



VEPR Pilot Review Report - Markus Palenberg, 6 January 2017

<p>Reviewee details <i>Reviewee name:</i> Markus Palenberg <i>EES membership number:</i> 88304 <i>Email contact:</i> markus@devstrat.org</p>		
<p>Reviewer details Lead Reviewer <i>Full name:</i> Pam Oliver <i>Email contact:</i> pamo@clear.net.nz</p> <p>Second reviewer <i>Full name:</i> Weronika Felcis <i>Email contact:</i> Weronika.Felcis@gmail.com</p>		
<p>Review details <i>Date/s of review meetings:</i> 19 December 2016 (Pam), 21 December 2016 (Weronika) <i>Medium of review meeting/s:</i> Skype <i>Comments:</i> For logistical reasons, Markus had separate Skype conversations with the two reviewers.</p>		
<p>Review focus areas (summarised in 25 words maximum)</p> <ol style="list-style-type: none"> How to manage my learning about new evaluation methods efficiently How to avoid the notorious “non-contributing fourth person” on evaluation teams 		
<p>Capabilities explored <i>These may include capabilities from the EES Capabilities Framework and/or other identified capabilities.</i></p>	<p>Learning by reviewee (total 750 words) <i>Brief outline of what the reviewee has learned through the review, and which capabilities they wish to develop or strengthen.</i></p>	<p>Reviewer comments on reviewee learning (total 500 words) <i>Brief outline of what <u>each</u> of the reviewers perceive that reviewee has learned through the review. The reviewers may identify their comments with their initials if they wish.</i></p>
<p>1. Capability to quickly and efficiently filter and appraise evaluation methods for their potential merits in my evaluation work.</p> <p>Relates to EES capabilities: 1.11 Exhibits familiarity with evaluation theories, schools and approaches, 1.12 Shows awareness of evaluation history and trends, 1.13 Appreciates the linkages between evaluation and the social sciences</p>	<ul style="list-style-type: none"> This topic shifted significantly from my initial intent to get a couple of concrete topics that might represent “blank spots” in my methods’ universe, to looking for ways to optimize my approach to educating myself about necessary and potentially useful evaluation methodology. There was shared understanding (and some irony) between the reviewers and myself about “marketing forces” at work in the development and publication of new evaluation approaches and methods, leading to method proliferation (e.g. presenting slightly adapted approaches as entirely new methods or writing books about something that could also be explained exhaustively in a couple of pages). Methods may also be shrouded in artificially complicated concepts and terms to project erudition and protect the author against criticism. This said, there are of course also powerful 	<p>PO - Markus appeared to have already canvassed fairly thoroughly the literature on evaluation theory and method, including recent developments, but was identifying his lack of formal training in social sciences as a significant reason for experiencing difficulties in finding the aspects of that literature that were relevant to his work. An important outcome of the discussion was, I believe, Markus identifying a process for de-mystifying the literature from a philosophy of science perspective. He also realised that sharing this endeavour with colleagues and the broader evaluation community will be a way for Markus to contribute some valuable aspects of this knowledge with others, as well as vice versa.</p> <p>WF – Markus seemed to be intuitively making decisions on what new methods are</p>

	<p>and useful new methods being developed, so the trick is to tell the good and ones apart from cases of emperor clothing.</p> <ul style="list-style-type: none"> • We exchanged useful ways to “filter” and “appraise” methods, for example: opinions of/ discussion with trusted peers, book reviews, blogs • Useful tips: don’t get hung up trying to be perfectionist, remember what you need in practical terms (method-wise) to get an evaluation job done. • Also: if evaluation methods are requested that will not do the job, reject tenders or influence the requirements (i.e. bring demand and supply for evaluative information together). • My takeaways? There is no silver bullet approach. It seems I’m already rather thorough at this. I can improve by using my peer network more for exchanging views on methodology. If I find the time, it would be useful to participate in a relevant blog. I also liked the reminder that these methods are means to ends and not ends in themselves. 	<p>interesting/reliable/credible to him. But he searches for some explicitness in how he is reaching his conclusions. We had very interesting discussion about applying criteria of credibility to freshly appearing evaluation methods which develop towards direction of thinking about his personal conviction about ontology, epistemology and methodology of research. Due to the course of the conversation Markus was also interested in further readings on critical realism to support his vision of research up till now.</p>
<p>2. Demonstrates capacity to manage and deliver evaluations (EES 2.1), especially the sub-category: manages resources and skills prudently so as to achieve results (EES 2.1)</p>	<p>Team selection.</p> <ul style="list-style-type: none"> • It was useful to reflect on this as part of the VEPR process. In hindsight, lack of evaluation skills was apparent at application stage in some cases where that team member later turned out to be unproductive. • In those cases, I gave my consent to staffing anyhow, driven by other reasons, for example important subject matter experience and reputation of the expert, and gender and regional balance in the evaluation team. • My takeaway? Put more weight on red flags going up during the team staffing process (“beware of early signs”), verify required skills more thoroughly, and accept lack of key skills and experience as a “no-go”. <p>Management of underperforming team members:</p> <ul style="list-style-type: none"> • Compared to both reviewers, I invest more into coaching and supporting team members in case of their underperformance. This is an interesting benchmark that led 	<p>PO – Markus was very open to exploring some of the underlying reasons why he might pay less than ideal attention to early signs of potential issues in team member selection. However the evident upside is that he accepts responsibility, possibly even more than is reasonably his, for team performance.</p> <p>WF – Markus was trying to explore all possible reasons for underperformance of some team members, including staffing process in the beginning of the process. However, after extensive and very open discussion, he agreed that his intuition often leads him to good assessment of upcoming troubles and got reassured in his current strategies of management.</p>
<p>3. Displays interpersonal skills (EES 2.2),</p>	<p>an interesting benchmark that led</p>	<p>PO – Markus has used the VEPR review process with discernment, thinking through</p>

<p>covering all 5 sub-categories: Writes fluently and communicates clearly (EES 2.21), Values team work and leads by example (EES 2.22), Uses sound negotiating and conflict resolution skills (EES 2.23), Demonstrates gender awareness and cultural sensitivity (EES 2.24), Nurtures professional relationships (EES 2.25)</p>	<p>to some reflection, helped by discussion with both reviewers.</p> <ul style="list-style-type: none"> • The fruits of that reflection: my training and experience with leading and managing teams originates from consulting (McKinsey). This was a “one code of conduct” setting of rather aligned, similarly motivated and very high performing people, plus a very strong responsibility for the team leader to develop team members and to make things work no matter what. In my present evaluation work, conditions are different. The people mix is much broader and, unless my institute holds the entire evaluation contract, my staffing and management authority as team leader is limited. My team leadership style has not adjusted enough to that. • At the same time, I found a very categoric approach we had discussed (e.g. “don’t try to bring problematic team members back”, “never micromanage”) not right for myself. Reflecting about past examples I came up with couple of examples were going an extra mile in supporting team members had effectively brought them back, helping the evaluation and making me feel good about myself. • My takeaway? Draw the line for acceptable underperformance before the assignment and keep a backup plan in mind. Before that line is crossed: continue using my team management skills and my willingness to help. Beyond that line: move to replace the team member and don’t invest more time and effort. 	<p>some of the questions and ideas offered to him and deciding what will work for him and what might not. He clearly also acknowledges that a key part of evaluation practice capability is being able to apply skills within a particular practice context.</p> <p>WF – Markus clearly is very experienced in the field he chosen for the review. He tested his abilities of managing teams in a lot of different projects, mixing people from different sectors and cultural backgrounds. This was very much a mutual learning process this time. I think most of all VEPR review helped him not to take underperforming team members as his personal management failure.</p>
<p>Other gains from the VEPR review</p>	<ul style="list-style-type: none"> • I liked Pam’s four accountability priorities (conscience, community, profession, funder). They put my own implicit priorities into words. • Several helpful references and contacts that I still need to look at/follow up on. • A bunch of interesting ideas going forward that go beyond my personal development, for example: <ul style="list-style-type: none"> ○ Evaluate the effects of team selection and composition on evaluation quality 	<p>PO – I found Markus’s descriptions of some of his practice issues and context very valuable for thinking differently about some of my own, since we work in significantly different contexts but encounter many of the same issues.</p> <p>WF – Markus’s abilities to understand how to use the best values of VEPR review were impressive. His deep involvement in the preparation</p>

	<ul style="list-style-type: none"> ○ Come up with “must have” and good quality criteria for methods and encourage assessment of new methods against these criteria (i.e. a “professionalization” of methods process) • Overall, I found the process very thought-stimulating. I benefited a lot of that during my time as for profit consultant and nurture this culture in my institute (starting from the assumption everybody always has much to learn, seeing advice and feedback as welcome support). We should have more of that in our evaluation community. 	<p>of his VEPR portfolio helped us to understand better his needs and his solutions up-to-date. Consequently, during the review he showed a lot of self-reflection effort in the open discussion. I believe it was a very stimulating experience for all parties.</p>
<p>Other comments on the review outcomes or process</p>	<ul style="list-style-type: none"> • We had planned a 3-way Skype discussion but ended up having two bilateral skypes instead. Without having a strong preference either way, I think I preferred that, as I felt the reviewers input may have been more independent from each other. • Based on my good experience with two reviewers I didn’t know before, I wonder if that couldn’t be suggested as a standard. Provides a fresh outside-in view and, imagining me in the reviewer position, I might have conflicts of conscience if I felt an old pal reviewee of mine demonstrated zero learning... • Apart from being acquainted or not, I believe a good way to select reviewers is by their self-assessed capability profile, i.e. it would be good to be able to directly search for reviewers strong in the capabilities one wants to develop (rather than having to read through a great many documents). Maybe simply list all reviewers with all their self-assessment scores in an Excel file so people can use the sort/filter functions to identify good reviewer candidates. 	<p>PO - Thanks also to Markus for the thoughtful feedback and ideas around the VEPR review process. The Working Group will certainly consider flexible options for future reviewees.</p> <p>WF – It was definitely not planned to divide the review but it has shown us also some benefits of such solution. Thank you for all your effort, Markus!</p>

Declaration

We declare that the VEPR review for Markus Palenberg was completed on 6 January 2017 to the satisfaction in all aspects of the reviewee and the two reviewers.

Signed

Applicant:



Lead reviewer:



Second reviewer: Affirmed by email