



# PEER REVIEW USER'S GUIDE

## Foreword

*Engineering News-Record* lauded GBA's **Peer Review** (per their featured article, October 1999) as one of the 125 most innovative construction industry developments of the prior 125 years. **Peer Review** was the only association concept so honored. That would have been an extraordinary laurel for most associations; something to hang their hats on.

Inherent to **Peer Review** is awareness that it is a cyclical process for continuous improvement. Firms that have undergone several Reviews may elect to use a focused, or streamlined **Peer Review**. Larger firms with an internal Review process may only need an occasional external check. Smaller firms do not necessarily need all the policies and procedures large firms do. In other words, **Peer Review** is flexible, and, for that reason, each Review should begin with a mutual scope development session. Through it, a firm's CEO and the **Peer Review** Team Captain can design the **Peer Review** best-suited to the needs of the firm.

We owe a debt of gratitude to the American Institute of Certified Public Accountants, which willingly shared its materials and experience to help GBA initiate **Peer Review**. We also acknowledge the many members of GBA who have contributed over the years, as members of committees that have nurtured and implemented the process, and as Reviewers. The long-time support of Terra Insurance Company merits special praise. Terra has been a **Peer Review** "believer" since "day one," and has consistently "walked the walk." To Terra, once again, our heartfelt thanks.

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## Introduction

Lauded as one of the construction industry's most innovative developments of the past 125 years, GBA's **Peer Review** is a genuinely unique service designed to help GBA Member Firms improve their business practices, internal and external communications, and overall risk management.

A Comprehensive **Peer Review** comprises an objective assessment of a firm's nine core management components (CMCs) by a **Peer Review** Team of (typically) two or more principals of GBA Member Firms. Through remote surveys and interviews, among other means, Reviewers gauge how well the firm's policies and procedures are understood, and how effectively staff applies them. The Review Team concludes its work by reporting its findings and recommendations to the CEO and others the CEO may designate. The oral report is almost always supplemented by a written report.

At one time, the Comprehensive **Peer Review** was the only **Peer Review** option available. By contrast, today's **Peer Review** is so flexible, each Review should include a mutual scope-development session so that the CEO and the **Peer Review** Team Captain can structure a process to meet the CEO's specific needs and preferences. Also, in the past, the **Peer Review** required an on-site visit. Now, the entire **Peer Review** can be completed virtually.

Note that **Peer Review** is a "come-as-you-are" activity. The Reviewers are engaged to evaluate the effectiveness of existing policies and procedures, not to "bless" a firm because it has all its paperwork in place. If a firm has not prepared one document or another, all that's needed is a memo explaining the policy or procedure involved. Through interviews and other means, Reviewers will determine how well written and unwritten policies and procedures are understood and followed, and the extent to which modifications may be worthwhile.

Although the cost of **Peer Review** is far less than that of outside management consultants, CEOs who have relied on both have said that **Peer Review** provides superior results. Because the **Peer Review** Team comprises successful professionals who are experienced with the challenges of operating similar firms, they can come "up to speed" quickly, to provide immediate value.

## Getting Started

For **Peer Review** to be effective, you (The person in charge) must be committed to making it work. Do not pursue **Peer Review** with a casual attitude. Understand how it differs from other programs (see Appendix A). Speak with the CEOs of other firms that have gone through the process. Remember: **Peer Review** is the only effective means for substantiating a belief that a firm is as good as it can possibly be, and verifying that staff and clients agree.

Once you decide to move forward, complete an application (see Appendix B) and submit it to GBA. GBA will issue a control number for your Peer Review and provide you with preliminary information for the process.

The vitally important next step: Select an appropriate Team Captain from the list posted on GBA's website. Even if you know some of those listed, you would be well advised to discuss Team Captain selection with the CEOs of Peer Reviewed firms.

Contact the Team Captain candidates you are interested in. Discuss your needs and goals with each. Request information about their background, relevant experience, interest, and availability (Refer to Appendix C for suggested interview questions). Does the Team Captain have the background and experience necessary to evaluate your firm? To what extent will you be able to confide in them? Once you select your Team Captain, arrange for a mutual scope-development session. If additional team members are needed, work with the Team Captain to select other members of the Review Team.

While flexibility is an important attribute of GBA's *Peer Review*, most well-established firms that have not previously participated in the process opt for a Comprehensive *Peer Review* for at least the first and second times. The first Review yields insightful opinions about the completeness of the firm's policies and procedures, the effectiveness with which management communicates them, and the diligence with which staff implements them. The second Review, usually conducted about four or five years later, and often by different Peer Reviewers, helps determine the efficacy of any changes made.

A Comprehensive *Peer Review* evaluates all nine core management components (CMCs) described in Appendix F:

- Business Management,
- Facilities and Technical Resources,
- Human Resources Management,
- Professional Development,
- Project Management,
- Financial Management,
- Marketing Practices,
- Electronic Resources Management, and
- Image and culture.

Some firms have found that "Peer Review Lite" is a valuable tool for focusing on just a few or just a single issue that some of their peers have already encountered. This approach is used by firms that are relatively small and still getting established in their marketplace or by firms of any size that desire input in just one primary area of business. This approach generally requires less preparation than a Comprehensive *Peer Review*. Contact GBA for more details.

The *Peer Review* scope that you and the Team Captain develop should indicate, as a minimum:

1. CMCs to be reviewed;
2. CMCs to be emphasized;
3. specific operational problems to be considered;
4. the documentation required and materials to be issued to Review Team members before on-site review (see Appendix F);
5. selection of the client and staff questionnaires, including questions in addition to the standard *Peer Review* questions;
6. offices to be Reviewed;

7. number of additional Reviewers needed and their qualifications;
8. schedule for the Review; and
9. budget.

Once committed to writing and approved by both the CEO and Team Captain, the **Peer Review** scope becomes a road map for the process, permitting the CEO and Team Captain to collaborate in the selection of other Reviewers.

## On-Site Review Option

On-site Review, or “visitation,” may take from one to three days (or more) depending on the number of offices involved and their size. The CEO and Team Captain should discuss the schedule of activities in advance, as well as the Team’s need for office facilities and logistical support while on site, hotel reservations, and interoffice travel (when a multiple-office Review is involved). Advanced scheduling of staff interviews is particularly important, in order to reduce the interviews’ impact on normal operations. In smaller firms, as many as half the staff or more may be interviewed. When staff exceeds 100, at least 20 to 25 should be interviewed.

The on-site Review culminates with the Review Team providing an oral report to the CEO and others the CEO selects. When sensitive issues are involved, the CEO customarily meets with the Review Team privately before the Team delivers its oral report. The oral report encourages dialogue. If it can be arranged, a dinner following the oral report provides an excellent opportunity for continued discussion under more relaxed conditions.

The written report, although optional, is almost always requested. Compared to an oral report, a written report permits the Review Team to coalesce its observations and communicate its recommendations far more effectively. The written report should be prepared within the agreed-upon schedule (normally within 30 days) and, 30 days after the report is submitted, the Review is complete. Nonetheless, Review Team members usually are amenable to subsequent contact, to clarify or amplify. Note that the written report could be subject to discovery during a lawsuit. Thirty days after you receive your final report, your copy of the report will be the only copy in existence. How long you keep the report is up to you. After receiving the final report, the CEO of the Reviewed firm should complete the “CEO Critique of Review Team” form (Appendix H) and mail it to GBA headquarters.

## Virtual Review Option

If the virtual interview option is selected, on-site logistics are deleted. Virtual interviews are performed using Zoom, MS Teams, or similar platforms. The interviews are scheduled after completion of the staff and client questionnaires, and after review of the firm’s documents. The interviews are normally scheduled over a period of several weeks in order to avoid scheduling issues, and to allow plenty of time between interviews to review critical issues. This interview questioning is similar to on-site interviews.

For the virtual Review, the exit conference is normally completed after submittal of a draft written report, and after the firm’s documents with Peer Reviewer’s comments are returned. This allows the firm some time to review the written feedback prior to the virtual exit conference so that the firm can generate questions for discussion. In some cases, the Peer Review team can bring outside specialists to a portion of the exit conference if their presence can help address specific issues.

## Continuing the Process

Firms use the information gained from *Peer Review* to develop plans for improvement, usually incorporating recommendations of the *Peer Review* Team. The *Peer Review* report provides a good checklist or reminder of those items the firm should be working on. With time, the *Peer Review* report will become “stale,” which is why many firms undergo *Peer Review* every four to five years, to assess general or specific operational effectiveness and adjust procedures as a result of changes in firm size, geographic spread, key management staff, or other significant factors.

## Equivalency Review for Internal Review Programs

A number of larger firms with multiple offices have established their own versions of GBA's *Peer Review* as an internal procedure, in order to:

- improve internal communications,
- share ideas between offices,
- detect practices that may lead to risk or liability concerns, and
- give staff an opportunity for confidential input to management.

Although internal programs produce many benefits, they commonly have several weaknesses compared to the GBA *Peer Review*, because:

- the corporate office is not usually reviewed,
- communication issues between the corporate office and branches commonly go unaddressed, and
- those who conduct the reviews generally do not have the perspective of peers who practice in different firms in different parts of the country.

A GBA “Equivalency Peer Review” can strengthen an internal program by:

- reviewing the corporate office for conformance with firm policies and procedures,
- monitoring a limited number of internal reviews of branch offices to evaluate their effectiveness,
- evaluating communication between the corporate office and branches, and
- providing a broader perspective on practice issues using Peer Reviewers from outside the firm.

The scope of an Equivalency Peer Review is developed much as a conventional *Peer Review* scope is developed. Scheduling can be more complex, however, because Review Team participation in branch office Reviews may occur over several weeks or months. In that case, the Team Captain or a member of the Review Team may return to the corporate office to provide an oral report after the final branch office visit.

The frequency of Equivalency Reviews depends upon factors such as the results of previous evaluations, changes in firm leadership, and/or acquisition and merger activity. Equivalency Reviews usually are provided about once every five years.

# Ethics, Confidentiality, and Noncompete Considerations

Peer Reviewers should come from firms that operate outside a participating firm's geographic marketing area (GMA) to avoid even the appearance of a conflict of interest.

Any information learned or developed by a Peer Reviewer is confidential. It may not be shared with anyone except other Reviewers on the Team, solely for Review purposes. Trust is the foundation on which Peer Review is based. Reviewers are individually duty-bound to keep confidential information confidential.

Peer Reviewers shall not disclose to any third party or use for personal or business advantage any information gained from or personal opinions formed about the Reviewed firm, including its employees, instruments of professional service, and clientele. For example, after a **Peer Review**, no Peer Reviewers and none of their firms should initiate recruitment of the participating firm's employees or marketing of the participating firm's clients in the participating firm's GMA. A written agreement requiring adherence to these conditions, such as the sample shown in Appendix G, can be executed by each Reviewer if the participating firm's CEO so prefers. Any Reviewer who is unable to commit to these requirements, whether or not in writing, must decline **Peer Review** participation.

## Costs of Peer Review

**Honorarium and Expenses (On-Site Reviews):** Each Team Member receives an honorarium for each day spent on-site, plus an additional one-day honorarium that considers travel to and from the site, as well as various pre- and post-Review activities. The Team Captain receives an honorarium for each day spent on site, plus an additional three-day honorarium that considers travel and the time and talent required to plan and manage the Review and complete the written report that usually is required. The suggested honorarium is \$2,000/day for Team Members with previous **Peer Review** experience, and \$1,500/day honorarium for first-time Reviewers. Peer Reviewers are at liberty to charge a different fee.

The Reviewed firm is responsible for Reviewers' reasonable travel, hotel, and meal expenses. To avoid the carrying costs of these expenses, Reviewers may submit invoices as the expenses are incurred or may request payment of a retainer prior to the site visit.

**Honorarium and Expenses (Virtual Reviews):** Each Team Member receives an honorarium based on the number of virtual interviews. For each 6 virtual interviews, they receive one day of honorarium. They also receive an additional 2 days of honorarium for reviewing Peer Review documents, assisting with the report writing, participating in the exit conference, as well as various other Peer Review activities. The Team Captain receives an additional three-day honorarium for planning and managing the Peer Review.

**GBA Administrative Fee:** A \$500 fee is paid to GBA for administrative process and other related activities. This fee maybe reimbursed by your professional liability insurance.

Your professional liability insurance carrier may subsidize a significant portion of overall Peer Review costs. If your insurer does not do this, talk with its representatives. Your insurer also benefits from your **Peer Review**.

## Other Review, Registration, and Certification Programs

### **American Association for Laboratory Accreditation (A2LA) Programs**

A2LA programs have been developed as review mechanisms for A2LA members to help them evaluate their laboratories for A2LA accreditation. The A2LA program considers:

- organization and management,
- quality system audit and review,
- personnel,
- accommodations and environment,
- equipment and reference materials,
- measurement, traceability, and calibration,
- test methods,
- handling of test items,
- records,
- certificates and reports,
- subcontracting,
- outside support and supplies, and
- complaints.

The methods used to consider these issues are similar to those used for an GBA Peer Review, except A2LA is more technically focused.

**Details:** [www.a2la.org](http://www.a2la.org)

### **International Standards Organization (ISO) 9000 Registrations**

The ISO 9000 series (ISO 9001 through 9004) focuses on defining, developing, and maintaining a quality loop from the time a client's service need is recognized through follow-up with the client and supplier after the service is delivered. ISO 9000 registration indicates that a firm follows consistent communications and documentation protocol through the complete cycle of services to a client, but it does not focus on the quality of service that's delivered. By contrast, Peer Review examines the overall issues associated with effective business operations, leading to findings, conclusions, and recommendations that can help a firm improve.

**Details:** [www.iso.org](http://www.iso.org)

**American Institute of Certified Public Accountants (AICPA) Peer Review Program**

Participation in the AICPA Peer Review Program, on which GBA's is based, is a requirement for continuing AICPA membership. Any deficiencies noted in Peer Review Reports (which are available for other CPAs' review) must be corrected. However, a GBA firm is free to accept or reject any of the recommendations made by the Reviewers recommendations.

APPENDIX B

## Peer Review Application

Firm Name \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_

Name of Peer Review Coordinator  
(Should Be CEO, Senior Principal, or Branch Manager) \_\_\_\_\_

e-Mail Address \_\_\_\_\_

Telephone Number \_\_\_\_\_ Ext. \_\_\_\_\_

Facsimile Number \_\_\_\_\_

Website \_\_\_\_\_

- I need a copy of the Peer Review User's Guide.
- I need help understanding how Peer Review works.
- I need help selecting a Team Captain.

I have scheduled the Peer Review for: \_\_\_\_\_

My Team Captain will be: \_\_\_\_\_

Signed for the Firm: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

*Complete and return to:*

**GBA**

info@geoprofessional.org

Tel.: (301)565-2733

## Team Captain Selection

Begin your interview of a Team Captain candidate by discussing your firm's geographical marketing areas (GMAs) to ensure that your GMAs are remote enough from the candidates to prevent conflicts of interest. Next, provide a thumbnail sketch of your firm (including its size, age, number of offices, and range of technical services), describe your general expectations of **Peer Review**, and indicate when you would like the Review performed.

Assuming no conflict of interest exists, and the candidate is available, gain background information about the candidate by asking questions. Some samples:

1. Tell me about your career.
2. Tell me about your firm (*age, disciplines, size, branch offices, etc.*).
3. What is your role in the firm, especially as it relates to the nine Core Management Components?  
(*Responses usually will suggest other questions that will yield more information about the candidate's experience in those areas that concern you the most.*)
4. How many Review Teams have you served on? How many as Captain?
5. How many times has your firm been Reviewed?
6. What benefits has your firm derived from **Peer Review**?
7. How has participation as a Reviewer benefited you and your firm?
8. Describe the procedure you propose to follow in working with me to develop a Review scope that will address my expectations.
9. Please provide references to at least three CEOs of firms you have Reviewed.

At the end of the conversation, advise the candidate of your schedule for making a selection.

APPENDIX D

## Staff Questionnaire

### Professionalism: Image and Culture

Please rate your recent experience with the firm on a 1 (strongly disagree) to 10 (strongly agree) basis.

	N/A	1	2	3	4	5	6	7	8	9	10
Our firm enhances our profession.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I make a difference here.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our culture supports high-quality work and service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People work extra hard to get a job done.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I respect the firm's leaders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We help our community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We want to be the best.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This firm is unique compared to competitors.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This firm is honest and ethical.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has reasonable expectations of its employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm promotes a work/life balance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This firm is on the cutting edge of technology.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This firm is committed to the environment and sustainability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I enjoy the people I work with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We add value to our clients' projects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management treats staff fairly at all levels.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

**Business Management**

	N/A	1	2	3	4	5	6	7	8	9	10
We have a strategic plan or an annual business plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know our mission and goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm is profit driven.											
The firm wants to grow.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm informed about company matters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a leadership-transition plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have an ownership-transition plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We're serious about loss prevention and risk management.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We're serious about safety.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policies and procedures are clearly defined and understood.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

**Facilities and Technical Resources**

	N/A	1	2	3	4	5	6	7	8	9	10
I have the resources I need to do quality work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our office projects a professional image.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our field staff has current equipment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm is current with maintenance and calibration of lab and field equipment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

**Professional Development**

	N/A	1	2	3	4	5	6	7	8	9	10
I receive appropriate training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am encouraged to participate in professional societies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am encouraged to contribute to the advancement of our profession.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am encouraged to contribute to my community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff receives appropriate training and professional development.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I respect our senior staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm helps our profession.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

**Human Resources**

	N/A	1	2	3	4	5	6	7	8	9	10
The firm treats staff well.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has clearly defined policies and procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm is current with labor laws.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have regular and meaningful performance reviews.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like my boss.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My salary is fair.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My benefits are fair (retirement, medical, vacation, other).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am encouraged to grow professionally.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

**Project Management**

	N/A	1	2	3	4	5	6	7	8	9	10
I know how to set up a project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm keeps excellent project records.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm maintains current project files.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm does well in assigning staff to projects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have excellent professional staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have excellent field staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have excellent office staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We provide excellent designs and recommendations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We provide practical and constructible recommendations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our deliverables look professional.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We make excellent presentations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have credibility with regulatory agencies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are responsive to our clients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are effective with contract negotiations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have good client relationships.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are excellent problem solvers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has effective financial reporting procedures to track project progress and expenses.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has useful and effective QC and QA procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has useful and effective health and safety plans for field work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

### Financial Management

	N/A	1	2	3	4	5	6	7	8	9	10
We are financially strong.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm issues monthly P&L statements to appropriate staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm performs timely and accurate billing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm performs timely collections.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

### Marketing

	N/A	1	2	3	4	5	6	7	8	9	10
I like our website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We use social media.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We state our qualifications honestly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have professional marketing materials.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have an effective marketing plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We know our target clients and markets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have excellent communications with clients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a go/no go form for project pursuits.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have excellent marketing-staff support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

### Electronic Resources Management

	N/A	1	2	3	4	5	6	7	8	9	10
I have the hardware and software I need.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have effective IT support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have appropriate policies for acquisition, maintenance, and use of hardware, software, e-mail, and Internet.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We maintain electronic data files, system security, and back-up procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We subject e-mails to rigorous review.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm incorporates e-mail into project files.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our firm only uses licensed software.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

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**How do you differentiate the firm from its competitors?**

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**What should the firm stop doing?**

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**What should the firm continue doing?**

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**How could the firm be more profitable?**

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**What are the firm's major opportunities?**

---

**Who are the firm's emerging leaders?**

---

**How do you rate your firm's professional loss-prevention record? Why?**

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**Questionnaire Submitted By:**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Office: \_\_\_\_\_

Department: \_\_\_\_\_

**THANK YOU!**

# Client Questionnaire Cover Letter and Questionnaire

## Questionnaire Cover Letter

[Firm letterhead]

[Month, Date, Year]

[Individual's Name]

**[Name of Client Organization]**

[Client Organization Address]

Dear [Title] [Name]:

[Firm Name] is undergoing an GBA *Peer Review* to improve our client service, and we need your feedback. You have been selected because we value our relationship and your feedback. This Peer Review is being performed by leaders in companies similar to ours. One very important step in the process is requesting feedback from our valued clients. The information provided will provide the Peer Reviewer information on our company and our strengths and weaknesses. This information will assist the Peer Reviewer in providing us with valuable recommendations on how we can improve.

Please be assured that your responses will be held in the strictest of confidence unless you want your information shared with us. Indicate your preference on the last page of the questionnaire. If you want your responses kept confidential, only the Peer Reviewer will see your responses, and will use it solely to develop trend data. However, if you agree to share your responses with us, we will be able to follow up on any issues that you may have. We ask that you be completely candid in your answers. If a question does not apply to you, please answer N/A.

A link to the questionnaire will be emailed to you in the near future. We would appreciate if you could fill out your questionnaire no later than **X**. If you can not complete the questionnaire for some reason, please contact me.

On behalf of [Firm name], we thank you in advance for your time and your candid response. If you have any questions or concerns pertaining to this process, please let me know.

Sincerely,

[Firm Name]

[CEO's Name]

[CEO's Title]

cc: [Peer Review Team Captain's Name]

## Client Questionnaire

### Professionalism: Image and Culture

	N/A	1	2	3	4	5	6	7	8	9	10
I'm familiar with this firm.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has an excellent image.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I respect the firm.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I respect the firm's staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm respects me as a client representative.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend this firm to a colleague.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to retain this firm again.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff attends professional meetings and contributes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm contributes to the community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm works well with clients and service providers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

### Business Management

	N/A	1	2	3	4	5	6	7	8	9	10
The firm has excellent leaders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm has excellent management ability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm focuses on safety.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The staff has the resources needed to serve me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

## Client Questionnaire

### Facilities and Technical Resources

	N/A	1	2	3	4	5	6	7	8	9	10
The firm has appropriate field equipment and technical resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm's offices project a professional image.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

### Project Management

	N/A	1	2	3	4	5	6	7	8	9	10
Project managers care about me and my project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project managers appropriately communicate with me and my team.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm assigns appropriate field staff to my projects.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I receive excellent presentations and deliverables.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This firm has credibility with regulatory agencies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm is responsive.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm negotiates fair contracts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deliverables are on time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deliverables are within budget.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

## Client Questionnaire

### Financial Management

	N/A	1	2	3	4	5	6	7	8	9	10
This firm sends invoices in a timely manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm's invoices are accurate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm provides value for its fees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm meets budgets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm responds promptly to invoicing questions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The firm follows FAR rules.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

### Marketing

	N/A	1	2	3	4	5	6	7	8	9	10
I receive personal communication from people I know.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like the firm's marketing material and website.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I see the firm on social media sites.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I receive appropriate marketing communications from the firm.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our staff appropriately asks for additional work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our work product matches our marketing message.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments</b>											

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## Client Questionnaire

**Which office(s) do you work with?**

---

**How many similar/competitive firms have you retained in the past few years?**

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**What are the firm's two or three principal strengths?**

---

**What are the firm's two or three principal weaknesses?**

---

**How could the firm improve its services to you?**

---

**Confidentiality\***

- Share my responses with the firm
- Keep my responses confidential

**Questionnaire Submitted By: (Please provide this information for the Peer Reviewers. If you chose to keep your responses confidential, it will not be shared with the firm.)**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

**THANK YOU!**

## Core Management Components

The GBA outlines the nine Core Management Components (CMCs) below, plus questions to assist in evaluation. When Comprehensive Peer Review is conducted, the Reviewers' report to the CEO could be organized in the order shown below, to provide a more structured and uniform appraisal. Otherwise, the report format should be established ahead of time by the Team Captain and the firm's CEO.

### 1. BUSINESS MANAGEMENT

- **Strategic Planning**

- a. Does the firm have a strategic plan?
- b. When was the strategic plan last updated?
- c. Is the strategic plan supported with an annual business plan that includes specific, measurable, and attainable goals?
- d. Does the firm monitor its strategic plan goals?
- e. Is the firm meeting the goals?
- f. Do employees know the firm's goals?

- **Ownership Structure**

- a. Does the firm have an ownership transition strategy and/or plan?
- b. Are rising stars involved in ownership?

- **Organizational Structure**

- a. Do employees understand the organization structure?
- b. Does the CEO delegate authority?
- c. Do leaders seek open/honest feedback?
- d. Is there a Loss Prevention Coordinator, Health & Safety Officer, EEO Officer, HR Manager, IT Manager?
- e. Does the firm have an Organization Chart?

- **Communications**

- a. Are firm communications between management and personnel adequate?
- b. Does the firm have a policy and procedure manual?
- c. Does the policy and procedure manual address topics of need to the firm?
- d. When was the policy and procedure manual last updated?

- **Ownership Transition**

- a. Does the firm identify and develop new owners?
- b. Does the firm have an ownership transition plan?

- **Leadership Transition**

- a. Does the firm identify and develop new leaders?
- b. Are the new leaders engaged?

- **Response to Past Peer Reviews**

- a. How has the firm responded to the recommendations from past Peer Reviews?

- **Loss Prevention**

- a. Who is responsible for handling loss prevention claims and training?
- b. How are lessons learned from loss experiences communicated within the firm?

## 2. FACILITIES AND TECHNICAL RESOURCES

- a. Does the firm's facility enhance its image?
- b. Are in-house technical resources adequate; e.g., library, laboratory equipment, personal computers, servers, and software?
- c. Are the firm's resources generally current or out-of-date/obsolete?
- d. Does the firm inventory major lab, field, safety, and office equipment?
- e. How does the firm handle and store hazardous materials and specialized geo-environmental equipment?
- f. How does the firm securely store and retrieve historical records?
- g. Do employees receive personal protective equipment?

## 3. HUMAN RESOURCES MANAGEMENT

- **General**

- a. Is there a designated HR manager?
- b. Who hires and fires employees?
- c. Do employees know who they report to?
- d. Does the firm have a formal new-hire initiation process to on-board new employees?

- **Recruitment**

- a. Why would someone want to work here?
- b. Does the firm have a written recruitment procedure?
- c. Does the firm do background checks prior to offer of employment letter?

- **Employment Laws and Regulations**

- a. Does the firm have a Personnel Manual? When was the manual last updated?
- b. Does the personnel manual have a signature page?
- c. Does the firm provide formal health and safety training?
- d. Does the firm have a written health and safety plan?
- e. Does the firm have a medical monitoring program?
- f. Are there Equal Opportunity/Affirmative Action plans?
- g. Does the firm have a substance abuse screening/testing policy?
- h. Does the firm perform formal exit interviews of departing employees?
- i. Who handles former employee inquiries?
- j. Does the firm have a policy prohibiting employees from moonlighting?
- k. How does the firm handle independent contractors?

- **Employee Performance Reviews**

- a. Does the firm conduct regular formal employee reviews? (Do you ask for feedback?)
- b. Does the firm encourage the development of personal career path development plans?
- c. Do you have written disciplinary action notices? Are they current?

- **Personnel Records**

- a. Are employee personnel records stored in a secure location with limited access?
- b. Do personnel files document the employee's progress, training, discipline, registration, etc.?

- **Employee Retention**

- a. How does the firm actively communicate with employees?
- b. Does the firm routinely survey employees to determine their level of engagement?
- c. What is the overall level of morale in the firm?
- d. How does the firm benchmark salary/benefits?
- e. Are there any policies you should implement now?

#### 4. PROFESSIONAL DEVELOPMENT

- **Training**

- a. Is training formal or informal? Internal or external programs?
- b. Does the firm have an annual training budget?
- c. How does the firm encourage active participation in professional organizations and advancing the profession?

- d. How does the firm determine who receives training?
- e. Does the firm maintain records of who received training, the type of training and when the training took place (personnel file)?
- f. Are supervisors encouraged to give junior employees a variety of assignments to help them learn and diversify their capabilities?
- g. Does the firm have a formal mentor program? Does junior staff have access to more experienced staff?
- h. Does the firm discuss ethics or have formal training?
- **Registration/Certification Policies**
  - a. Does the firm encourage employees to become registered/certified?
- **Policies and procedures for implementing GBA and other loss prevention materials and programs.**
  - a. Do employees know where to get GBA and other loss prevention and risk management materials?
  - b. Do appropriate personnel receive GBA training, e.g., , PM training, FOPP, webinars, etc.?

## 5. PROJECT MANAGEMENT

- **Contracts**
  - a. Do projects have a clear scope of services? Do project managers mutually develop scopes with clients?
  - b. Are standard firm contracts available? Are they updated periodically to reflect current law and practice? Are they reviewed by legal counsel?
  - c. Do project managers have written contracts with subs with adequate protection and proof of insurance?
  - d. Do projects have written contracts?
  - e. Who within the firm is responsible for reviewing contracts? Does the firm have a checklist of critical terms? Do project managers have access to legal help if required?
  - f. Who has authority to sign contracts? Does staff know who is authorized to sign contracts?
  - g. Is there a formal procedure for scope/fee changes? Do project managers ask for scope/fee adjustments in a timely manner?
  - h. Does the firm include construction phase services in the proposal scope?
- **Personnel Management**
  - a. Does the firm maintain a list of employees authorized to serve as project managers? Do they receive formal training before assuming the project manager role? Do they know their authority and have a written job description?

- b. Are project managers respected within the firm?
  - c. Does the firm have a formal procedure for assigning personnel to projects?
  - d. Do project managers have access to good project and budget controls?
  - e. Do project managers encourage and teach ethical conduct?
  - f. Do project managers assign certified personnel to perform applicable lab and field tests? Is there a plan to keep appropriate personnel certified?
  - g. Do project managers have responsibility to review and balance employee workloads?
- **Communications**
    - a. Do project managers keep clients informed about schedule/budget progress? Does the firm meet budgets and schedules?
    - b. How do PM's communicate with PE's? Does it work?
    - c. How does the firm handle client/project confidentiality requests?
- **Financial**
    - a. Do project managers have active access to project financial information to adequately track project schedules and budgets?
    - b. Is there a formal project review procedure to identify and handle projects that are over budget and/or behind schedule?
- **Quality**
    - a. Does the firm have a formal Quality Control procedure for technical work and correspondences? Are templates and/or checklists available – with caveats?
    - b. Who has responsibility for reviewing plans, calculations, and reports? Does the quality reviewer co-sign plans, reports and initial calculation reviews?
    - c. Does the firm have report/documentation standards to assure reports are concise, thorough, and written to meet firm standards? Do the reports identify risks and limitations? Do they stay within the scope of services?
- **File Management**
    - a. Does the firm have a project document and file management system? Does the system include a formal file retention/purge policy?
    - b. Does the firm have a formal project file organization structure?
    - c. Does the firm have an effective File retention/archive policy?
    - d. Does the firm have a File Closure policy? Does it discuss what to do with draft reports, rough logs, letters, notes, etc.? What about files with construction services – does the firm combine office and field file documents and keep marked up plans?
    - e. Does the firm have a written policy for filing/archiving electronic project records?

## 6. FINANCIAL MANAGEMENT

### • General

- a. Is the firm profitable enough to achieve firm goals for competitive salary, benefits, ownership transition, and firm investment?
- b. Does the firm prepare monthly or regular financial statements? Who receives the information?
- c. Does the firm prepare an annual budget? Does it include capital, revenue, and overhead projections?
- d. Does the firm use separate offices as profit centers? Does this create problems?
- e. Does the firm have standard, timely billing procedures? Do project managers review drafts?
- f. Does the firm have formal collections policies/procedures? Are project manager's involved in the collections process?
- g. How are the firm's financial records stored and retrieved?
- h. Are owners happy with the quality and frequency of financial information?
- i. Does the firm's financial management software provide timely, accurate, and pertinent information to manage projects and the firm?
- j. Does the firm educate owners about financial issues?
- k. Do project managers have the financial controls they need?
- l. Does the firm monitor and forecast backlog?
- m. Does the firm track and monitor proposal success rates?
- n. Does the firm monitor write-offs? Does the firm have a policy for approving write-offs?

## 7. MARKETING AND SALES

### • Marketing Plan

- a. Do you have target markets? Target clients? Target projects?
- b. Do you have marketing personnel? Do they maintain a web site, social media, blogs, newsletters, etc.? Do you train them? Do you monitor marketing information for language that might oversell the firm and consistency with your culture/ideals?
- c. Do you check with clients/contract language before highlighting a project in a marketing piece?
- d. Do you keep résumés current?
- e. Do you solicit client feedback (surveys, etc.?)

### • Sales Plan

- a. Is the marketing plan consistent with the sales plan? Do sales staff know your target clients, markets, services, and available resources? Do salesmen track target clients and projects over time?

- b. Do professionals sell their own work? Does the firm help them balance selling and doing the work? Are these valuable people adequately rewarded?
- c. Does the firm have professional sales staff? Do they set realistic client expectations? Do you monitor sales volume?
- d. Do sales staff attend professional meetings, give talks, write papers, stay visible, talk to clients?
- e. Does the firm have a Go, No-Go proposal response procedure?
- f. Does the firm track proposal success rates?

#### **8. ELECTRONIC RESOURCES MANAGEMENT**

- a. Are your investments in this area adequate for where your firm is going?
- b. Are you safe from cyber-attack?
- c. Do you have a policy to acquire and maintain hardware and licensed software?
- d. Do you inventory software?
- e. Who's in charge of your IT? Do you support them with budget and staff?
- f. How do you secure and back up files? Do you have limited access for some financial information?
- g. Do you have guidelines for business and personal use of computers, internet, e-mail, etc.? Do you review outgoing e-mail content?

#### **9. IMAGE AND CULTURE**

- a. What are your firm's strengths and weaknesses?
- b. Why is your firm unique?
- c. Are you happy here? Do you contribute?
- d. Are you growing?
- e. What is the firm's culture? Do you like it?
- f. What is the firm's reputation?
- g. Does the firm make the profession better?
- h. Are you proud of the firm?
- i. How does the firm treat employees? How does it treat clients? Others?
- j. Do you trust leadership?
- k. Is the firm honest and ethical?

## Suggested Agreement for Service as a Peer Reviewer

I recognize that **Peer Review** is a singularly important service whose success depends upon the integrity of Peer Reviewers. In return for the professional, educational, and other benefits that service as a Peer Reviewer will bring to me personally, I confirm my awareness of professional **Peer Review** practices and, accordingly, I agree:

- to treat as confidential and not disclose to any third-party information gained or personal opinions formed by me about the participating firm during the course or as a consequence of **Peer Review**, including, without limitation, information or opinions about the firm's policies, methods of operation, instruments of service, employees, clientele, etc.;
- to abstain from the targeted recruitment of employees of the participating firm based upon information gained during **Peer Review**;
- to abstain from marketing the participating firm's clients in the firm's geographic marketing area based upon information gained during **Peer Review**;
- when serving as a **Peer Review** Team Member, to treat as confidential, not disclose or discuss with any third party, and destroy or return to the Team Captain any drafts of the written report and any memory media containing them, or
- when serving as a **Peer Review** Team Captain, to treat as confidential, not disclose or discuss with any third party, destroy all drafts of the written report, destroy all memory media containing any drafts of the written report and the final report, and destroy all except one copy of the written report immediately after submitting the original copy to the participating firm, and, 30 days thereafter, to destroy the sole copy in my possession, and
- in the case of uncertainty about proper procedure, to address the issue to the appropriate party within the participating firm (such as the CEO) and within GBA (such as the Chair of the Peer Review Committee, the President, or the Chair of the Council of Fellows).

Signed \_\_\_\_\_ Date \_\_\_\_\_  
(Peer Reviewer)

## CEO Critique of Review Team

Peer Review No. \_\_\_\_\_

The value and success of *Peer Review* depend on the participation of effective Reviewers in an up-to-date Review process. Your firm has just completed a *Peer Review*. Please help us improve the quality of our process and Reviewer training. Just complete the following critique and return it to us promptly. Thank you!

**Instructions:**

This questionnaire is to be completed by the participating firm's or office's CEO. Most of the questions can be answered using brief comments or by checking the appropriate boxes. It should only take you a few minutes, but if you have strong feelings about certain issues, please expand your comments. Many of the questions can be answered on a 5 to 1 basis, 5 being a positive superlative and 1 being a negative superlative.

**Note:** GBA records indicate that the following individuals are being evaluated by this questionnaire:

**Captain:** \_\_\_\_\_

**Team Member #1** \_\_\_\_\_

**Team Member #2** \_\_\_\_\_

**Team Member #3** \_\_\_\_\_

**This questionnaire was completed by:** \_\_\_\_\_

## CEO Critique of Review Team

Peer Review No. \_\_\_\_\_

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**Note:** GBA records indicate that the following individuals are being evaluated by this questionnaire:

**Captain:** \_\_\_\_\_

**Team Member #1** \_\_\_\_\_

**Team Member #2** \_\_\_\_\_

**Team Member #3** \_\_\_\_\_

**This questionnaire was completed by:** \_\_\_\_\_

Please rate your recent experience with the firm on a 1 (strongly disagree) to 10 (strongly agree) basis.

	N/A	1	2	3	4	5	6	7	8	9	10
The scoping process was helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I was able to mold the peer review process to fit my firm's unique situation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selecting my team captain was easy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selecting my other team member(s) was easy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I spent a lot of time assembling documents for the peer review team.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It was valuable to prepare for the peer review.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The peer review experience was good for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The peer review experience was good for our firm.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The peer review team conformed to our schedule.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The reviewers worked well together.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The reviewers did a good job evaluating our core management components.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The reviewers were courteous to our staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The reviewers communicated with our staff well.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The reviewers did a good job on the exit conference.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The reviewers did a nice job on their report.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Captain did a good job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The team members did a good job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The on-site review time was about right.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The off-site review time was about right.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The staff surveys were helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The client surveys were helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Comments**

1. What problems were not discussed during the *Peer Review*?

---

2. What were the most beneficial aspects of *Peer Review*?

---

3. Were there any significant negative aspects of *Peer Review*?

---

4. What should be done to improve the *Peer Review* process before your next Review?

---

5. What did this *Peer Review* mean to you and your firm?

---

Can we use this quote in our promotion of the *Peer Review* process?

Yes

No

Complete and return to:  
**GBA**  
info@geoprofessional.org