ACI Peer Review

The term “peer review” is often used for the process of subjecting scholarly work to review by other experts in the field, particularly for scientific and academic publications and research funding. “The peer review panel members use clear-cut criteria for practitioner competence and standards for excellence. By engaging in a peer review and cooperating in this means of assuring competent, ethical practice, you are demonstrating your commitment to best serve your clients’ goals and needs.”

The ACI process for peer review, however, was for professional development and focused on a facilitated conversation with peers on important aspects of a consultant’s professional practice. These were:

1. Effectiveness: An exploration of your practice with emphasis on results and consequences for your clients as well as yourself.
2. Theory Base: An assessment of your integration of theories and concepts into your own practice.
3. Ethical Behavior: A review of ethical dilemmas you encounter and how you resolve them.
4. Supporting Diversity: An examination of your skill in recognizing and addressing social issues of discrimination and sustainability.
5. Development Goals: A discussion of the direction and plans for your continuing professional development and growth.

Consultants who prepared the Peer Review packet found the process rigorous, and often was the first time they had ever described or defined their practice. The Peer Review Panel did not sit in judgment; their task was to raise issues and ask questions that would encourage the consultant to continue to evaluate their consultancy.

After the first extensive Peer Review, each consultant was Re-Reviewed every four years. The Re-Review was less rigorous, and focused on the individual’s current work, issues and dreams.

Peer Review Steps

The first step: Curriculum Vitae using specific guidelines for providing information:
The CV was reviewed by the Peer Review Panel, a rotating sub-set of the membership. If the CV indicated the level of experience was sufficient to make Peer Review useful for the individual, the next step was to identify a division or divisons for Peer Review and prepare as indicated.

Curriculum Vitae Guidelines:

1. The experiences the consultant has had in whichever division she or he plans to seek peer review.
2. Dates and/or amount of time each experience lasted and key aspects of the experience that communicate to the PRP the breadth and depth of his or her experience should be rioted. A satisfactory CV would contain a brief paragraph on each such experience. For example, one might mention each major project without naming the client, its duration, the contact person and large aspects of the work (i.e., the diagnosis, how the work was done, interventions and which they were and the outcome).
3. Educational achievements that are relevant to the division of ACI to be in. For

example, if one has done a dissertation or thesis, a brief description of such and the findings should be included.
4. A list of any publications relevant to your division.
5. Any other information the person would like the PRP to know about his or her qualifications.
6.In general, besides the resume, the CV doesn't need to exceed 3-5 pages, depending upon the list of publications.

Five Divisions of Practice

A consultant might choose to qualify in more than one division. Peer review in multiple divisions could be done at the same time or separately. The Peer Review panel might decide to award one or more divisions, even one the consultant may not have considered. For example, a person asking for peer review for Organizational Development might have demonstrated expertise in Small Group Development.

Division One: Personal and Professional Development
The focus was on individual processes of learning and development as it occurs in various life stages, in the context of interpersonal and working relationships with others in their human systems. Coaching professionals, career counselors, and others who worked with individuals often found this division appropriate to their professional practices.

Division Two: Small Group Development
The focus was on small groups as arenas for learning about social and task behavior, relationships and consequences, within and between individuals and groups. Facilitators, trainers, and those who worked with small groups in a variety of capacities found this division appropriate.

Division Three: Organization Development
Here the focus was on working with members and leaders of organizations to improve efficiency and effectiveness. It included the design and implementation of planned system changes using change strategies to maximize the internal strengths of the organization and build strong internal networks. Organization development consultants, internal and external, fit very well into this division, as do certain management consultants and agents of change, societal as well as organizational.

Division Four: Societal Change
The focus here was on work with communities and broader social and human systems to generate and implement constructive improvements, in pursuit of common causes and the public good. Here was the division home for those dedicated to social change in communities as well as organizations, working in areas as varied as environmental sustainability and human resource diversity.

Division Five: Managers and Executives as Changes Agents
The focus here was on the work of a manager or executive within an organization to develop the individuals, groups, and the organization itself. Leaders in a variety of organization and social development functions found that this division reflected their professional needs.

While the value of this process for newer consultants and practitioners was self-evident, some established specialists would say "But I'm already a seasoned professional" and felt little need to review or develop their professional practices. However, the ACI peer review process in dialogue with peers ensured that even established internal or external practitioners found great value in deliberating, assessing, and re-energizing their practice. Consultants who embraced the experience found it often led to adjustments in priorities and direction, as well as positive changes to practice and lifestyle. Since it occurred every four years, Peer Review proved extremely useful in establishing new directions of practice.

A usual path was to be Peer Reviewed in one area, and over time explore other areas of expertise, eventually requesting a peer review in another area.

Details of Guide For Peer Review – "The Packet"

Once the Division or divisions to be reviewed have been selected, the individual prepares a packet of information for the Peer Review Panel to review. The Panel's task is to thoroughly understand the information, and prepare guidance in the form of questions and considerations that may further the consultant's exploration of their consulting platform.

Resume:
Background, other professional and life experiences, as well as basic biographies and demographic data assist Peer Review Panel members to achieve a broader perspective of the new member and get to know him/her more fully.

Education and Training Statements:
This section should list specific education/training experience the new member has that relates directly to the Division for which she or he is applying. It should demonstrate competence in that Division. Information on internships, supervised training, apprenticeships, special seminars, writing, research, work experience, on-the-job training, etc. should be included. The number, duration and type of training laboratories or workshops in which the new member has been a member should be noted. Earned degrees should not be solely relied upon to demonstrate competence.

Letter from Liaison/nominator:
It is the Liaison/nominators function to become well enough acquainted with the new member to be able to answer questions that the Peer Review Panel may ask, through an interactive process. The letter should describe how the new member and Liaison/nominator worked together and how the new member handled the process of preparation for review.

Theory of Practice:
One of the ways the Peer Review Panel seeks to establish clear, professional standards and criteria for practice is to ask new members to provide a clear theoretical formulation for their practice, and the capacity to appropriately apply it in practice. Theories should be written in a manner that would be easily understood by the public. Concise, synthesized statements are needed that respond to the items below. In preparing the statement, the new member should include the following:

- A definition of the new member's theoretical position.
- A discussion of the grounds on which the new member's choice was made from among available theoretical positions, or an evolved combination of them.
- A description of how the new member applies her or his theory in practice.
- The theoretical statement should pay particular attention to:

- More effective use of human resources.
- More effective approaches to problem-solving.
- Increased congruence between the goals of the individuals and those of the organization.
- Increased capacity of the organization for responsible initiative and responsiveness to its environment.
- More effective input into decision-making by those affected by the decision
- More effective organizational structures
- More effective processes for policy development and role negotiation
- More effective systems for the resolution of conflict and distribution of power
- More adequate protection of human rights, maximizing human satisfaction and fulfillment
- Normative changes
- Ethics of Practice: In preparing the statement, an new member should include the following:
- A defined set of ethical standards
- A description of decisions taken in the new member's practice as a result of his or her, ethical position, citing examples.
- A signed copy of the ACI ethics statement is required.

Socio-political Issues:
The statement should include what the new member has done to enable clients to deal more competently with such social/political issues as gender, race, age and ethnicity at work, home and in the world. The new member should address such dimensions as:

- Awareness of oppressive forces (toward women, social and ethnic minorities, ageism, reverse discrimination and classism) in client organizations
- Awareness of personal issues regarding minorities and ways in which personal dynamics affect behaviors in situations where it is appropriate to address minority-majority issues
- Awareness of institutional issues regarding minorities, women and others who are different and ways in which institutional dynamics work for or against oppression and dehumanization
- Building in opportunities for all members to contribute and enjoy the benefits of the institution
- Commitment to work toward change where indicated and identified in self and client system
- Ongoing skill development to affect institutional change
- Recognition of the hidden and obvious implications of policies that are harmful and personal willingness to do something about them
- The new member's understanding of his or her own diversity. How is this reflected in and how does it respond to the above items

Record of Practice:
An outline of the new member's practice of the past 2- 4 years, using the following format (co-training and supervised training experiences as appropriate should be included):

Preferred table format:
Name of event, organization, duration, new member's Role, and names of other

professionals. In relation to role, the nature of the new member's responsibilities to the client system should be described. If the organization or community was not the new member's client, it should be noted under "Other Professionals" the name of the consultant primarily responsible for the contract and other consultants with whom the new member worked.

Colleague Statements:
Three fellow professionals with whom the new member has worked more than once and who can give a differentiated description of his or her competencies, are asked to submit evaluation statements directly to the ACI Peer Review Panel Coordinator. Evaluations should be based upon first-hand knowledge of the new member's competencies. Letters from trainers in training laboratories in which the new member was a participant should not be submitted. Because ACI is concerned with members' competencies in dealing with socio-political issues, the application would be strengthened by letters from women or other minority professionals.

Client Statements:
Three clients are asked to submit an evaluation statement of the new member's work with them directly to the Peer Review Panel Coordinator. The more specific the evaluation, the more helpful these statements are. The new member may want to guide the clients by advising them for what division(s) the new member is applying and ask them to speak to the competencies as they experienced them.

New Concepts and Applications Developed/Design Concepts

For Divisions 1 and 2:
The new member is to briefly describe the concepts and methods she or he considers in developing personal and professional capabilities of the client (Div. 1), or concepts and methods considered in designing a lab or small group experience (Div. 2.). The new member is to explain why she or he modifies a design during the course of the experience/consultation.

For all Divisions:
The new member is to describe any new concepts, applications or methodologies she or he has developed in the course of his or her practice. These examples may be designs, theories, exercises, group interactions, entry modes, interventions, etc., which the new member has developed and applied with her or his clients.

Examples of Successful Critical Incidences:
Of particular interest to the Peer Review Panel are the ways in which professionals handle those critical incidents that can make or break an intervention effort in your Division area. The new member should describe two or more such incidents in his or her practice, with emphasis on the nature of the incident (with a minimum of history), the ways in which she or he dealt with the client/incident and the results/resolution of the efforts on both him/her and his or her professional development and that of the client.

Examples of Unsuccessful Interventions:
Often we, as practitioners, find we learn more and become more effective through our less successful efforts. The Peer Review Panel is interested in a thoughtful analysis of two efforts the new member would deem unsuccessful and a discussion of what learning was gained from those situations.

Conclusion

Associated Consultants International (ACI) was created to establish criteria for competence as a consultant, develop standards for practitioners, and support its members to meet and exceed those standards. We are making our Peer Review processes available in hope that individuals or other groups will find the information helpful in their own collegial explorations.