

Organizational Peer Review

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SUMMARY

An Organizational Peer Review (OPR) provides a thorough review and analysis of an architecture firm's operations. Conducted by highly qualified architects and engineers, an OPR follows a very detailed process to assess a firm's policies, procedures, and their implementation. It is not a benchmarking tool. Costs of an OPR vary by the size of a firm and may be reimbursed by some liability insurers.

WHAT IT IS

Organizational Peer Review (OPR), a joint program of the AIA and the American Council of Engineering Companies (ACEC), is an objective, confidential review of your firm's policies and procedures and their implementation. An OPR examines your firm's operations in seven major categories:

- General management
- Human resources and professional development
- Project management
- Quality management
- Computer systems management
- Financial management
- Business development

During an OPR, every effort is made to develop a comprehensive picture of the firm's operations. If possible, every employee is interviewed, from the CEO to the mailroom clerk. All information shared is held in the strictest confidence. Individual comments and their sources are never revealed. The information gathered by peer reviewers is presented orally to the firm leadership in summary form, and all notes and any other written records of the peer reviewers are destroyed upon completion of the OPR.

WHAT IT IS NOT

OPR is not an evaluation of your firm against national or regional standards or a benchmarking tool.

YOUR PEERS

Highly qualified peers conduct OPRs. To become a peer reviewer, one must have at least 15 years of experience in architecture or engineering, at least five of which must be in a position of major management responsibility. Most, but not all, peer reviewers are registered architects or engineers (A/E firm accountants are also valuable peer reviewers). To qualify, peer reviewers also must complete a day-long training session, and the peer reviewer's firm must undergo an OPR. New peer reviewers can become team leaders only after performing several OPRs under the leadership of experienced reviewers.

COST

The cost of an OPR depends on the size of the firm, which in turn determines the number of reviewers needed and the length of their visit. An OPR of a firm with 16 to 25 full-time employees would require two reviewers for two days, at an estimated cost of \$4,000 to \$6,000. A firm of 51 to 70 employees would require three reviewers for three days, at an estimated cost of \$7,500 to \$9,000. The cost of an OPR includes reimbursement of the reviewers' travel and lodging expenses, a small honorarium for each reviewer, and a small fee to cover administrative costs. (2005 prices mentioned)

LIABILITY INSURANCE SAVINGS

Ask your insurer about full or partial reimbursement of the costs of OPR or loss prevention credits (discounts) on future insurance premiums for completing an OPR.

THE OPR PROCESS AT A GLANCE

ACEC provides the secretariat function in support of OPR. Sources of additional information about OPR are listed at the end of this article. The following steps summarize the OPR process:

- The firm desiring to undergo OPR contacts ACEC to request an OPR registration form.
- The firm completes and returns the registration form and a nonrefundable \$100 registration fee.
- ACEC sends the firm a Reviewer & Date Selection Form; the brochure, "Preparing for Your Peer Review"; and a short list of team leaders selected to match the firm's discipline(s) and size.
- The firm reviews the list of team leaders, selects several candidates, and selects possible review dates.
- From the firm's short list, ACEC identifies a team leader who is available on the preferred dates.
- ACEC or the team leader contacts the firm principal to discuss and establish criteria for the OPR team members and to confirm review dates.
- ACEC or the team leader identifies peer reviewers who meet the firm's criteria who are available on the dates agreed upon; a list of these reviewers is sent to the firm for approval.
- The firm approves the members of the review team.
- ACEC sends the firm and the reviewers a confirmation letter; it also sends the firm an invoice for the estimated cost and a video about the OPR process to share with staff.
- Peer reviewers execute and return to ACEC and the firm a legally binding promise of confidentiality regarding all matters pertaining to the peer review.
- The firm informs staff of the upcoming review, gives the staff an opportunity to view the video, and asks all staff members to complete and mail copies of an advance questionnaire to each peer reviewer.
- Peer reviewers make their travel arrangements.
- The firm makes hotel reservations for all peer reviewers and notifies reviewers of the arrangements (the reviewers pay lodging costs).
- The firm sends copies of the firm's advance materials to each peer reviewer at least 30 days before the scheduled review (new documents are *not* to be created).
- The team leader discusses the upcoming review with team members and assigns review areas.
- No later than 30 days before the scheduled review, the firm pays the invoice for the estimated cost.
- The firm designates a staff member as the primary point of contact for the review team during its visit.
- The firm principals and the review team meet the evening before, or the morning of, the first day of the review.
- The reviewers interview each staff member for approximately 20 minutes each.
- The firm principals meet with the reviewers, who provide an oral summary report highlighting strengths and challenges and present the firm with an Exit Conference Kit.
- The firm principals complete and return to ACEC a Post-Review Questionnaire.
- The peer reviewers forward completed reimbursement forms and receipts to ACEC.
- The team leader forwards an evaluation form to ACEC.
- ACEC reimburses reviewers and forwards to the firm a credit or final invoice for any difference between the estimated cost and the actual cost.
- The firm pays the final invoice or receives the credit.
- The firm may order from ACEC certificates of completion, plaques, and a press release.
- ACEC sends to the firm the requested certificates, plaques, and press release.

TO SCHEDULE A PEER REVIEW

Contact: Peer Review Program Coordinator
 American Council of Engineering Companies
 1015 15th Street, NW, Suite 802
 Washington, DC 20005
 202-347-7474 (phone)

RESOURCES

More Best Practices

The following AIA Best Practices provide additional information related to this topic:

- 04.03.02 Firms Benefit when They Charrette with Design Students
- 04.02.03 Mentoring as a Team Sport

For More Information on This Topic

See "Firm Peer Review," by David Hoffman, FAIA, *The Architect's Handbook of Professional Practice*, 13th edition, page 109.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



Feedback

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Keywords

- Practice
- Business planning
- Quality control programs
- Peer review