

Proposals Management System

INTRODUCTION

The Proposals Management System is a web-based platform designed with the aim to help committees assigned the assessment of Grants Applications submitted under an open or a restricted Call for Proposals.

The system can be used by the evaluation committee (the chairperson and the secretary) and the Assessors (of concept notes and full proposals) to make faster the process of evaluation and submission of evaluation grids. Assessors can fill in the evaluation grids online and save copies of these grids on their local devices, while the chairperson can assign assessors and make decisions based on the scores submitted, and get immediate reports showing the progress of the evaluation process and its results.

While it does not replace the paper-based process that is still required by the rules, the system supports this process by making use of web technologies and provides an organised archive where electronic copies of proposals and paper signed grids are secured.

The system covers the phases of evaluation and contracting and can be deployed with a Grants Management and Monitoring module (EGREG) to cover the phase of grants actions implementation. It can be customised according to the specific needs of the programme.

ASSESSMENT OF CONCEPT NOTES

Submitted applications are inserted into the system database after being classified according to the result of the administrative check (administratively compliant or non-compliant).

For each application a record for key information is inserted (like: Name of the applicant, co-applicants, affiliated entities, Title of the action, Duration, Total project costs & Requested contribution) and an electronic copy of the application is uploaded to the system files repository. See figure (1).

The chairperson assigns 2 assessors for each administratively compliant concept note. Based on the scores given by assessors, the chairperson may decide to select a third assessor or makes a final decision either to select the application for full proposal evaluation (the next phase in the evaluation process) or to reject it.

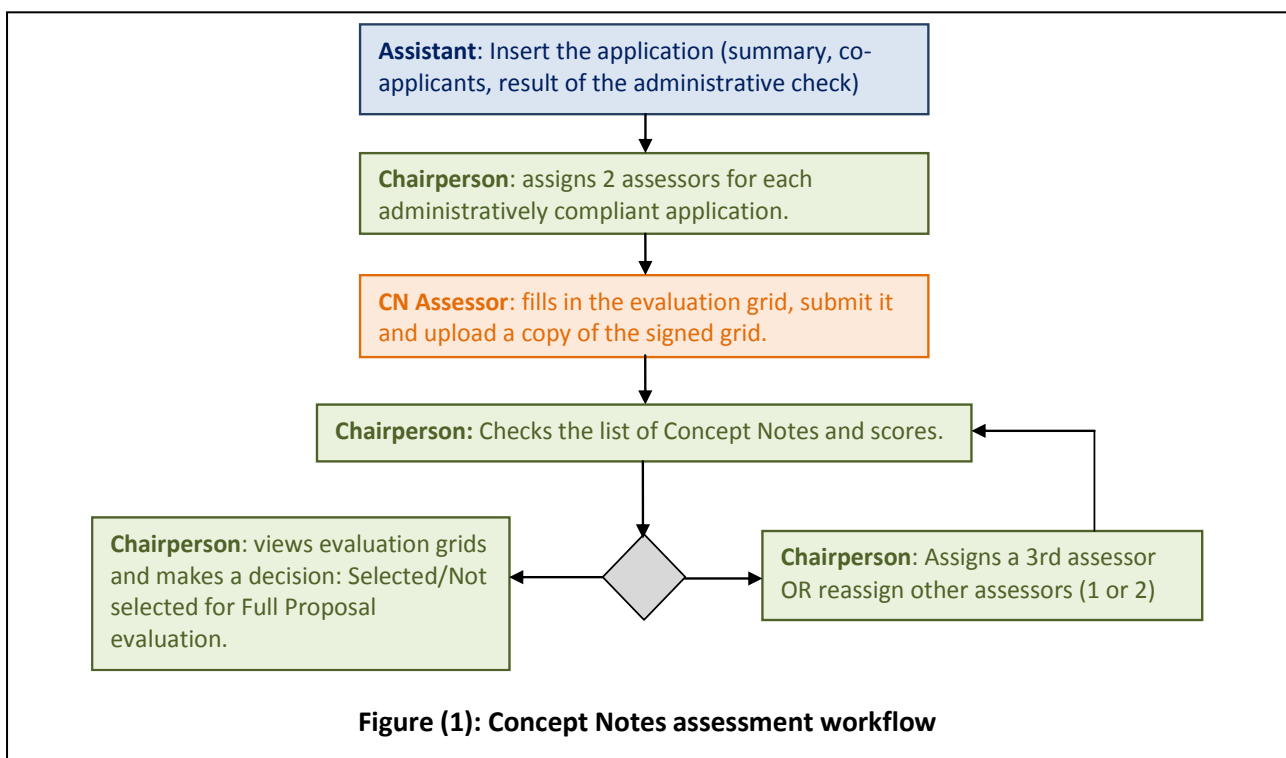
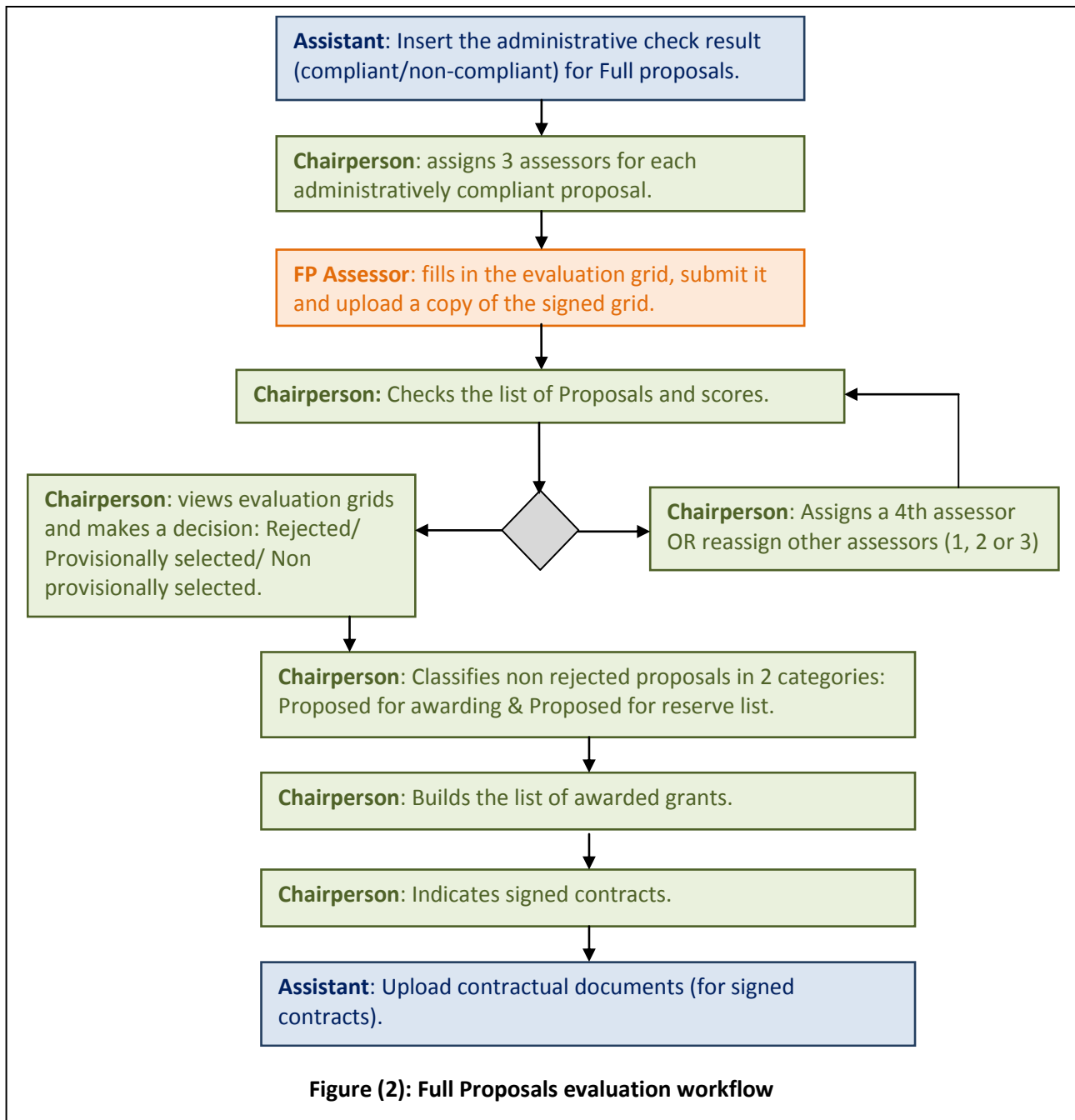


Figure (1): Concept Notes assessment workflow

EVALUATION OF FULL PROPOSALS

Figure (2) illustrates the main workflow for the evaluation of full proposals. Based on the results of the first step (assessment of concept notes), applications selected for full proposal evaluation are listed in the Assistant account who sets the result of the administrative check (Compliant or Non-compliant).

The chairperson assigns 3 assessors for each administratively compliant proposal. Based on the scores given by assessors, the chairperson may decide to select a fourth assessor or makes a decision by adding the proposal to one of the following lists: Provisionally Selected, Non Provisionally Selected or Rejected.



In a next step, the chairperson builds two lists of proposals: Proposed for awarding and Proposed for reserve list. Later on, and based on the guidelines, the chairperson builds the list of awarded grants, and whenever a grant contract is signed, the contract reference number and the date of signature are registered into the system.

FUNCTIONS AND FEATURES

The workflows described above illustrate the overall approach adopted by the system; however a set of complementary functions are made available for each category of users:

1. The Assistant (or the evaluation committee secretary) is responsible for creating the accounts for the assessors, as well as for uploading any contractual documents (e.g. a scanned copy of the contract) once a grant contract is signed by the Contracting Authority.
2. The Assessor can export the concept note or the full proposal evaluation grid to an MS-Excel file to be formatted, printed and signed for hard copy submission. An electronic copy of the signed evaluation grid can also be uploaded to the system file repository.
3. The Chairperson can export the results of each phase to an external Excel file that can be manipulated and used independently from the system (for example, to submit a report summarising the results). In addition, (s)he can set the number and titles of schemes and calls and the thresholds for the evaluation grid sections.

Added to these functions, the system provides search capabilities and automatic validation procedures to avoid duplicate data entry and any violation of guidelines. For example, if an entity is already registered while inserting an application, the relevant information are not requested if the same entity plays a role in another application.

The system can be installed with the Grants Management and Monitoring module (EGREG), so all data entered during the phase of proposals evaluation is transferred automatically to EGREG database.

CUSTOMISATIONS

The Proposals Management System can be customised to fulfill the requirements of each specific programme and its related guidelines and to respond also to the needs of the Contracting Authority. Customisations include:

- ✓ Adapt the system for restricted procedures (for both steps or for one of the 2 steps).
- ✓ Modify the minimum and maximum numbers of assessors (for concept notes and/or full applications).
- ✓ Modify the evaluation grids according to the guidelines requirements.
- ✓ Adapt the system to enforce respecting the conditions set in the specific guidelines (like: number of applications per applicant, number of awarded grants per applicant and per scheme, minimum and maximum duration of projects, minimum and maximum contribution requested...etc.)
- ✓ Build statistical reports based on the requirements of the Contracting Authority.
- ✓ Change the contents and style of home page and the terminology used.