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Update on the ESF MOF on Evaluation

Update on the ESF MO Forum on Evaluation / Anke Reinhardt
Bern, 7. November 2011

Structure

1. What are the Aims and Activities of the Forum?
2. Where are we now?
3. How do we interact with the other Fora?



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1. General Aims and Objectives of the Forum

▶ Aims

- To improve evaluation studies on funding schemes
- To learn about best practices of impact assessment of research and research funding
- To identify the challenges in conducting transnational comparative evaluation

▶ Objectives

- To facilitate networking
- To exchange and share information on evaluation studies of funding schemes and practices
- To produce an inventory of current and past impact evaluation practices/methodologies across Member Organisations, identifying gaps and lessons learned
- To develop an analysis of research portfolios and research output

▶ Strategic Alignment

- With Action 6 of the [EUROHORCs and ESF Vision on a Globally Competitive ERA and their Road Map for Actions](#)

1. Fields of activities of the Working Groups

▶ WG 1. Evaluation Guidelines

- Draw up guidelines for ex-post evaluation of funding schemes
- Do a survey among the members on evaluation organisation and practices
- Develop a website repository containing evaluation reports and guidelines

▶ WG 2. Impact assessment on Science and Society

- Discuss the advantages and shortcomings with different methods for impact assessment
- Try to identify good practices in order to avoid pitfalls
- Conduct an in-depth analysis of impact studies

▶ WG 3. Classification systems and Categorisation of output data

- Examine feasibility of common systems to classify research portfolios
- Produce a short paper summarising approaches for the analysis of output data

1. Expected Outcome

▶ WG 1:

- Website repository of evaluation studies
- Recommendations on Ex-post Evaluations
- Report with Results of Mapping Exercise on evaluation practices/the evaluation function within the Member Organisations

▶ WG 2:

- report with in depth-analysis of practices of impact assessment

▶ WG 3:

- short paper on the classification of research portfolios
- short paper summarising approaches for the analysis of output data
- recommended approaches, “core” set of outputs + guidance on definitions
- potential for pilot exercise

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2. Timeline

- ▶ First Meeting in Stockholm May 2010
 - ▶ Second Meeting in Smolenice November 2010
 - ▶ Third Meeting in Paris in May 2011
 - ▶ Fourth Meeting in Bern in November 2011
 - ▶ Fifth Meeting in Spring 2012
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- ▶ Meetings of Working Groups in between, if required
 - ▶ WG 3 has met twice in London (December 2010, and October 2011)
 - ▶ Support by Sarah Chen from April-August 2011
 - ▶ Extension of the Forum until December 2012, granted by the Governing Council in July.

2. Activities of the Working Groups since last meeting

▶ WG 1:

- Draft report on results of survey about evaluation practices among MOs
- draft of a process model of evaluation studies
- draft of „10 commandments“ on how to conduct evaluation studies

▶ WG 2:

- in-depth analysis of relevant Impact Studies

▶ WG 3:

- Meeting on collection of output data (October 2011)
- Survey on approaches used to collect output data among MOs and others
- publication of the EMRC special policy briefing on research classification approaches scheduled for November 22nd 2011
- Discussion of Pilot Studies using output data

2. Timeline of future activities

- ▶ **Fourth Meeting in Bern 2011:**
 - discussion of drafts of the WGs,
 - ideas on dissemination of Forum activities and outputs,
 - ideas about the future of the Forum
 - winter: revision of the draft reports
 - draft of „overarching“ chapter

- ▶ **Fifth Meeting in Spring 2012:**
 - discussion of final report(s) with the whole Forum
 - decision on of marketing/dissemination activities

- ▶ **Spring until end of 2012:**
 - final layout of the report(s)
 - implementation of dissemination and marketing activities

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3. Outreach Activities/ Interaction with other MO Fora

▶ „The Public's Right to know“; Article in Research Europe (26.5.2011)

▶ Other Fora:

Research Careers

- Evaluation Forum is invited to present its work on next Workshop.
- plans a Workshop on Career Tracking in February 2012.
- participation of our MO Forum very welcome.



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Thank you for your attention!