

Informal Self-Evaluation at the IMF

As part of the broader evaluation, the IEO examined informal self-evaluation practices and activities at the IMF.¹ The term “informal self-evaluation” is used to describe processes and outputs that were not mandated by or formally shared with the Board.

The IEO found that a substantial amount of informal self-evaluation took place at the IMF. Practices within and across departments varied widely and spanned a broad range of activities, such as Staff or Management-initiated working groups, task forces or communities of practice discussions; post-concluding Article IV surveillance or program mission debriefings; meetings to discuss the effectiveness of activities; retreats; one-off Staff-to-Staff conversations; and efforts to seek input from external stakeholders. Informal self-evaluation covered a diversity of policy issues and operational topics, such as exchange rates, capital flows, small island states, and knowledge management.

Informal self-evaluation most often occurred at the division and team level where it was widespread, according to interviews with a random sample of mid-level Staff. This was corroborated by the IEO survey of IMF staff for this evaluation, in which nearly 60 percent of respondents reported that they had “frequently” or “occasionally” engaged in division- or team-level informal self-evaluation. The survey also found that senior Staff (B-level) and those at the IMF for more than five years had participated in informal self-evaluation at a higher rate than relatively junior and less experienced Staff.

Some post-activity team discussions took place in nearly all area and functional departments. Interviewees cited examples of such discussions following lending program, Article IV, and Financial Sector Assessment

Program missions; following the production of flagship reports (*Fiscal Monitor*, *Global Financial Stability Report*, and the *World Economic Outlook*); and following World Economic and Market Developments presentations.

Some departments reported broader efforts to reflect on experience across their work program and to draw lessons for future work. Examples included seminars and stock-taking exercises that sought to learn from successes and failures; more established or ongoing arrangements, such as weekly meetings; and consultative advisory groups and study groups.

Some departments also sought outside perspectives on their work. In particular, periodic assessments by external experts were commissioned to assess the accuracy of *WEO* forecasts. Other examples included maintaining an external advisory group and contracting survey firms to gauge opinions about IMF work. Staff from a number of departments noted that they sought feedback from authorities, whether during missions, at IMF Spring and Annual Meetings, or through systematic or ad hoc surveys. One department reported drawing on IEO evaluation reports to identify lessons for Staff. The IMF also held a series of regional conferences to discuss lessons of experience in country programs that could be helpful for the broader work of the IMF (Reykjavík, 2011; Riga, 2012; and Dublin, 2014).

Informal self-evaluation activities contributed to learning. Nearly all interviewees believed that these activities had been useful in their own work, had contributed to improving processes and outcomes, and had enhanced learning. Only a handful believed that these activities were not worthwhile; some pointed out that their outcomes depended on individual or team personalities. A number of interviewees noted that they independently sought out prior lessons-focused outputs when rotating into a new position; others described personal interactions with colleagues as opportunities to consider lessons learned from past work. Several Staff emphasized, however, that the potential for informal learning from experienced Staff had been greatly

¹Evidence was gathered from the IEO survey of IMF staff conducted for the evaluation; interviews with the heads of all functional departments covered by the evaluation and with a random sample of A13–A15 mid-level Staff; and internal information repositories and departmental and IMF-wide Intranet sites.

reduced as a result of the 2008–09 IMF “downsizing” exercise. Interviewees from several departments pointed at efforts to disseminate lessons from informal self-evaluation among teams and, to a lesser extent, within departments.

Working groups shared lessons with Management or senior Staff through reports and working papers, as well as IMF-wide through posting internal website articles. Many interviewees noted, however, the inherent limitations to disseminate lessons from informal self-evaluation.

Overall, interviewees believed that there is scope for better integration of informal self-evaluation lessons in the work of the institution. In particular, many highlighted that more consistent practices of documenting lessons from missions would be useful, as this could benefit successor teams and others within and beyond the department. They considered this particularly important now that the practice of preparing detailed meeting minutes during missions has been discontinued.