filled in by Monitoring and reporting officer with aim to monitor the effectiveness of implementation of the selected projects
with respect to finance, time and administration, based on submited MPPR and FPPR.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Yes | Partially (comment needed) | No  |
| **PROJECT MANAGEMENT** |
| Has the MPPR / FPPR report been submitted on time? | [ ]  |  | [ ]  |
| Have there been any changes in project partnership?  | [ ]  |  | [ ]  |
| Has the project management been performed as required? | [ ]  |  | [ ]  |
| Has the collaboration between partners been effective? | [ ]  |  | [ ]  |
| Do you identify evidence of underperforming partners, lack of commitment or change of interest of any partners? | [ ]  (see comment) |  | [ ]  |
| **DELIVERABLES and MILESTONES** |
| Have the planned deliverables for the period been submitted on time according to timeline in Project Agreement? | [ ]  |  | [ ]  |
| Have the planned deliverables for the period been completed (from MPPR / FPPR, sheet 4) | [ ]  |  | [ ]  |
| Have any changes to deliverables occurred (type/ dissemination level)? (from MPPR / FPPR, sheet 4 and 5) | [ ]  |  | [ ]  |
| Have planned milestones been achieved for the reporting period? (from MPPR / FPPR, sheet 4) | [ ]  |  | [ ]  |
| Have the project partnership identify any difficulties achieving any of the deliverables / milestones? | [ ]  |  | [ ]  |
| **DEVIATIONS (from MPPR / FPPR, sheet 5)** |  |  |  |
| Has the project partnership identify any deviations that will not affect projects outputs? | [ ]  |  | [ ]  |
| Have any deviations occur on the project, with impact on project outputs? | [ ]  |  | [ ]  |
| In case of deviations, have the project adopted corrective measures? | [ ]  |  | [ ]  |
| **DISSEMINATION, COMMUNICATION** |
| Has the project adopted its dissemination plan? | [ ]  |  | [ ]  |
| Have the planned dissemination activities been completed for the reporting period? (from MPPR / FPPR, sheet 6) | [ ]  |  | [ ]  |
| Have the partners’ disseminated project results and information adequately? | [ ]  |  | [ ]  |
| Is the project following dissemination plan? | [ ]  |  | [ ]  |
| Is the project interacting in a satisfactory manner with other GeoERA projects? | [ ]  |  | [ ]  |
| Is the project interacting in a satisfactory manner with national/international bodies? | [ ]  |  | [ ]  |

|  |
| --- |
| **FINANCE** |
| To the best of your estimate, have the resources used been utilised for achieving the project? (according to MPPR / FPPR, sheet 9) | [ ]  |  | [ ]  |
| To the best of your estimate, have the resources used been in a manner consisted with the principle of economy, efficiency and effectiveness?\*  | [ ]  |  | [ ]  |
| Are there any major deviations in the budget consumptions from the financial plan? (zero consumption in M18; deviation from plan exceeding 20% in M36) | [ ]  |  | [ ]  |
| Are there any major deviations in the Person - Months consumptions from the plan? (zero consumption in M18; deviation from plan exceeding 20% in M36) | [ ]  |  | [ ]  |
| Are any budget modifications for the project needed? (from MPPR / FPPR, sheet 5) | [ ]  |  | [ ]  |

**\*The principles of economy, efficiency and effectiveness**: refers to the standard of “good housekeeping” in spending public money effectively. Economy can be understood as minimising the costs of resources used for an activity (input), having regard to the appropriate quality and can be linked to efficiency, which is the relationship between the outputs and the resources used to produce them. Effectiveness is concerned with measuring the extent to which the objectives have been achieved and the relationship between the intended impact and the actual impact of an activity. Cost effectiveness means the relationship between project costs and outcomes, expressed as costs per unit of outcome achieved.

Comments (highlighting the project progress) / deviations / recommendations:

**Overall assessment of the project:**

[ ]  5 - **Overachiever** (the project has achieved all objectives and goals for the period and has even exceeded expectations)

[ ]  4 - **Excellent progress** (the project has fully achieved its objectives and goals for the period)

[ ]  3 - **Good progress** (the project has achieved most of its objectives and goals for the period with relatively minor deviations)

[ ]  2 - **Acceptable progress** (the project has achieved some of its objectives; however corrective action will be required)

[ ]  1 - **Unsatisfactory progress** (the project has failed to achieve critical objectives and/or is not at all on schedule)

Summary of dissemination activities (detailed activities are annexed to this report):

|  |  |  |
| --- | --- | --- |
| Activity | Target audience | Number of people reached |
|  |  |  |
|  |  |  |

Are the dissemination activities adequate? (link to GeoERA WP5)

[ ]  5 - **Overachieved** (the projects dissemination activities have exceeded expectations)

[ ]  4 - **Excellent** (the projects dissemination activities have fully achieved its expectations)

[ ]  3 - **Good** (the projects dissemination activities are adequate; however some additional activities are needed)

[ ]  2 - **Acceptable** (the projects dissemination activities need corrective actions; additional activities are needed)

[ ]  1 - **Unsatisfactory** (the project has failed to disseminate)

Cummulative financial statement:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Person months | Total eligible costs | Reimbursement rate | GeoERA contribution | In-kind contribution |
| Plan |  |  |  |  |  |
| 1st period consumption |  |  |  |  |  |
| 2nd period consumtion |  |  |  |  |  |
|  |  | Payments made |  |  |
|  |  | To be reimbursed |  |  |

# LEVEL 2 – SCIENTIFIC REVIEW

In this section the project is reviewed ”remotely” on the basis of the respective reports. This part is filled in by reviewer with aim to review the quality of the deliverables and review of achieving scientific and professional goals. Scientific review is based on submitted deliverables and reported Impact statement in MPPR/FPPR.

Impact statement (from MPPR / FPPR, sheet 8):

Expected impact (from Project Agreement):

Evaluation of deliverables

|  |
| --- |
| Deliverables list status |
| No. | Title | Status (Approve/ Reject) | Comments |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Has the quality as a whole been achieved according the objectives? Has the project as a whole been making satisfactory progress?

[ ]  5 - **Overachiever** (the project has achieved all objectives and goals for the period and has even exceeded expectations)

[ ]  4 - **Excellent progress** (the project has fully achieved its objectives and goals for the period)

[ ]  3 - **Good progress** (the project has achieved most of its objectives and goals for the period with relatively minor deviations)

[ ]  2 - **Acceptable progress** (the project has achieved some of its objectives; however corrective action will be required)

[ ]  1 - **Unsatisfactory progress** (the project has failed to achieve critical objectives and/or is not at all on schedule)

Comments (highlighting the project progress) / deviations / recommendations:

# LEVEL 3 – Review of the theme progress

In this section the project is reviewed ”remotely” on the basis of the respective reports. This part is filled in by Theme coordinator with aim to review the achieved scientific goals in accordance with theme objectives, on the basis of Sheet 3 in MPPR / FPPR – Project contribution to GeoERA project.

Project contribution to GeoERA project (from MPPR / FPPR, sheet 3):

Free text

Contribution to GeoERA overall objectives and the objectives of the Theme Topics

Theme objectives:

Has the project as a whole achieved the objectives and expected impact of the theme?

[ ]  5 - **Overachiever** (the project has achieved greater impact on project theme and/or other themes than expected)

[ ]  4 - **Excellent progress** (the project has fully achieved its objectives and goals towards the theme as expected)

[ ]  3 - **Good progress** (the project has achieved most of its impact towards the theme for the period with relatively minor deviations)

[ ]  2 - **Acceptable progress** (the project has minor impact; corrective action will be required)

[ ]  1 - **Unsatisfactory progress** (the project has failed to achieve critical objectives and/or is not at all on schedule and/or has no impact on the theme; corrective actions are required)

Comments / deviations / recommendations:

# LEVEL 4 – GeoERA progress evaluation

In this section the project is reviewed on the Review meetings, where projects present their overall progress and achievements. This section relates to particular project, broader impact of GeoERA as a whole on policies will be covered at the Final Review meeting with questionnaire and interview with Evaluator.

Based on technical review summaries provided by Sections 1 – 3 of this report, and project presentation on the (Final) Review meeting:

Has the project as a whole been making satisfactory progress according to your own understanding and expectations of the GeoERA project?

[ ]  5 - **Overachiever** (the project has exceeded expectations)

[ ]  4 - **Excellent progress** (as expected)

[ ]  3 - **Good progress** (minor recommendations given below)

[ ]  2 - **Acceptable progress** (below expectations; minor corrective action will be required)

[ ]  1 - **Unsatisfactory progress** (the project has failed; corrective actions are required)

Overall comments for the project (overall recommendations, modifications, corrective actions, or re-tuning the objectives to optimize the impact or keep up with the State of the Art, re-focusing; or a simple praise)

Annex 1:

Review meeting list of participants

Project Acronym:

Review meeting date:

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Function | Beneficiary | Contact details (email and phone) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |