



Voluntary Evaluator Peer Review (VEPR) System Document

Part II How to apply to participate in a Voluntary Evaluator Peer Review

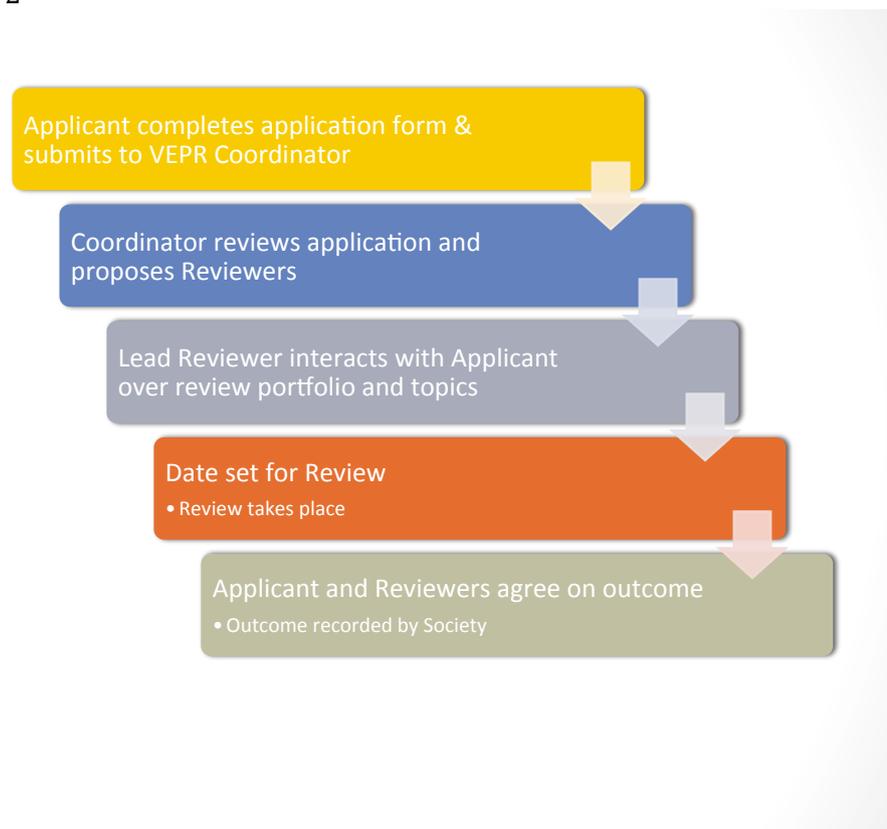
Applying to be reviewed

Information for an Applicant

Voluntary Evaluator Peer Review (VEPR) is a formal review process for evaluators to reflect on and demonstrate their qualifications, experience, professional standing and other relevant attributes in a supportive environment. It is a voluntary process open to all members of the Society who meet the eligibility criteria outlined below. The approach promotes independent peer review as a desirable accountability and professional development practice *by* evaluation practitioners *for* evaluation practitioners. It also provides a practical forum for the discussion of ethical practice and quality standards across the evaluation profession. The process involves identifying issues for review and producing a portfolio of work which forms the basis for reflection in the review.

Simple timeline

Figure 2



Who can apply

To be eligible to undertake a VEPR review, the applicant must provide evidence that they:

- Are a paid-up member of the UK Evaluation Society
- Have at least three years full-time equivalent (FTE) work in evaluation and/or evaluation-related activities
- Have had significant involvement (based on their role/s e.g. evaluator/team member, commissioner, provider, manager, educator/trainer, consultant) in a diverse portfolio of evaluation projects
- Have undertaken a relevant university qualification (minimum level diploma two years FTE) or equivalent professional development initiatives (courses focused specifically on skills and knowledge related directly to evaluation).

Normally, a VEPR review would be undertaken once every three years. A shorter interval might be desirable if a particular practice issue has arisen or further self-development is thought necessary or to respond to a commissioner's requirement for a contract.

How to apply

The application form is a key part of the process as it is used to record the background and experience of the Applicant. The form and the accompanying Framework of Evaluation Capabilities can be viewed at the end of this section and is available for completion on request from the VEPR Coordinator.

The form consists of two parts:

Part 1

Personal details and experience

Professional statement in which applicants have the opportunity to summarise their evaluation practice and career and look ahead to their desired career development

Academic and Professional information related to education and employment with a focus specifically on skills and knowledge directly related to evaluation

Two referees whom the society could contact, if necessary, to validate experience and education

Issues for the review and related documents for the **portfolio**.

Part 2

Capabilities and practice areas for the review (separate Excel file).

Fee

A fee is payable to the Society to cover the administrative costs associated with the review. Currently it is £100 plus VAT. The Applicant has to meet their own travel costs, if any, associated with the Review.

After an application has been received

The following section describes what happens next after the Coordinator receives an application that meets the eligibility criteria.

The Review and Review Report

The coordinator contacts Applicants with an up to date list of available reviewers for their information. The coordinator then selects two reviewers to match the Applicant's interests, confirms their suitability and availability in the required time frame (4-6 weeks from commencement) and appoints a Lead Reviewer to liaise with the applicant. At that point, the Lead Reviewer initiates contact with the applicant to start preparation and agree a time and place for the review face to face or via phone or Skype or similar. The review itself will follow the structure shown here and leads to a Review Report.

Outline of review meeting

Initial discussion (20 mins): Reflection on applicant's evaluation experience to date and career aims

This is the opportunity for reviewers to feedback any observations or questions they have about the congruence between the applicant's professional statement, their CV and portfolio, their self-assessment of their capabilities, and the specific issues they wish to focus on during the review meeting.

Reflecting on issues identified by applicant (up to 80 mins):

In this part of the meeting, the reviewee, facilitated by the reviewers, explores the issues identified for review focusing on the following questions in relation to the portfolio examples presented:

Evaluation:

- What went particularly well in this element of the evaluation or study?
- What was particularly good about the way you addressed it, and handled your role?
- What was challenging in this particular element of the evaluation or study? Was this a challenge that you have experienced previously, or found yourself encountering regularly in your work?
- Was there anything you felt you might have done differently?

Analysis:

- What sense can you make of the situation?
- What theoretical or external body of knowledge might help you make sense of the experience?

Conclusions:

- What can be concluded, in a general sense, from these experiences and the analyses you have undertaken?
- What can be concluded about your own specific, unique, personal situation or ways of working?
- Does it indicate any training or development you would like to undertake to support you in relation to this particular issue?

Conclusion of review meeting (up to 20 mins): Discussion of next steps

This is the opportunity a) for the applicant to reflect on the process in relation to the capabilities and issues identified at the beginning of the review and any others that have arisen; b) to develop an action plan in consultation with the reviewers which would help the applicant to move forward towards their career aims (as identified in the initial discussion) and c) address any training or development needs identified during the review.

Review Report

Process

Within two weeks of the review meeting, the applicant completes a first draft of a report, which summarises what they have learned and gained from the review. The Lead Reviewer consults with the co-reviewer to include the reviewer comments as indicated on the form.

Once the applicant and both reviewers have signed the report, the Lead Reviewer sends it to the VEPR Coordinator who also arranges for the reviewee's name to be listed on the UK Evaluation Society's website and for their member profile to be updated to show that they have successfully completed VEPR.

Purposes of the report

The purposes of the VEPR Report are (1) to demonstrate that the applicant's review has met the criteria for reflective practice, has deepened their understanding of the issues chosen for reflection and has generated an action plan to continue further reflection and (2) to add (anonymously) to the database of information for the Society on areas of capability where training or further professional development would be helpful.

Criteria for reflective practice

Reviewers will decide whether the reviewee has been able to:

- describe at least two events/situations and their context with sufficient detail, but concisely enough, to communicate the main points to the reviewer
- identify essential elements of the issues chosen for reflection
- link these to one or more specific capabilities
- describe their own thoughts and feelings about the issue
- ask searching questions for themselves about their experience (rather than looking to the reviewer for advice)
- answer searching questions from the reviewer concisely in a way that demonstrates a capacity to reflect
- reflect on what underlying frames of reference (evaluation theories and frameworks) they were using
- draw implications /conclusions from their reflection and consider how it links to chosen capabilities or others that have arisen.
- outline concrete learning goals and plans for future action

A blank Review Report form is shown on the next page.

Review Report Form

Applicant details <i>Full name:</i> <i>Email contact:</i>		
Reviewer details Lead reviewer <i>Full name:</i> <i>Email contact:</i> Co-reviewer <i>Full name:</i> <i>Email contact:</i>		
Review details <i>Date/s of review meetings:</i> <i>Medium of review meeting/s: [e.g. phone/Skype/in person]</i> <i>Comments:</i>		
Capabilities explored	Learning by applicant (total 750 words)	Reviewer endorsement (total 500 words)
1. [Capability]	[Brief outline of learning]	[Reviewer comment]
2. [Capability]		
3. [Capability]		
Other gains from the VEPR review	[Applicant benefit]	[Reviewer benefit]
Other comments on the review (outcomes or process)	[Applicant comment]	[Reviewer comment]
CPD action points		
Short statement by the applicant of their experience in the review for publication on the Society's website		
Declaration "We declare that the VEPR review for [applicant full name] was completed on [dd/mm/yyyy] that the process was rigorously conducted and the reflection on practice led to an action plan to further develop the applicant's evaluation capabilities."		
Signed Applicant: _____ Lead reviewer: _____ Co-reviewer: _____		



Annex to Part II
VEPR Application Form

VEPR Application Form

Part 1 Personal details and Experience

Personal details

Name	
Contact details:	
Address	
Telephone (s)	
Email	
Confirmation of current Society membership	
Have you participated in a UK Evaluation Society VEPR before? If so, when?	Yes/No Date

Professional statement

Give a short statement to summarise where you are in your evaluation practice and career at the present time and how this relates to issues you propose for review

Max 100 words

Looking forward, what are your objectives for your evaluation practice?

Max 50 words

Education and professional experience

Please attach a short version (*no more than five sides of A4*) of your CV edited to reflect aspects relevant to evaluation. List:

- Post graduate education and training indicating in what ways this education and training was relevant to your evaluation practice
- Professional experience to demonstrate three years full-time equivalent evaluation work or related evaluation experience within recent years.
- The activities carried out in your primary evaluation role for example as: Practitioner; Commissioner; Teacher; Researcher etc.

Referees

Please nominate two referees familiar with your evaluation practice who can confirm your experience. They do not need to be Society members.

1	
2	

Issues for Review and related documents for the portfolio

In this section, please set out two issues you wish to discuss relating to your development as an evaluator including at least one that you wish to strengthen.

Several anonymised examples are available to illustrate how previous reviewees have set out the issues, capabilities and settings. These can be viewed or downloaded from this link (<https://www.evaluation.org.uk/professional-development/voluntary-evaluator-peer-review/>).

First Issue

Issue related to your development as an evaluator: What do you wish to discuss?	
Capability or career development issue being explored.	
Setting the scene Brief description of project, client, evaluation approach and methods used. What was your role? Were you working alone or with a team?	
Illustrating the capability: Describe the specific element of the project which illustrates the capability being explored.	
Details of documents attached: <ul style="list-style-type: none"> • Original examples must either be documents in the public domain or accompanied by written permission from the client or holder of the intellectual property. Otherwise draft a short précis to explain the context and issues. • Attachments must be no more than 20 pages or should indicate specific pages to be read in a longer report. 	

Second Issue

Issue related to your development as an evaluator: What do you wish to discuss?	
Capability or career development issue being explored.	
Setting the scene	

Brief description of project, client, evaluation approach and methods used. What was your role? Were you working alone or with a team?	
Illustrating the capability: Describe the specific element of the project which illustrates the capability being explored.	
Details of documents attached: <ul style="list-style-type: none"> Original examples must either be documents in the public domain or accompanied by written permission from the client or holder of the intellectual property. Otherwise draft a short précis to explain the context and issues. Attachments must be no more than 20 pages or should indicate specific pages to be read in a longer report. 	

Before you submit this application please check that you have completed all parts of the application:

1. Completed your personal details	
2. Drafted a professional statement and objectives as an evaluator	
3. Included a short version of your CV	
4. Identified and described two issues linked to two different Capabilities with their context and background	
5. Attached or provided links to suitable documentation to illustrate the issues and what you want to discuss	
6. Completed and submitted a Capabilities Framework self-assessment	
7. Signed and dated the Declaration	

Declaration

<p>I declare that the expertise, skills, qualifications and other attributes described above and in my CV are an accurate record.</p> <p>The information you have entered on this form and the statements of issues are solely for the purpose of organising and managing a voluntary peer review. Information will be shared with the VEPR coordinator and agreed reviewers. It will not be shared with any other organisations. You can contact the VEPR Coordinator at any time and ask for your information to be deleted from the UK Evaluation Society records.</p> <p>By signing here you signify your agreement for the UK Evaluation Society to use information you provide for the VEPR review and follow up reviews and on the understanding that it will not be used for any other purpose or shared with other organisations.</p>	
<i>Date</i>	
<i>Signature</i>	

Part 2 Capabilities and Issues for the Review

Capabilities: self- assessment

The Capabilities Table in this section is an illustrated example for your information. The version of the Table for completion is an Excel file that can be downloaded from the UK Evaluation Society website (<https://www.evaluation.org.uk/professional-development/voluntary-evaluator-peer-review/>) or you can request a copy from the VEPR Coordinator.

The table below contains the UK Evaluation Society's Framework of Evaluation Capabilities. In the middle column make an assessment of your own capability using a six-point scale explained below. In the third column, to give substance to that judgment, reference in note-form those examples of your education, training or work experience that you think would support your assessment. This will provide a record for next time you update your assessment. Please rate every criterion, the ratings take account of 'little or no experience'.

Six-point scale – 1 is little experience, 6 is a lot.

- 1 I have no specific training in this area and have developed no capability through my evaluation practice.
- 2 I have basic training and limited experience through practice.
- 3 I have further training or education and practical experience in one or two instances.
- 4 I have moderate* practical experience with this capability evidenced through my work.
- 5 I have substantial practical experience with this capability evidenced through my work.
- 6 I have substantial practical experience and have studied this capability through education, training or research.

The table overleaf lists the capabilities and contains examples of ratings and supporting information about experience and training. The capabilities follow the 2019 version of the Framework of Evaluation Capabilities. This framework is currently under review and the list will be amended once the revision is complete.

*For guidance 'moderate' implies experience in 3 to 5 instances; 'substantial' implies more than 5 instances and in multiple contexts or settings

UK Evaluation Society's Capabilities	Indicate your assessment of each capability using the six-point scale.	Supporting examples of your education, training or work experience.
1. EVALUATION KNOWLEDGE		
1.1 Understands the social and political role of evaluation		
1.11 Awareness of the history of evaluation and its emergence as a distinct field of inquiry	4	Evaluation course as part of my Masters (2011); personal reading; attendance at UKES and EES conferences; researching Theory Based Evaluation, Theory of Change and qualitative research methods to produce internal guidance papers
1.12 Appreciates the linkages and differences between evaluation and social research	2	Own reading: Qualitative Research & Evaluation Methods: Integrating Theory and Practice, 4th Edition (Patton, 2015), etc. See also my blogs: (address 1) (address2); etc.
1.13 Indicates familiarity with the use of program theory in evaluation	5	Part time secondment within my organisation in 2016 to research theory based evaluation and improve our understanding of it internally; delivering training on Theory of Change; developing and working with theory in four evaluations since 2016
1.14 Understands the political implications of different evaluation theories and their use	3	Some experience in reading around different approaches to evaluation and their normative underpinnings (including realist evaluation, utilisation focussed and participatory approaches to evaluation, critiques of RCTs etc)
1.2 Familiarity with evaluation designs and approaches		
1.21 Is familiar with a range of evaluation theories and approaches	5	Considerable reading around evaluation theories and approaches, and part of an internal working group on evaluation design to support design in business proposals. Currently developing an internal evaluation design tool to help guide decisions at bidding stage
1.22 Knows how to engage effectively with evaluation stakeholders	5	Have designed six or seven evaluations since 2013 that engage with stakeholders using stakeholder analysis (systems approach), KIIs, participatory rapid assessment exercises, participatory hypothesis design workshops, participatory validation workshops, etc.
1.23 Identifies relevant evaluation questions	4	Mainly trying to refine or adapt questions posed by clients to make them operational – in the evaluations mentioned under 1.22
1.24 Knows how to design an evaluation appropriate to the evaluation task	4	See 1.21. However, much more experienced / confident in theory based approaches than in other approaches.

UK Evaluation Society's Capabilities	Indicate your assessment of each capability using the six-point scale.	Supporting examples of your education, training or work experience.
1.25 Takes account of the policy context in designing evaluations	1	I have considered this in reading around evaluation theories, approaches and design choices - although not a specific part of any training I've received and I have not had to deal with this in my evaluations so I don't feel particularly confident in this area
1.3 Comprehends and makes effective use of evaluation methodologies		
1.31 Appreciates advantages and potential constraints of qualitative and quantitative methods	4	Research methods course as part of Master's degree; established an internal qualitative methods reading group which considered these issues; developed a training course and How To Note on qualitative methods. Much more confident with qual than with quant.
1.32 Appreciates different uses of monitoring systems and indicators and their role in evaluation	3	Internal training at work on monitoring systems and indicators; developed a monitoring framework and indicators for one particular evaluation and an M&E toolkit for a client. However, only limited experience and less confident with monitoring systems than I am with evaluation
1.33 Understands participatory approaches and the contexts in which most appropriate	4	Training on outcome mapping and harvesting; PEER; PIALA and Reality Check approach. Applied PEER and outcome harvesting as well as Most Significant Change on various jobs
1.34 Realises which methods are appropriate for formative/summative purposes	2	I haven't worked much on formative evaluations, but reading on evaluation approaches and recent involvement in a process evaluation has given me some awareness
1.35 Comprehends that criteria for validity and reliability differ according to method	4	Have gained a good understanding of this through reading, as well as through applying realist evaluation, contribution analysis and process tracing, and feeding learning into training, practice papers, How To Notes
2. PROFESSIONAL PRACTICE		
2.1 Demonstrates ability to manage and deliver evaluations		
2.11 Ascertains the social /political context and program logic	4	I have been involved in developing context-aware Theories of Change in several evaluations, and have applied political economy analysis principles in one. I have also delivered internal training and written internal guidance on Theory of Change
2.12 Conforms to relevant ethical standards and guidelines	4	I helped develop and implement a child protection policy and ethical principles in an evaluation of a violence against women and girls programme; have assisted

UK Evaluation Society's Capabilities	Indicate your assessment of each capability using the six-point scale.	Supporting examples of your education, training or work experience.
		with IRB process in an evaluation; and have also participated in internal workshops and discussions on research ethics and safeguarding
2.13 Identifies data gathering instruments appropriate to the task	4	Identified and developed (mainly qualitative) data collection tools in a number of evaluations, weighing up pros and cons of different methods, and suggesting new tools where appropriate
2.14 Gathers relevant evidence, analyses and interprets in context	5	Conducted and managed data collection in numerous settings, with most experience in semi-structured interviews, focus groups, document reviews and participatory workshops
2.15 Conducts robust data analysis, whether qualitative or quantitative	6	Analysis of qualitative data was studied during my masters. Conducted and managed data analysis in numerous cases, mainly qualitative (or analysing and integrating quantitative monitoring data with qual primary data collection)
2.16 Reports fairly and justly to agreed audiences in the public interest	5	Written up findings and reports in numerous cases for commissioners and other audiences
2.17 Disseminates evaluation findings and promotes their use	4	Responsible for dissemination strategies of two evaluations; presented evaluation findings from several others to commissioners and other audiences
2.2 Demonstrates interpersonal skills		
2.21 Writes fluently and communicates clearly	5	I have improved my evaluative writing capabilities over time, including through participating in internal writing and comms training. Over time, I am increasingly trying to structure evaluation reports around 'telling the story' of a programme in a clear and compelling way, as opposed to mechanically reporting on evaluation questions
2.22 Shows ethical sensitivity in specific socio/political contexts	4	I apply my organisation's ethical code of conduct in every evaluation, and actively consider issues such as anonymity, consent, power dynamics etc when conducting fieldwork and writing up findings. I have some familiarity with working in sensitive socio-political contexts
2.23 Uses sound negotiating skills	2	Some experience of this in fieldwork settings but have not been actively involved in client negotiations or received any training
2.24 Demonstrates cultural and gender awareness	3	I always seek to be culturally and gender-aware when participating in fieldwork - however in practice I'm aware that I haven't 'mainstreamed' my gender awareness as much as I would like to

UK Evaluation Society's Capabilities	Indicate your assessment of each capability using the six-point scale.	Supporting examples of your education, training or work experience.
2.25 Displays impartiality in conducting and reporting evaluation	4	Endeavour to embed impartiality through data collection, analysis and write up, including through being aware of my own biases
2.26 Manages conflicts of interests and values fairly	2	Some experience of managing conflicts of interest but mainly small scale and relating to commissioner requirements and expectations.
3. QUALITIES AND DISPOSITIONS		
3.1 Demonstrates ability to adapt to changing circumstances in a principled manner	5	A constant part of my job. Examples include planning fieldwork within shifting parameters in one evaluation; evaluating an adaptive intervention requiring regular changes to evaluation timings, methods etc; adapting to a shift in commissioner priorities over time
3.2 Exercises sound, rigorous and fair judgment	5	Again, a constant part of my role, embedded throughout evaluation process, data collection and analysis, as well as in project and team management functions
3.3 Contributes to the professional evaluation community	5	Presented at a number of conferences (UKES, EES, Realist Evaluation conferences) as well as CDI seminars; published practice papers and numerous blogs; chair a Realist Evaluation Learning Group
3.4 Displays independence of mind and integrity especially when evaluation challenged	3	Haven't experienced evaluation being challenged - but have needed to defend findings when disseminating to clients and stakeholders
3.5 Upholds democratic values in conducting and reporting evaluations	4	Examples include ensuring different stakeholder groups have a chance to have their say; considering equity issues in recruitment and sampling, ensuring participants' voice can be heard in write ups
3.6 Displays self-knowledge and pursues professional development	5	Making time to attend conferences, workshops and internal seminars, reading in my spare time, writing papers, participating in internal and external evaluation training. CPD or development courses include: SROI training, Emerging Practices in Development Evaluation; recent reading - Qualitative Research & Evaluation Methods: Integrating Theory and Practice, 4th Edition (Patton, 2015); The Politics of Evidence and Results in International Development: Playing the game to change the rules? (Eyben et al (eds), 2015); System Concepts in Action (Williams, 2009), etc