



VEPR Pilot Review Report

Barbara Schmidt

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<p>Reviewer details Lead Reviewer <i>Full name:</i> Riitta Oksanen <i>Email contact:</i> ri.oksanen@kolumbus.fi Second reviewer <i>Full name:</i> Markus Palenberg <i>Email contact:</i> markus@devstrat.org</p>		
<p>Review details <i>Date/s of review meetings:</i> 4 May 2017 <i>Medium of review meeting/s:</i> Skype</p>		
<p>Review focus areas (summarised in 25 words maximum)</p> <ol style="list-style-type: none"> Stakeholder relations and engagement – ensuring evaluations are successful, relevant and useful in the institutional setting. Capacity to craft relevant and useful evaluation questions 		
Capabilities explored	Learning by reviewee (total 750 words)	Reviewer comments on reviewee learning (total 500 words)
<p>1. 1.23 <i>‘Knows how to engage constructively with all stakeholders’.</i></p>	<ul style="list-style-type: none"> This review area was fascinating and gave rise to very rich exchanges with the reviewers, who provided very thought-provoking (and challenging!) feedback already on my initial application form, and on the portfolio during the review discussions. These provided many valuable insights, and opportunity to also learn from the reviewers’ respective experiences in their respective (organisational) settings in which evaluations are taking place. The discussion of phases during which stakeholder ‘consultations’ take place and how made me aware of the opportunities that exist to extend the current practices even further (for example, to involve project staff already in the earliest phase of pre-identification of possible evaluands; as well as reflecting further on the ‘boundaries’ between when evaluations end (should there even be recommendations?) and when the ‘management response’ starts (development of an action plan), 	<p>RO: Barbara identifies the importance of thinking about the quality of evaluation by focusing “beyond evaluation”. She has developed approaches to engaging with stakeholders at early stages of the process, and similarly is developing thinking on how to support follow-up after the evaluation report is ready. Starting to look at evaluation from the point of view of non-evaluators may provide keys to utilisation of evaluations information and strengthening a stronger culture of evaluation. Barbara responds to reviewers suggestions but at the same time has strong capacity to develop ideas further thinking about their application in her operating environment.</p> <p>MAP: Clearly, Barbara had self-reflected on and much developed her skills and abilities in this area throughout her professional career. In her detailed, analytical and</p>

	<p>and where and what my respective role can be (e.g. changing hats between ‘evaluator’ and ‘advocate’), including the tensions and trade-offs that involves.</p> <ul style="list-style-type: none"> • We had a fascinating exchange on what personal skills and capacities are needed by me to manage and engage with stakeholders even more effectively – especially in situations where there is resistance / hostility against an evaluation. Interesting suggestions I would actively consider included digging deeper into the ‘facilitation tool box’ (which I’m already using and developing as priority) and learning more about using influencing and applied psychology concepts (mental mapping, rhetorical / speaking skills) (perhaps NLP?); creating positive / receptive environments, but also ‘pushing through’ evaluations in less positive environments (adult-to-adult assertive communication); including mastering conflict management. • Other useful reviewer suggestions included to look for other alliances in creating more positive evaluation culture / environment, rather than shouldering too much responsibility. Natural partners exist in the organisation and can be leveraged more (e.g. HR); as well as continuing to use external peer networks (EU agencies network on performance development; EES etc). 	<p>open style Barbara presented and analysed past successes and challenges with true stakeholder participation during the evaluation process. Her preparation and our discussions visibly started several self-reflection and learning processes, for example:</p> <ul style="list-style-type: none"> • Procedures and personal skills to allow for more demand-driven evaluations (see below), including acceptance of limitations to what can be done to “convince” stakeholders to buy into a pre-designed evaluation • Drawing a red line for attempts to include stakeholders and be ready to, if must, to conduct successful evaluations also without support by some stakeholders • Mapping key stakeholders along personality profiles, e.g. learning how to efficiently draw conclusions from mini-Myers Briggs checks • Related to the above, learning&training to manage conflicts in a non-emotional, objective fashion (“adult” communication) • Building alliances for evaluations, i.e. identifying and involving influencers
<p>2. 1.22. <i>‘Displays a capacity to identify relevant evaluation questions’</i></p>	<ul style="list-style-type: none"> • Through the review process and discussion with the reviewers I realised the difference between a ‘top-down’ approach to developing evaluation questions (deductive approach, derived from evaluation criteria) and a more ‘bottom-up’ (inductive) approach, and that I could make more conscious and deliberate choices about when to take which approach. The review encouraged me to more ‘boldly’ go for more inductive, ‘issue-driven’ approaches more often / more directly. Whilst I have already adopted such approaches focusing on ‘the real questions’ stakeholders have, this review has 	<p>RO: Barbara identifies the importance of the “real questions” people have for evaluations. She has developed thinking on how to facilitate linking these with the evaluation criteria to give structure to the processes. She is starting to recognize a role for evaluation that goes beyond compliance to evaluation norms and standards and is based on facilitation based on evaluation norms and standards. Barbara’s ideas on how she can strengthen her skills and capabilities provide an excellent basis for further professional development not</p>

	<p>encouraged me to regard this is a legitimate and in fact even (more) desirable approach, which can also help to increase stakeholder involvement and evaluation use and usefulness.</p> <ul style="list-style-type: none"> • Concrete ways of strengthening my skills and capabilities were also discussed, and I think the following ways would be useful and feasible for me to take my (self-) learning in this area further: • The idea of using ‘staff training’ as a learning and development opportunity is excellent, and should be quite feasible; by building on further on recent opportunity of staff briefings about the currently ongoing ‘external cross-agencies evaluation’ Eurofound and 3 other agencies are currently undergoing (I prepared the presentation and participated in FAQ sessions organised for staff to discuss evaluation topics further with any staff members interested) – this raised the recognition of evaluation being important and worth knowing more about amongst staff. Therefore offering a series of (very) short ‘training’ modules on evaluation topics for general Eurofound staff could be an excellent way to introduce staff to relevant evaluation topics (for example – ‘Are we making an impact with our activity/project?’ – how can we prepare for the next evaluation?’ (snappy topics/titles that attract staff to attend to learn and critically discuss.). Can be done in conjunction / aligned with other colleagues – for example, HR Learning&Development function; also the Communication section has already piloted similar series of short topical training sessions on communication topics which have proven very popular (1 just one hour at a time) –that format could be easily adopted also for evaluation topics. • Using the opportunity of the EU agencies’ ‘PDN’ network for joint workshops, to organise ‘peer learning’ amongst fellow evaluation officers in agencies. There could also be the 	<p>only for her but her entire organisation.</p> <p>MAP: Having spent much of her professional career in an institution with a strong policy and criteria-driven top-down approach to evaluation question development, Barbara demonstrated interest, self-reflection that is likely to trigger further learning in how demand-driven evaluation question could be designed and implemented: Building on her earlier experiences, one approach was to “translate” evaluation questions important to project/program management into “criteria-driven” questions, and work with these two associated sets in parallel. More drastically, Barbara also became interested in ways to influence evaluation policy itself, necessitating influencing skills towards the organizations top management and governance bodies.</p> <p>Apart from this, Barbara also showed interest and self-reflection about how to make evaluation questions more meaningful by avoiding ambiguous language. A simple tool she is likely to use in future is to simply imagine the spectrum of possible answers and to adjust evaluation question wording until the “wobble room” for coming up with non-relevant answers is minimized. Also, testing draft evaluation questions against EQ quality guides was considered helpful by Barbara and may be pursued.</p>
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	<p>opportunity to use some capacity of a new multiannual evaluation services framework contract we are sharing amongst 8 EU Agencies – I can drive this to an extent as ‘lead agency’ contract manager – possibly for later this year or early next year (to be explored with other agencies and contractor at start of contract).</p> <ul style="list-style-type: none"> • Other self-learning actions: the suggestion to ‘test’ evaluation questions (for next upcoming evaluation) by trying to answer them very early in process (without much research) – to check if that is the real question that needs to be answered, or modify it. 	
<p>3. (3.4. ‘self-awareness and pursuit of continuous professional development’)</p>	<ul style="list-style-type: none"> • Although this had not been formally identified as a ‘review area’ as such, this ‘disposition and attitude’ came up indirectly as an underlying, recurring theme throughout both explicit review areas. Through the review / ‘reflective practice’ I value this disposition as very important and enabling, and an encouragement to continue to invest in nurturing self-awareness in practice (e.g. reflective practice) continuing engagement in professional development. 	<p>MAP: Barbara struck me as a person that us genuinely interested in self-driven professional development, driven both by curiosity and perceived wish to optimize performance. I felt that, several times during our interactions, it sufficed to co-develop a promising idea to set in motion a self-reflection and learning process, for which she would then pull in support as needed.</p>
<p>Other gains from the VEPR review</p>	<ul style="list-style-type: none"> • Enhanced appreciation of the value and importance of ‘reflective practice’, and having a structured setting for this to take place, as was enabled in this VEPR pilot exercise. • The self-assessment against the capabilities of the evaluation capabilities framework were actually very helpful, as this prompted an explicit and conscious engagement of what these competencies mean in practice, and my respective mastery of these, and where there may be room for improvement (and also recognition in some cases it is ‘good enough’ for some capabilities where I have limitations, but not identified them as a focus of review – still knowing my limitations in these areas is good to be aware of, so the self-assessment was very useful). 	<p>RO: Barbara’s review makes me realise one more time how “evaluation-focused” our practice easily becomes. Evaluation is not an end-in-itself but we evaluators easily forget this. Evaluation is a resource to be used. How can we build this into the mind-set of evaluators more strongly – and without compromising the added value that evaluation can offer = independent assessment of the value of policies, programmes and activities?</p> <p>MAP: I became even more aware of the challenge of institutional context, for example during the discussions of policy/criteria- versus management demand-driven evaluation questions. Real-world best evaluation practice (taking into account the</p>

		<p>institutional enabling environment) usually is not the theoretical best practice. Through her pronounced drive towards improving professional understanding and skills, Barbara gave me an injection of motivation to sustain these activities for myself.</p>
<p>Other comments on the review outcomes or process</p>	<ul style="list-style-type: none"> • The process is well thought out and choreographed throughout the four stages (application, initial review, discussion with reviewers, finalised by reporting phase). • The level of interactions between reviewee and reviewers (and pre-engagement) is nicely built up in an iterative process design. • The structured process, and document templates provided served to facilitate a reflective practitioner conversation between myself as reviewee and the reviewers. This process and the reviewers helped me to focus on my review areas, and appreciate both my strengths and maturity already achieved which I had not always been so conscious of, and were very instrumental to highlight areas for further development and encouragement to continue development paths already tentatively identified. • The process and outcome of the review gave me enhanced reassurance of what I already do well, and further encouragement to make some changes following the shared reflections on my practices. 	<p>RO: Warm thanks for both Barbara and Markus for excellent cooperation and communications during the VEPR. And for making it fun! Barbara, appreciate your feedback on the VEPR process.</p> <p>MAP: A true pleasure and so very thought stimulating. Many thanks to both of you.</p>
<p>Declaration We declare that the VEPR review for Barbara Schmidt was completed on 24.6.2017 to the satisfaction in all aspects of the reviewee and the two reviewers.</p> <p>Signed Barbara, Markus and Riitta have agreed on the report through e-mails.</p>		