What's that? I reckon it's a Peer Review
Reflections, surprises and learnings of a pressure cooker experiment

## Russell Kerkhoven & Bram Langen

With reflections by:
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ABSTRACT: Peer review is increasingly suggested as a method of improving development practice. We undertook an experimental exploration of a peer review approach involving five external peers. The excitement, yield and reflections of the peers and ourselves are used to illustrate the potential of the 'pressure cooker approach' we followed. We identify and discuss further design and working principles used: openness, handing over the stick, selection of peers, diversity and synergy, focus and synchronization, and an appreciative approach. Linking this to the actual peer review process and output. We revisit our design and working principles and articulate key lessons and conclusions: adhere to your design principles, selection of peers, synchronization, member input and value for peer reviewers and ourselves. The exploration of peer review methods should continue.

Introduction

Over the past years in The Netherlands there has been persistent call for use of peer review methods in the development sector. To date this has not yet become common practice. We decided to design an experiment with this method for our own organisation. An experiment with a double aim: our peer review would provide feedback from (Southern) peers and it would enable us to identify important dynamics of this method. From the beginning we emphasized the emergent nature of the process and reflection, and were insistently transparent about the exercise.

A further reason for exploring peer review as a method is that we, like many other organisations were recently subjected to an external evaluation in the form of consultants acting as auditors-inspectors. They had accepted to work with a brief and process design that purposely excluded a learning dynamic. Our pleas were dismissed with *'we do not have time*

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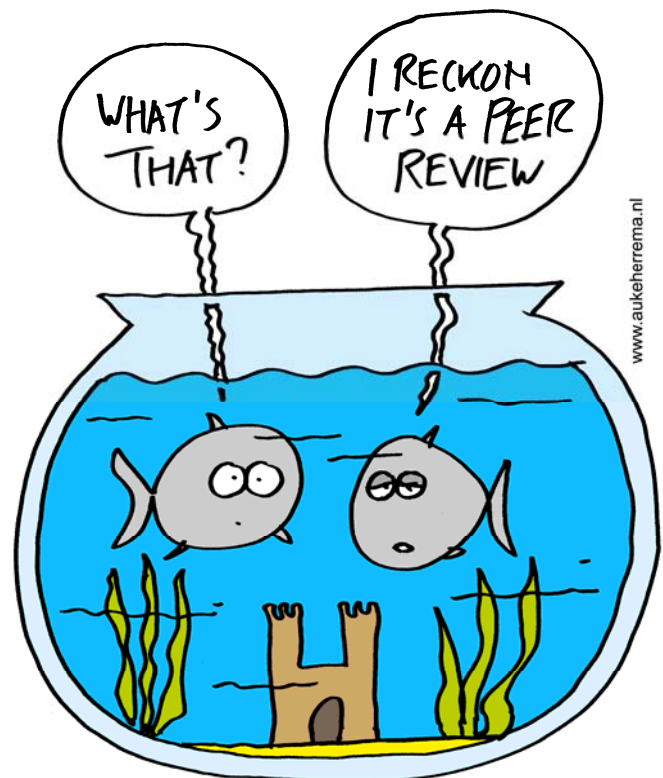
for such soft methods'. After having endured this process and the subsequent report, we realised that this sort of appraisal exercise is fraught with problems pertaining to the relationships, results and outcome. As an association of capacity building organisations PSO has increasingly sought to assist members in learning from (their) practice and to use a variety of methods and approaches. This means that if we want to stimulate the use of peer review we might as well explore this ourselves by organising our own peer review, this can best be described as an attitude of 'walk your own talk (1).

This article presents an insight in the design and dynamics of the peer review approach we developed, including our reflective analysis. It starts with the need to define the type of peer review you want to follow. Subsequently we revisit our design principles, the process in practice, our reflections and the reflections of the peer reviewers. In the lay-out we have followed a format in which we frequently use original quotes to illustrate key observations and lessons learned. We hope to encourage and empower others to use peer reviews as a method for learning and to design their own peer review exercise and share these. The original Peer Review and reflections by the invited peers has been published separately in full and is available from the PSO website (2).

The Concept of Peer Review

We found that people and organisations have very different interpretations of the concept of 'peer review'. For some peer review signifies the interactive review by fellow practitioners, colleagues of one's work, a form of horizontal or joint learning. For others the concept of peer review is linked to the review process of scientific papers by recognized expert academics. This situation is potentially confusing for all involved, as we experienced ourselves when discussing the proposed PSO peer review. Heated debate and confusion ensued with rapid judgments being passed: 'THAT is not what I understand by a peer review!', or 'I thought that peer review was by colleagues and these people are not colleagues!'. Also the peer reviewers shared such different perceptions of the peer review concept.

> *Bruce: My first thoughts when I received an intriguing email from PSO to contribute to their peer review process were "It sounds interesting but what kind of peer review is this?" My understanding of peer review was limited to commenting on publications but this PSO proposal was clearly going way beyond the scope of that type of peer review.*

> *Anneke: Interesting initiative, sounds like an innovative enterprise: I would like to join especially because I am facing some fundamental dilemmas in traditional evaluation work that need to be overcome.*

> *Sadiqa: This was my first experience of not only getting involved in a peer review but even of hearing about this method. It may be happening in some parts of the world but certainly not in mine. Here individuals and organisations would hesitate in opening up and offering themselves to be subjects for professional critique.*

Genuine peer review is considered to be achievable when both the research and the review of the research are able to be examined openly. 'Sense about Science' - a website that aims to clarify debates about science and medicine - has a section dedicated to Peer Review (3). Their 'short guide to peer review' presents four features that are common to any genuine review exercise. Firstly, Comment on the validity - are the results credible? are the design and methodology appropriate? Secondly: Judge the significance - Are there important findings? Thirdly: Determine its originality - are the results new in the sector or different from what is commonly understood? Fourthly, give an opinion on what to do with the results. These four points hold true for all reviews. This seems to suggest that the concept of who and what is a 'peer' is an important discussion.

Browsing through Wikipedia on the keywords: 'peer review', ´peer´ and ´sham peer review´ it is obvious that the health service sector is the most advanced in the use of peer review methods. A common description can

be abridged as: Peer review is a process by which a committee of colleagues investigates the service rendered; it is a means to provide independent opinions conducted by an objective group of colleagues that quickly resolve problems that service institutions face. In the education sector the concept of visitation commissions might be somewhat similar to these kinds of peer reviews. The distinction between peer review and performance appraisal appears to have blurred. Other approaches even equate peer review with performance appraisal and emphasize the link with quality management purposes such as accreditation.

It becomes obvious that the perceptions of and dynamics involved in a peer review are quite variable, even more so as there is insufficient (published) practice referring to development or civil society use of peer methods. This was the first lesson that we learnt: When talking about peer review, you need to clarify what is meant with peer review in the identified setting. What is it you want to achieve? What sort of review process is envisaged, i.e. a focus on independent assessment and the engagement of recognised international individuals or a focus on joint learning in action with a fellow practitioner active in a similar setting or context.

Our working definition
We were clear that we were looking for outsiders (the team of peer reviewers), who were recognised as knowledgeable and experienced in one or more appropriate domains linked to international development and civil society. We added that we sought review members, who were not part of our normal working relations. The latter to ensure that there was some critical distance. It is rare for a single organisation or individual to spot lessons, inconsistencies, mistakes or flaws in a complicated piece of work. This is not because deficiencies represent needles in a haystack, but because an opportunity for improvement may stand out only to someone with special expertise or experience.

We were expecting clear strategic feedback on our current monitoring and evaluation system, the combination of learning and strategic funding, the position of knowledge and learning within the association and on our understanding and practice of capacity building. Although we had these expectations, the peer review was still open to address other issues they found to be worthwhile.

Our working definition: *Peer reviewing is a process in which one subjects one's organization's work and ideas to the scrutiny of others who are* experts *in the field, because we believe that such outside opinions give strategic direction and stimulate improvement.*

Important principles that we started to design from were: Stimulate debate in a cocooned environment and add a pressure cooker element, create an open process and hand over the stick, pay proper attention to the selection of a divers group of peer reviewers, keep an organisational focus and synchronize with other organisational processes, be transparent and take an appreciative approach.

Our Peer Review Experiment
We planned our experiment by developing detailed Terms of Reference (ToR). This document describes the objectives, envisaged process and brief profiles of the persons invited. This iterative process of getting to this ToR provided most useful for PSO. It guided discussions within PSO and provided an important basis for contracting the peer reviewers.

> *Bruce: The Terms of Reference for the peer review clarified some points for me but raised a number of new and interesting issues: "How could outsiders develop an in-depth understanding of PSO from documents only – without even visiting the office?" "Why are we not being encouraged to interview PSO staff?" were two of the questions uppermost in my mind.*

The primary objectives of this PSO peer review process are:
- To get an informed integrated external reflection on where PSO comes from, where it stands and where it is going, relating it to our context and global trends and discussions in this context

- To be stimulated to reflect on the reflections of the peer reviewers and to build ideas on how to move forward (4)

The secondary objective is to experiment with the method of peer reviewing your organization's practice. We want to share experiences and reflections on the use and usefulness of this method with members, partner organisations, peer organisations and others. So from the beginning we wanted to use this peer review exercise as a method of promoting the exploration of peer review amongst our members. We hoped that a real life example close to home would encourage and if necessary convince other organisations to follow our example. We were upfront about this from the beginning.

Peer Review Design Principles

The Pressure cooker approach
Our design process for the Peer Review process coincided with the formation of a new Coalition Government in The Netherlands. Six individuals from three different political parties were 'locked in' for several days in a rural setting away from day to day commotion. This set-up inspired us for the design of the Peer Review: create a situation were a limited number of people are given a task that involves sharing of thoughts and creating synergy by getting people together in an inspiring setting with only limited time on their hands. We figured that five days would provide sufficient time for peer reviewers to get acquainted with PSO and each other, to reflect and share and to prepare for the feedback workshop and lay the basis for the final report.

> *Bruce: Russell and Bram had earlier described the peer review as a 'pressure cooker'. The 'pressure cooker' lived up to its name in one way – we lived, ate and breathed PSO for the week we spent together! From breakfast to bedtime we were individually and collectively involved in reflecting on PSO.*

> *Tony: The process worked surprisingly well and productively. This was not obvious. The methodology was un-tested, the group unknown to one another, while the group also had limited familiarity with the PSO world. ... Surprisingly, the cocooned environment within which we were placed enabled us to rapidly build up a good picture of the PSO world and to identify critical issues for further exploration. What we lacked in terms of access to hard data was made up by the opportunity as a group to exchange ideas and advance our thoughts.*

> *Davine: Another interesting experience for me was being an "insider looking out". The "pressure cooker' idea of Bram and Russell worked in that I felt I was living inside a room full of PSO and its life. I was inside. Typically one is outside and looking in. I don't understand it, but I found it intriguing.*

The peer review team had access to an enormous amount of information on PSO: policy papers, notes from the general assembly, evaluation reports, publications from PSO's learning trajectories and all kinds of gray PSO

YEAH.. I HAVE A CLEAR VIEW INTO THE PSO KITCHEN

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literature. To ensure the peer reviewers were not entirely cut of we provided them with the opportunity to ask for more factual information whenever needed. They could either ask questions over e-mail or save their questions for the evening sessions where they had the opportunity to talk to representatives of member organizations and PSO staff. In practice they asked for more detailed information once over e-mail. The dinner conversations were much more intense, they provided an opportunity for in-depth conversations and further information gathering, it also create some rhythm and forced peer reviewers to make a daily inventory of questions within the group.

> *Bruce: Each evening we were joined for dinner by a small number of people (from PSO and member organisations) and these meetings proved to be invaluable opportunities for us to clarify our understanding of what we affectionately called "the PSO system". Indeed, without these evening discussions the review would definitely have been less well-informed. However, despite the lack of any real break, the time didn't feel overly pressured – indeed the way we were looked after made the experience as comfortable as it was possible for such an intensive task to be.*

> *PSO staff member: Challenging questions were being raised on how we as PSO influence our members; how this has changed over time and what we want to achieve in the quality improvement of members. It was not always easy to articulate a clear answer. During the conversation you identify small , step by step success experiences, useful to see and celebrate these!*

Openness of the process and 'handing over the stick'

Besides a broad scope of the Peer Review we explicitly stated that the peer reviewers were free to explore issues and directions of analysis that they perceived as worthwhile. We suggested eight themes of importance to us, they ranged from: 'our approach to civil society development to the Aid Chain' to 'gender' and 'our role in supporting learning' (5). Where necessary the peer reviewers were invited to adjust the method as deemed fit. They would have to decide themselves on the exact design of the process. To assure independence, no PSO staff members were present during the peer review process (except at the start and over dinner).

> *Bruce: Bram Langen and Russell Kerkhoven kicked the process off by talking about their hopes and expectations but it quickly became clear that the peer review team really were in control of the process. None of the parameters established by the terms of reference were set in stone and we were encouraged to do whatever we thought would deliver the best results. Our PSO colleagues then departed and there we were in a semi-rural location distant from the PSO office - a group of 'strangers' with a pile of documents, a pleasant room, all the coffee, tea and snacks we could possibly want and a WiFi internet connection!*

> *Davine: I particularly enjoyed the approach the peer review offered which was one of an "undirected awareness" rather than a more directed one. Typically a ToR provides very clear pointers to the reviewers regarding what the client wishes evaluated; and the reviewers follow these leads. In this case we were not directed. Rather we were able to allow the space and time for what was there for each of us to emerge. And to reflect on this and make comment from a place which was not working with a hypothesis or objective.*

The flexibility offered was well picked up by the peer review team. On the fourth day they break out of their cocooned environment and announce a visit to the PSO offices in The Hague. On arrival, they freely roam around the building, meet with colleagues and we have a small brainstorm about the logistics of the feedback session the following day. During this session it becomes obvious that the review team has formed definite ideas about this session. Without much ado we agree that the reviewers will lead the feedback workshop and we will provide the head and tail end of the session. The enthusiasm of the reviewers radiates out.

Diversity and Selection of peers
We applied the diversity principle in a number of ways. Obviously a range of professional expertise, knowledge and experience is an important feature of the review committee. This assures that a range of different perspectives is applied in the review. It also assumes that the reviewers will be able to engage in a productive dialogue with each other.

Selection of people was approached by consulting colleagues in our organisation, our member organisations, Southern organisations, PSO's International Advisory Board members and external consultants we had worked with in the past. This 'word of mouth' exercise yielded a gross list of possible candidates. We explicitly sought names of people who had no history of long standing formal working relations with us. At best they were colleagues from over the horizon. A further reason for using word of mouth was that we needed to know if the candidate had a proven ability to work closely with others and accept viewpoints and methods that are different. The reflections of the reviewers show how much tension and uncertainty was involved in this approach:

> *Bruce: Nevertheless, the invitation and TOR were intriguing and I was hooked! I was particularly looking forward to working with a small group of internationally recognised experts and at the same time, rather concerned about how it would be to be part of a group with a high profile task that had never worked together before. However, I am well known among colleagues for the phrase "Let's trust the process" so I happily accepted the invitation and looked forward to seeing how things unfold....*

> *Tony: The "chemistry" among group members worked out remarkably well. This can in part be attributed to a careful selection of participants by Bram and co. but in large part, it was good fortune.....we found among ourselves a high degree of common interest and a willingness to work in a collegial spirit. Most importantly, we kept an open mind to the process, willing to take part in the experiment and keen to make it work.*

> *Sadiqa: Method was only one surprise. The other, a stronger one, was about my selection as one of the peers. I am not a professional consultant, not a big name in the field and perhaps not totally familiar with the diction and jargon of the consulting business. My only strength is that I work with those who are ultimate beneficiaries of the aid chain - the marginalized communities of the South. ...*

We did not 'appoint' one of the peer reviewers as the 'lead' peer reviewer; all were equally important and equally able to facilitate the process.

> *Davine: There was no leader. Probably this is also a result of our process-oriented approach. It had great advantages in the process as we all pulled our weight and decisions were taken together.*

> *Anneke: There is more in the process than only sharing the same feelings and opinions, because we also respect differences in opinion. There are differences in opinion, because we have different backgrounds, different beliefs and made different choices in life. Probably the respect for other opinions, the attempts to understand each other and to find common ground are even more valuable.*

We deliberately looked for Southerners and avoided tokenism. On the basis of the gross-list we began to identify interest and availability. This means that after three candidates have agreed to a period, you look for a match in that sense, consequently candidates drop out simply because of timing. All in all we were surprised by the positive feedback we received from the names approached. This suggests that there is a definite interest in exploring alternative review methods and participating in an experimental review design.

Organisational focus and synchronization
The PSO peer review was set up with an organisational focus, we canvassed for internal support by presenting

the initiative well before hand to the organisational leadership, Director and Executive Board. The board was unanimous in their support for the exercise, while fully understanding the political dimension of the initiative. By requesting input from our Programmes & Advisory-section we triggered internal debate, received valuable feedback and established synchronization with the planned 'meta evaluation' exercise (6). As a PSO learning event on Capacity Building took place during the peer review week, we created the opportunity for some of the peer reviewers to be involved in this process and experience PSO's work in practice.

Synchronization with other processes, such as the recently established International Advisory Board occurred on an individual basis through consultation on possible review candidates and by sharing their recent recommendations to PSO.

> *Tony: [The peer review] did not substitute for neither a formal strategic planning process nor evaluation, but complemented these. That said, in the future, the process could possibly be more closely aligned with such processes, thus serving as a first step in an on-going strategic planning process or alternatively, as an element of a more formal evaluation process.*

Transparency
We emphasized transparency by discussing and presenting our ambitions and motives from the beginning, both internally and externally. This meant that we were open about the experimental nature of the overall design, we were unsure if it would work and what the results would be. The reviewers were aware that we invited them to participate in an experimental design, including the pressure cooker. We explained the dynamics and our image before hand, partly as a caution. It is our impression that this only triggered their interest at the time. From the beginning we planned to reflect on the process and outcomes with the reviewers and colleagues.

We further applied this transparency principle by collecting all printed and published documentation since 2003, including work in progress. The collection of this material was a further lesson, as it meant facing that too many of our materials are not routinely made available in English. We organized the materials according to theme and topic and within that in chronological order. All this material was put in folders and stacks in one room and available to the reviewers for the review period. Besides the 'normal' tools needed for an extended participatory session, such as flip charts, tape, a notebook, internet connection etc.

Appreciative approach
An important principle of the design was that given the experimental nature of the process we were looking for an encouraging form of scrutiny, rather than a distant judgemental review process. *Showing work to others increases the probability that weaknesses will be identified, and with advice and encouragement, fixed (7).* An appreciative inquiry that would maximize the possibilities of mutual learning for us and our members.

> *Davine: Firstly I was delighted to be invited to participate in this process. I realized how unusual it was – considering the number of so-called evaluations being carried out by consultants at the request of donors (not the client organisation itself) and which take a deficit-orientation looking for what has not been achieved. So I was very pleased to be involved. And very excited about working in this very different way.*

The Peer Review Process

What happened? The flow of the process
On the first day of the peer review we facilitated introductions and handed over the 'stick' to the reviewers, although we were desperate to be a fly on the wall after we left the reviewers behind, we stepped out of the active role. To the maximum extent the following sections of the reviewers are as they wrote about the actual days in the pressure cooker.

Bruce: In the lead-up to the review week PSO did its best to encourage contact between the peer reviewers by setting up an exclusive Google group to which only the team and PSO had access. The peer reviewers were encouraged to post details of ourselves and the group was also used to make important background documents available. Despite his efforts to encourage contact, the google group was underused as a means of building relationships between the peer reviewers prior to the review and most of us relied on receiving hard copies of the documents sent out. Soon it was time to set off for The Netherlands and to be part of the interesting adventure that was unfold over five days in late March 2007.

Sadiqa: [The first] meeting with Bram and Russell clarified the methodology and expectations further. We had to set our own limits as the process was not an evaluation, a strategy planning exercise, or a program design assignment. Interestingly we had excess to all information, documents and people. We had five days to explore, reflect and present our views. For me a very interesting process was the distribution of work without anybody taking the lead. I still cannot clearly recall how we decided what each of us would be looking at without really having a discussion on our personal strengths and weaknesses. But very beautifully we ended up in having our own areas of interest without losing the large picture. We all felt free in commenting on each other's suggestions and analysis and were concerned about logical sequence and internal consistency in what we were saying.

Tony: What we lacked in terms of access to hard data was made up by the opportunity as a group to exchange ideas and advance our thoughts. The process enabled us to acquire a "helicopter" view of PSO and in so doing to identify key strategic questions and dilemmas that the organisation faces. We avoided getting bogged down in detail. However, the occasions of meeting with staff in the evening enabled us to garner more specific information that helped to confirm and/or refute ideas and arguments that we were building up. Access to staff therefore was indispensable, ensuring that while we developed our helicopter view, we did not loose touch with reality. Doing so also helped build our own legitimacy or credibility in the eyes of PSO staff who might otherwise have thought that our musings were based on only a partial understanding of what is happening.

Davine: It was a deep privilege to work with extremely competent people with specific interests who brought their experience to the table and I could rest on this and explore more deeply my line of enquiry. As a result we seemed to work at a "meta level". We were not scurrying around with dates and numbers and stats and items of information (and diverse opinion) from a range of interviewees. Rather we were trying to understand the whole of PSO in its world and how it sought to be effective. ... I also enjoyed working with information gleaned from the reports and paperwork and then checking ideas and asking questions each evening of the person dining with us. It made information somehow more powerful (not that it is objective) than opinion. This, opinion, is often what a review relies on – albeit that the client wishes it more "scientific" or provable.

Bruce: We used systems methodology, brainstorming, card sorts and a range of other techniques to share our developing understanding of the PSO system. However, by Wednesday the prospect of presenting our analysis at a workshop to be held on Friday was beginning to overshadow my thoughts - would I (and would we as a team) be able to draw together our ideas in a coherent way by then? By Thursday afternoon, I felt the need to get out of our 'pressure cooker' and suggested a visit the PSO office to get a feel for the organization's working environment. I was pleased that my fellow reviewers agreed with the idea of giving our initial feedback about the process to PSO at their office rather than our base as PSO had originally suggested. Seeing an organization's working environment enriches my understanding of the organisational culture and values and helps to make the organisation more 'three-dimensional'. Despite the travel time involved, we all agreed it had been worth using some of our precious time on a 'decompression' visit to the outside world.
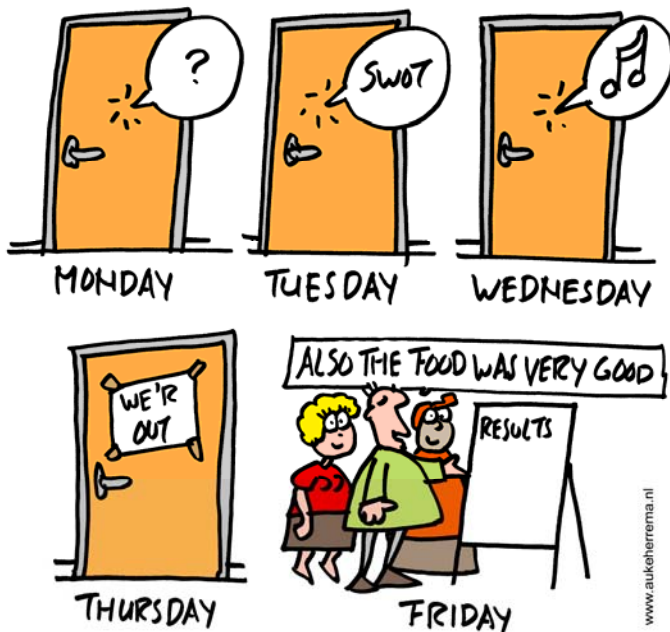
Anneke: First, let's try to understand: both understand PSO and understand each other.

- *Are we really supposed to stay here? How will we collect information? Can we deal with only the documents, ourselves, and the dinner guests and come up with an interesting analysis?*
- *OK, let's start on Monday afternoon to get some common understanding and to better know each other. Bruce is already pinning cards on the wall. My basic feeling at that time: This might probably work. We are also very practical and start dividing tasks and themes in a very natural way.*
- *Tuesday morning: feelings of uneasiness we all seem to share. Is this process going to work? Can we do without additional interviews and the 'normal' data collection? Let's give it a chance and try to grasp and develop the idea.*
- *Tuesday afternoon: analytical tools can be really helpful. We did a good SWOT analysis.*
- *Wednesday: we feel more at ease and the PSO system becomes clear to us. In the afternoon some of us sit in learning trajectory groups, which gives a picture of the PSO approach in practice.*
- *Gradually we are less "on top" of our dinner guests. On Monday evening we gave them hardly time to eat. Apparently we were still craving for information at that time, but feeling more at ease at this stage.*
- *Thursday: we plan to leave to the PSO office in The Hague. It feels like a break -out, but fitting remarkably well in the whole closed, but very pleasant set-up. Before departure to The Hague we have to start preparing the workshop. The working environment and the team spirit are very good and complementarity has grown during the week.*
- *Friday: last workshop preparations and goodbye to the energy breaks and the very good food.*

Taking the stick

On the evening of the fourth day, just before the feedback workshop, the peer review met with PSO in The Hague. In this meeting we did not ask about their findings, but did engage in a conversation on their reflections on the process so far. Some quotes from the peer reviewers from that meeting:

- *We felt no need for many more conversations during the week. We could see the law of diminishing returns from interviews setting in by the third day.*
- *Maybe it is also just right we didn't interview more people we were looking for information not just opinion.*
- *Asking more questions would change the mode of operation, the idea behind the chosen form*
- *Being patient and sitting together was also important*
- *Meetings in the evenings were extremely important, this forced us to formulate questions for the new guests who were joining us over diner. We were not just focused on finding answers but also with formulating new questions.*
- *Questions were not to confront, but were open. We think this felt as a relief to the interviewees. Interviews didn't feel like the inquisition*
- *5 peer reviewers was perfect, you need enough critical mass in a group, but 7 would have been to much, an even number might have caused tension as it can create blocks*
- *Using the SWOT was temporally valuable, especially as we kept revisiting it, it was not set in stone, normally it easily does*

The Feedback Workshop
Preparing the workshop: From the beginning we planned that we would discuss the format of the feedback with the reviewers and that we would anxiously await their opinions with all the other interested parties on Friday afternoon. We had sent out invitations to all our members, staff, Executive Board, donors and the external consultants with whom we were working or had worked with in the past year.

Our motivation to do this was based on two strategic motives: the first was that in order to canvas support for this method a diverse audience would carry the experiment further, even if this experiment blew up in our face. The second motive was that we wanted to demonstrate that openness is an essential feature of civil society development. The response to our invitation showed that the audience would be sufficiently varied, although the number of members was less than we hoped for. We had not planned for nor expected that the reviewers themselves would take the lead in this afternoon. They accepted the venue and the presence of a cartoonist who made cartoons during the afternoon, one of the methods we have developed in the past years.

> *Bruce: Preparing for the workshop focused our thinking in a positive way. We were all keen to ensure that the structure of the workshop was consistent with the spirit of the peer review. We wanted to make the presentations as dynamic as possible and to avoid PowerPoint at all costs. We also wanted to create opportunities for dialogue with participants and to get across our positive feelings about the peer review process. PSO's choice of venue in Utrecht was inspired. The team prepared a series of individual but linked presentations and there was time for small-group discussions during which some very challenging issues were raised.*

Running the workshop
> *Anneke: The workshop in Utrecht:*
> - *Interesting room for the workshop, but with a terribly conventional table arrangement. Fortunately, we were prepared for that and rearrange the room completely.*
> - *A good turnout from people with different backgrounds promises good discussions.*
> - *The workshop is very interesting. Lively debates. Active interaction. Great cartoons. Everything seems to be in place.*
> - *Final team discussion: internal evaluation of our process and basic agreements on the report.*

> *Bruce: Throughout the workshop, the artist Auke Herrema drew and posted up a series of very incisive and amusing cartoons […]. Perhaps the most interesting aspect of the use of cartoons was the constant reminder about the essentially judgmental nature of the process. The cartoonist reminded us that no matter how much we might try to get away from appearing to make judgments, the reality is that even a peer review process where the reviewers are genuinely striving to be 'critical friends' requires a genuine engagement with the process of evaluation. However, for me what made the peer review process profoundly different from other reviews was that the main purpose was to achieve a deep understanding of PSO that could be used as a platform for learning.*

In one of the session during the workshop, workshop participants were invited to make suggestions both on the process of the peer review and on the content. Some of these were…

° This team should come again after one year and reflect on developments since you left
° The peers have been learning a lot, how to make PSO learn as much as well from the exercise?
° Have a 'fish bowl' conversation with the PSO bureau on the inside of the fish bowl on the value of the peer review for them
° We could develop this peer review as a way of learning about our own (member) organisation and partner organisations
° Continually discuss in PSO the observations and suggestions of the peer review and decide which we

are going to follow-up and how.
° Have a common reflection of the review team and PSO on the peer review methodology
° Look for reflections on other peer review processes, and make these available to others
° Use peer review to start a discussion with member organisations about the kind of individual learning and work trajectories they would like to pursue
° Prepare priority setting of actions following from this peer review for PSO's Annual General Meeting
° Document not only the results, but also the process of peer review
° Discuss outcomes of the peer review with DGIS (both content and method)
° Have member organisations comment on results
° Challenge DGIS by developing a learning based M&E system, if necessary at first parallel to what exists now

Compiling the report: After the workshop the peer reviewers compiled a report in which the different contributions were combined to one accessible document, in which the workshop cartoons were integrated. We had initiated an e-platform for the peer reviewers to share their drafts and commonly work on the document, this platform was not used much in practice. E-mail served as the main means of communication.

Anneke: What a pity that you cannot keep the same intensity over the e-mail although the spirit feels very much alive.[…] We agreed to write our report parts according to the division of tasks agreed upon and the presentation we made in the workshop.

Bruce: In my view it is impossible to distil the understanding, analysis and insights of one week into a three hour workshop and a short report – valuable though it is to try. An important part of the value of a peer review is, I now believe, in the development of caring relationships between the reviewers and the organisation. As a peer reviewer it now matters to me what happens with PSO and its members and partners. […] I hope that PSO will continue to benefit from the relationships it has developed with the peer reviewers by drawing not only on whatever expertise we can offer but equally on the meaningful connection that going through a peer review has generated.

Reflections, surprises and conclusions

In this section we present our reflections on our design principles, the surprises or unexpected results that emerged from the peer review. We revisit our own design and working principles and further lessons learnt.

Adhere to your own design principles
From the beginning we envisaged an open process within the review. We realized and presented the experimental design of the ´pressure cooker´ to the invited peers, director and board. We sought to achieve internal synchronization through wide discussion on the aims of the Peer Review and the formulation of the ToR. We were not as successful as expected in achieving this within the organisation. Unfamiliarity with the method and the unpredictability of the results appeared as motives for a guarded and somewhat reluctant attitude at first. Such reactions are only to be expected, they show differences in motive, position and perceived responsibility. We do not believe that this can be avoided. Other informal pressures to load and hence predetermine the direction of the review process were resisted by referring to the design principles of: selection of peers; transparency: openness and flexibility.

Our engagement in several explanatory telephone conversations for the selection of peers occasionally led to further fine-tuning of the TOR, (the process design) and generally strengthened our confidence that we were on the right track.

Use the experiment for your own (internal) learning
Our own reflections showed that it turned out to be very helpful to discuss our understanding of the design

principles, not just with the peer review team or in the organisation, but also in the team that originally designed the ToR for the process. In hindsight it could well be worthwhile to make our main design principles explicit earlier. The design principles articulated in this article have already been applied in a second peer review exercise, currently underway for humanitarian assistance. The process design differs, it involves the collection of field data, active involvement of southern organisations, exchange visits and the process is spread over more time. Nevertheless our design principles have been used in fine tuning this design[i.] This shows our secondary objective of stimulating the use of peer review methods is being met.

Select your peer reviewers
The selection of peer reviewers was obviously crucial for this experiment to be successful. The development of a gross list of names related to expertise and proven capacity involved engaging with a variety of internal and external people is really helpful. Getting a feeling of the kind of the capacities and working style of peer reviewers is important. A truly excited reaction to the first idea of this experiment, a willingness to engage, the quality of questions in the explorative state and a feeling for the working/communication style of the possible peer reviewers proved crucial.

Plan for Synchronization
We had hoped that the peer review would replace or combine well with the envisaged meta-analysis of PSO evaluation reports. This was unsuccessful, on reflection we realize that this might have been good fortune as the two processes are fundamentally different and involve different perspectives. They are supportive of each other. A reoccurrence of the exercise would allow for improved synchronization with other strategic activities, such as the International Advisory Board and would possibly assist in further articulation of improved evaluation methods.

Synchronization with the learning activity that was taking place (by coincidence at the same location as the peer review) was less successful than envisaged. Peer reviewers indicated that it might have been more valuable to sit and listen. Although the session was enlightening it was also frustrating. As Bruce wrote 'I started making a speech, this changed the dynamics'.

Increase value by repeating of peer review
It seems obvious that this form of condensed peer review would benefit from a reoccurrence over time, as there would be the opportunity to check and revisit impressions, assumptions and conclusions. Without such a reoccurrence this peer review can be an incident. The internal learning dimension probably requires this revisiting and repeated exploration. A repeat would obviously involve the post review 'follow on' activities and choices, such a possibility inevitably involves a degree of checking and revisiting progress and would capitalise on the generated interest and concern for PSO amongst the peer reviewers.

Stimulate input from member organisations
Well before the peer review week we sent out invitations to all our members and staff to give them an opportunity to engage in a dinner and evening discussion with the review team. The location of the review was central within walking distance from a railway station. Our colleagues responded favourably, the response from the member organisations was disappointing as only a two head of organisations were willing to attend. The lesson that we learnt from this is that we should invite others than heads of organisations, and possibly engage earlier and more actively with our members.

As PSO is a member organisation and financing of capacity building involves working with Southern partners, more effective involvement of members would enrich the data available, besides the emphasis placed on written documentation. Face to face engagement with members would provide further factual information, show in what way members discuss their experience with capacity building and focus on the relational dimension of PSO and its members. A second benefit of involvement of members would also be a sense of shared responsibility for the uptake of the conclusions and recommendations.

As stated by Bruce a two and half hour feedback meeting can not capture the richness of the findings of the peer review. Their report confirms this as the implications of incisive observations made are a rich source for reflection and rethinking, for example the conclusions on the use of the conceptual framework on capacity building (Sadiqa), or the transformation towards a knowledge intensive organisation (Bruce).

Can a peer review substitute for an evaluation in future?
At several occasions the question was articulated if an external peer review can substitute for an evaluation.

> *Tony: The peer review […] offered an opportunity to help PSO stand back and reflect on its wider mission and strategy. That was probably its most useful contribution. It did not substitute for neither a formal strategic planning process nor evaluation, but complemented these. That said, in the future, the process could possibly be more closely aligned with such processes, thus serving as a first step in an on-going strategic planning process or alternatively, as an element of a more formal evaluation process.*

> *Anneke: In my opinion there is no clear yes or no to this question: it all depends on the purpose. The peer review is a valuable learning instrument, but it is less valuable as an accountability instrument. Of course, accountability issues in development cooperation might be overemphasized. Nevertheless, PSO itself is struggling with the issue of accountability as shown in its monitoring and evaluation practice (see chapter 5 of the peer review report) and it is good to be aware of the tensions between accountability and learning. The report writing on the peer review made clear to me that different criteria should be applied to evaluation and peer review reports. From an accountability perspective our peer review report lacks evidence, but this is not the criterion that should be applied, because it has a different purpose.*
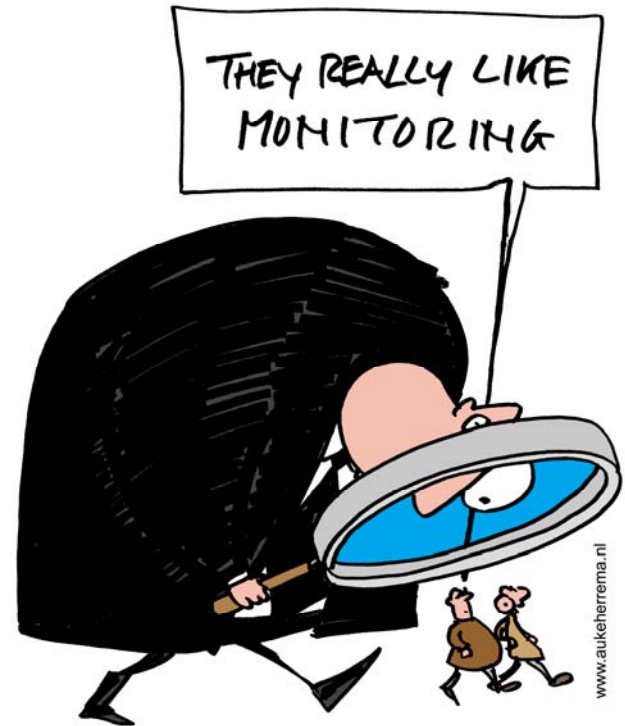
> *What became clear during the week is that an evaluation starting from an accountability perspective does not easily lead to learning in the organisations that are object of the evaluation. Despite all good intentions of the evaluators there is a large gap between accountability and learning. Therefore, a critical evaluation report is definitely not an ideal learning tool. You can learn from the "stick", but the "carrot" should not be forgotten. Moreover, in evaluations you have to look for evidence, which goes together with a (often too hasty) search for information. Given the time and budget limitations of evaluations, often not enough time is spent to really understand the evaluation object, in this case the PSO system. It is my belief that lessons from this peer review can be valuable for the ordinary evaluation process: spend mote time on understanding the organisation(s), the system, the interactions, before going out in the field.*

> *The quest for accountability has led to an enormous evaluation and monitoring fatigue (which is by the way beautifully reflected in two cartoons made during the workshop), which is definitely not leading to better performing organisations let alone to learning. However, peer reviews just as other advisory processes have their limitations and this should also be kept in mind.*

Emphasize mutual learning

The peer review process turned out to be a very enriching experience for the consultants involved. In their practice they seldom get an opportunity like this to reflect, share and work with other senior consultants with different backgrounds from all over the world. Mostly they are always so involved in meeting deadlines. We had not fully foreseen this value for peer reviewers. Where our starting point was recruiting them for a (special) piece of work, they saw the peer review also as an honour and a learning experience for themselves.

> Bruce: *During the peer review I learned a huge amount from my fellow peer-reviewers about how to analyse and understand organisations from different perspectives and I feel privileged to have worked with them. Working together as a team has generated deep and respectful relationships that I hope will be sustained for a long time to come.*

> Sadiqa: *I do not want to undermine the intensity of five extremely enjoyable and mentally exhaustive days by using the cliché of learning experience. It was much more than this. It was an exercise in building professional relationships, respecting each other's views, working together and at the end of the day creating synergy.*

Anneke: *Hence, the whole peer review process allowed me to better understand some fundamental dilemmas of my profession. Dilemmas we have to deal with.*

For PSO it was important to hear from the Peer Reviewers that they appreciate the role and intended contribution that PSO wants to make towards capacity building through a growing variety of member organisations. They specifically point to the potential contribution of the new funding mechanism that allows for the development of a tailor made and demand driven combination of learning from and financing of capacity building practice. The analysis of the capacity building framework suggests that the design of financing and learning as adopted in the new funding period appears more appropriate then the earlier approach.

The significance of the framework of capacity building is considered to be useful, especially if this framework is actively used to discuss and identify needs and interventions of Southern partner organisations. The design and results of the learning trajectories as developed by the Knowledge Centre, including the methods used are potentially of value for others working on capacity building and organisational learning and development. This form of outside recognition is appreciated and motivating as it confirms choices made in the past regarding people, means and approach of the Knowledge and Learning centre.

Concerns are raised regarding the adopted M & E design and methodology, the competency required to avoid that the current framework and design are not turned into an administrative burden is queried. This appears due to the desire to combine accountability (to a back donor) and learning effectively. Such a combination is difficult to achieve in the current arrangements in the development sector. The review is not based on primary field data collected in the South on the practice of capacity building as supported by PSO, for that very important dimension the peer review should be read in combination with other reviews and documentation that does draw on direct field data.

Any form of review makes a choice for a direction of primary analysis. The desired or intended direction or framework is often determined before hand. In this review, the choice of analysis is emergent and based on the professional experience and bias of the individual peer reviewers. This emergent nature of the analysis is intended, as the open process design suggests. This design requires trusting the professional experience and interest of the reviewers. This is in line with a familiar learning principle of 'following your own personal strength and interest. The framework of analysis was a systems approach in which PSO is situated. This approach shows the interdependency of relations and identifies power dynamics that PSO is increasingly aware of. Like the earlier IAB-review the reviewers point towards the importance of establishing and maintaining

dynamic working relations with the member organisations. This peer review follows an experimental design of inviting five unknown peers in a joint review without a team leader demands that professional curiosity and openness are essential attitudes. Selection and combination of professional interest, experience and attitude requires a tailor made solution. Personal references from third parties on background, experience and attitude are essential.

The findings from the peer review together with those from the International Advisory Board form the basis for further reflection and action by PSO as an association. A good next step in this process is formed by a workshop with member organisations in October 2007.

The Peer review lived up to its expected goals: Besides an informed integrated external reflection on where PSO comes from, where it stands and where it is going, relating it to our context and global trends and discussions in this context. The review and the peer reviewer reflections encouraged us to think on how to benefit from our experiment.

Famous last words…
> *Bruce: The peer review process was a bold experiment by PSO and one that is consistent with the creative approach the organisation takes to individual and organisational learning. I feel privileged to have played a part in the experiment and I congratulate PSO on their enterprising initiative and their willingness to truly 'trust the process'…. 'Reflecting on the experience, I am most struck by the trust placed by PSO in the peer reviewers to examine their organisation and to provide feedback in an open workshop setting. In my experience, this degree of transparency and openness is rare in organisations because it involves risk'.*

> *Anneke: The end of a very intensive, interesting, challenging week: I have indeed learned a lot!*

> *Davine: Overall I have found the approach PSO has taken, through Russell and Bram, extremely exciting and challenging. I admire their boldness and risk-taking in proposing and driving a process such as this. They had no idea if it would "work". I don't know now if they believe that it did! However, I thank you both for this opportunity to work in this way, with your very special and complex organisation, and with a very inspiring and fun team.*

> *Sadiqa: I thank PSO and my peer group for making it a wonderful experience. Early spring, occasional flurries and rain, lake view from the meeting place, organic food, courtesies of hotel staff, ducks, flowers, bikes – all made it unforgettable.*

AUTORS

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NOTES

(1) At the time of writing this article the use of peer review is being explored from different perspectives among the Dutch development community. For example Wageningen University, Warchild, the Netherlands Red Cross, ICCO, Oxfam Novib, Cordaid and PSO are currently developing a joint initiative that involves a peer review dynamic of partnership in humanitarian practice

(2) PSO is a Dutch association of 50 member organisations that work on international development and share a focus on capacity building. www.pso.nl

(3) http://www.senseaboutscience.org/peerreview

(4) Terms of Reference PSO Peer Review, March 2007

(5) Terms of Reference PSO Peer Review, March 2007. One of the peer reviewers suggested changing the term Terms of Reference in Suggested Process Guide.

(6) In the same period PSO commissioned a meta-evaluation of MTRs and evaluations of PSO supported Programmes in the South.

(7) Terms of Reference PSO Peer Review, March 2007