



ERDF Summative Assessment Report Summary (ESIF-Form-1-014)

Is this an interim report summary?	
If yes, expected date of final report	

Please provide 3 months before submitting your last claim. Do not include any tables in this worksheet: use tables in following worksheets instead.

Project Name:				Project Ref:	
Lead LEP Area:				Priority Axis:	
Grant Recipient:					
Original Project Total (£)		Original ERDF value (£)		Intervention Rate	#DIV/0!
Current Project Total (£)		Current ERDF Total (£)		Intervention Rate	#DIV/0!
Start date		Financial Completion Date		Practical Completion Date	

1. Project context

Please add a short paragraph for each of the following:

- What was the project seeking to do?
- What was the economic and policy context at the time that the project was designed?
- What were the specific market failures that the project was seeking to address? Was there a strong rationale for the project?
- Was it appropriately designed to achieve its objectives? Was the delivery model appropriate?
- Were the targets set for the project realistic and achievable?
- How did the context change as the project was delivered and did this exert any particular pressures on project delivery?
- Bearing in mind any changes in context or weaknesses in the project design / logic model, can the project reasonably be expected to perform well against its targets?

Insert comments in box below (max. 500 words)

2. Project progress

Please add a short paragraph for each of the following:

- Has the project delivered what it expected to in terms of spend and outputs?
- What are the factors which explain this performance?
- When the project draws to a close, is it expected to have achieved what it set out to?
- As the Summative Assessment may be conducted prior to the completion of the project, it would be appropriate in these instances to forecast the expected lifetime outturn for the project and the assumptions which underpin the analysis.

Insert Comments in box below (max 500 words)

3. Project delivery and management

Please add a short paragraph for each of the following:

- Was the project well managed? Were the right governance and management structures in place and did they operate in the way they were expected to?
- Has the project delivered its intended activities to a high standard?
- Could the delivery of the project have been improved in any way?
- For projects with direct beneficiaries: did the project engage with and select the right beneficiaries? Were the right procedures and criteria in place to ensure the project focused on the right beneficiaries?
- How are project activities perceived by stakeholders and beneficiaries? What are their perceptions of the quality of activities / delivery?
- To what extent have the horizontal principles been integrated into and shaped delivery?

Insert comments in box below (max. 500 words)

4. Project outcomes and impact

Please add a short paragraph for each of the following:

- *What progress has the project made towards achieving the outcome and impacts set out in its logic model?*
- *To what extent are the changes in relevant impact and outcome indicators attributable to project activities?*
- *What are the gross and net additional economic, social and environmental benefits of the project (where relevant and applicable to project activities)?*
- *Can these benefits be quantified and attributed to the project in a statistically robust way?*
- *To what extent has / will the project contribute to the achievement of ERDF programme result indicators?*
- *What are the main sources of Strategic Added Value that the project has created?*

Insert comments in box below (max. 500 words)

5. Project value for money

Please provide a brief analysis of the value for money that the project has provided and, where possible, benchmarks against other similar interventions.

Insert comments in box below (max. 500 words)

6. Conclusions and lessons learnt

Please provide a brief description of the strengths and weaknesses of the project

Please use quantitative data to illustrate your conclusions (e.g. achievement of financials and outputs, of outcomes and impacts etc.) and complete 'Spend and outputs performance' and 'Gross and Net impact' in the the next two worksheets.

Insert comments in box below (max. 500 words)

Insert comments on specific lessons for the following audience (max 250 words per box):

Grant Recipient/ project delivery body

Those designing and implementing similar interventions

Policy makers

Other: please specify

Insert any other comments in box below (max 500 words)