

## Meeting Minutes

<b>Meeting Topic:</b>	“SPECIFIC REPORTS produced by ROM contractors in the period 2005-2011”
<b>Location:</b>	DG DEVCO, J54, 2/186
<b>Date/Time:</b>	07 March 2012, 14.30 – 18.00
<b>Attendance:</b>	Commission, ROM contractors, SQ2M team (21 participants in total) – see <i>attached attendance list (Annex I)</i>
<b>Chair:</b>	Jan Ten Bloemendal, DEVCO Head of Unit B1
<b>Agenda:</b>	See attached (Annex II)

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### Summary:

The SQ2M project had prepared an analysis of *ROM Specific Reports (SR)*. The purpose of this meeting was to present the study, to learn more about Specific Reports carried out by ROM contractors and to discuss the value added and possible improvement of ROM SR in the future.

Ruth Kaeppler, SQ2M STE, presented the findings of the study *SPECIFIC REPORTS produced by ROM contractors in the period 2005-2011*. This was followed by presentations of Specific reports produced and/or planned, by ROM contractors for Latin America, CMTP, ACP and Asia.

The two workshops as foreseen (methodological aspects and users of ROM SR) did not take place. The preliminary recommendations drafted of the *ROM Special Reports (SR) Study* were discussed and then the subsequent discussions focused on different aspects of ROM (role, challenges, weaknesses and added value).

### Discussion/Conclusions:

1. The discussion **confirmed the preliminary recommendations** of the *ROM Special Reports (SR) Study* that:
  - a. The preparation of ROM SR (especially thematic SR), if considered by Geo/thematic units as necessary, should be planned on an annual basis (in order to select the projects to be monitored, ensure availability of relevant experts with sound technical background, etc.)
  - b. ROM SR should follow a standardised format (e.g. regarding template, sampling method, coverage)

- c. The full potential of ROM data could be more exploited through more sophisticated applications and studies. ROM SR should be more systematically distributed and followed up (e.g. for lessons learnt)
2. As a key issue for quality of ROM SR, the challenge of **sampling** was highlighted. There is a challenge to make a ROM SR representative when a ROM portfolio is presented “un-weighted”, for example, the scores of a project with a budget of EUR 500k was counted equally to a project with a budget of EUR 50 Million.
3. It was mostly agreed by participants that ROM **SR can add value and represent trends of the quality of a portfolio** in an overview format.
4. In the context of the above, the difference between **thematic** and **country SR** was discussed, and how or to what extent these could be coordinated/combined in order to be able to gather more relevant findings/lessons/conclusions. One suggestion here was to plan/coordinate SR of various lots together in order to achieve consistency of methodology and thus allow for easier comparison of results across countries and/or regions.
5. There was a reflection on whether it is better to have a **quick ROM** every year (the value to repeat ROMs was especially highlighted by contractors), or whether it would be better to have **more in depth ROM** every two years (an option well considered by the EC). Related to this it was mentioned that if ROM is undertaken every two years only, most projects would be subject to a single ROM exercise only. In depth ROM would be similar to a mid-term evaluation. The benefits of repeat monitoring (possibility to observe development of performance of a project during time) would be lost.
6. There was a reflection on **the role of ROM**. Also, it was considered that a ROM mission tends to bring all stakeholders together and tends to focus task manager away from day-to-day management and towards reflection of DAC criteria and results. - However, it was highlighted in this context that the **independence of ROM** was a key factor for the instrument’s success. Related to this it was suggested that ROM needs to be a **system**, for example, regarding the **automatic selection** of a ROM project portfolio, rather than a EUD decision to monitor, or not, a certain project).
7. ROM is really part of an overall **EU M&E system**. So, the effectiveness of ROM also hinges on the functioning and integration of all these elements. For example, a functioning and standardised **internal monitoring system** (by TMs) would add significant value to ROM effectiveness. This point has been discussed, keeping in mind that IM and ROM have two different meanings.
8. It was concluded that some **key strength** of ROM Special reports (complementing/adding to the findings of the ROM SR study) included:

- a. Provision of a concise overview of ROM activities (e.g. for newcomers), e.g. reducing ROM information from 170 pages to 23.
  - b. ROM SR can complement other EU M&E tools and inform, for example, evaluations.
9. **Challenges** that were highlighted, included:
- a. The aggregation of ROM data along basic scores tends to produce too general conclusions. One would have to consider BCS in more details to produce more meaningful SR.
  - b. Often the set ROM schedule (time/resources) is too tight to allow for more meaningful investigations. The quality/value added of ROM SR depends very much on the quality of underlying ROM reports of individual projects.

**Follow up:**

- Unit B1 will take the discussion into account regarding the ongoing internal reflection on ROM.
- Further discussion between unit B1 and the ROM Contractors and TM's is likely to be scheduled in future.

## ANNEX I

**Attendance List:** Presentation ROM Special Reports Study,  
7 March 2012, J54 2/186, 14.30-18.00

	Name	Organisation
1	Jan Ten Bloemendal	COM HoU DEVCO B1
2	Thierry Dudermel	COM HoS DEVCO B1
3	Nicolas Leroy	COM DEVCO B1
4	Daniel Clauss	COM DEVCO B1
5	Charles Raudot de Châtenay	COM DEVCO B2
6	Pierfranco Alloa	COM DEVCO D2
7	Frans Geilfus	ROM ACP, Eptisa
8	Marian Murawa	ROM ENPI, IBM
9	Serge Bertran	ROM ENPI, IBM
10	Karen McHugh	ROM ASIA, Ecorys
11	Cecile Delhez	ROM A SIA, Ecorys
12	Veronika Tywuschik	ROM WBT, Particip
13	Irene Salvi	ROM WBT, Particip
14	Fabrizio Mencarelli	ROM LA, Eptisa
15	Juan Manuel Santome	ROM LA, Eptisa
16	Alex Frenz	ROM Turkey, Integration
17	Konstantinos Missirlis	ROM CMTP, ICCS-NTUA
18	Alecos Klemenis	ROM CMTP, ICCS-NTUA
19	Justyna Bielat	ROM CMTP, ICCS-NTUA
20	Véronique Léna	SQ2M, GfA
21	Lucile Petitpierre	SQ2M,GfA
22	Florian Hauser	SQ2M, GfA

## ANNEX II – Meeting AGENDA

### **SPECIFIC REPORTS produced by ROM contractors in the period 2005 to 2011**

Introduction by JanTen-Bloemendal, head of Unit B1, DEVCO

1. **Typology of Specific Reports** (scope, method, main aims, use): Key findings and main observations, Ms Ruth Kaeppler, Senior expert.
2. **Presentation of key examples:**
  - Thematic Specific Report (Social Cohesion), Latin America
  - The role of special reports on ROM findings for the Centrally Managed Thematic projects (aggregation of case studies), CMTP
  - ROM findings in ACP: aggregation of results (exploration of a method for a foreseen study), ACP
  - Analysis of ROM outputs towards MDG's, Asia

### **3. Proposed guiding questions for the workshops (2 groups – Max 1 hour)**

#### **A. Methodology**

- Representativity a major issue? How to use statistics? Sampling method? Aggregation of results?
- Correlation of certain factors in BCS at one level with certain results at other level (p.ex. all projects which are not in line with government policies face problems in sustainability or similar)
- Up to now SR were mainly prepared using rather simple methodologies (excel). Is there a need for applying more sophisticated methodologies (use of statisticians)?
- Needs for standardization of method across sectors, regions, contractors in order to homogenise methods and draw further lessons learnt?

#### **B. Use and added value**

- How to ensure that SR are demand driven, client owned?
- What additional information can be drawn from SR – what may be its use and for whom? Examples: coordination, performance per sector, performance per implementation channel, performance per TA provider, etc)
- ROM is the “small brother” of evaluation. Wouldn't it been appropriate to associate the evaluation unit to the planning of SRs, and make systematically SRs available for the evaluation unit.