



1030-1188 West Georgia Street
Vancouver, BC V6E 4A2
Tel: 604.687.8027 Fax: 604.687.3264
E-mail: info@abcfp.ca
Web Site: www.abcfp.ca

March 14, 2005

Dear ABCFP Member:

RE: Discussion Paper on the Peer Review Element of the ABCFP Continuing Competency Program

The following discussion paper on the development of the association's continuing competency program is designed to elicit your comments and input.

The professional practice committee (PPC) completed the first stage of the continuing competency program—self-assessment—earlier this year. Beginning this year, it is now mandatory for all registered members to complete a self-assessment annually. If you don't complete a self-assessment each year and notify the association that you have done one, you will not be able to renew your membership for the following year.

Unlike the mandatory nature of the self-assessment element, peer reviews are a voluntary element in the continuing competency program. The goal of the peer review element is to create a paradigm shift from one of members critiquing each other to one of members motivating each other to improve.

The PPC would like to know how members can be motivated to become involved in a peer review. The PPC would also like to hear how you would answer some of the questions and challenges that are presented in the discussion paper.

Your constructive input is important to the ABCFP and the members of the PPC who are working on your behalf to develop this element of the continuing competency program. We want to hear from you. All we ask is that you be as constructive as possible. Give us ideas on how to make peer reviews work. Let us know your concerns but also tell us how you would alleviate those concerns. Only with your input can the PPC put together a peer review program that will work for all ABCFP members. The deadline for input is **Friday, April 29, 2005**. Send your comments to Dwight Yochim, RPF (dyochim@abcfp.ca) or by mail or fax to the association office.

Thank you in advance for your time in helping the PPC further develop the continuing competency program.

Sincerely,

Brian Robinson, RPF
Chair, Professional Practice Committee

ABCFP
Continuing Competency Program

Element Two:
Voluntary Peer Review Options
The Paradigm Shift from Critiquing to Motivating

Discussion Paper
March 2005

Comments on this discussion paper will be accepted until **Friday, April 29, 2005**.
All comments and questions should be directed to Dwight Yochim, RPF at:
dyochim@abcfp.ca

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Introduction

Bylaw 13 of the Association of BC Forest Professionals (ABC FP) states that council shall, in consultation with the general membership, develop one or more quality assurance programs that shall be binding on one or more class or category of membership. The bylaw also states that any quality assurance program developed by council shall clearly set out the requirements members must satisfy in order to retain their rights of membership and practice.

Essential criteria of a continuing competency program to satisfy the requirements of the quality assurance program were outlined in an April 2003 discussion paper. This paper was updated to reflect member input collected through 27 meetings around the province and a multitude of written responses. Council endorsed a final report, entitled “A Continuing Competency Program for Members of the ABCFP” in July 2003. This report outlines and meets the criteria under Bylaw 13 and consists of three elements:

1. Mandatory annual self-assessment for all members,
2. Voluntary peer review, and
3. Mandatory practice review for a sample of members.

These three elements are currently being implemented in phases over the next few years. The self-assessment phase is now complete. It is now mandatory that all registered, active members complete their self-assessment in order to renew their membership for 2006 and each year thereafter. Each of the other two phases will involve further consultation with members.

The following describes the increasing comprehensiveness of each element:

- The self-assessment is a first party review of one’s own professional practice.
- The voluntary peer review is a second party assessment of constructive dialogue between a member being reviewed (subject member) and a peer reviewer to assess and improve the professional practice of the member being reviewed. The peer reviewer will probably benefit from this assessment as well.
- The practice review is an independent, third party audit of a member’s professional practice looking for documented evidence of appropriate, results-based professional practice.

Members who do participate in a voluntary peer review are less likely to be selected for a practice review. There will also be other benefits for members being reviewed and peer reviewers developed in consultation with the membership, through this options paper and through future input and meetings.

Since peer reviews are voluntary, it is expected that peer reviewers will volunteer their time to carry out peer reviews.

The intent of the peer review is to instill a paradigm shift in the membership from one of critiquing others through these reviews to motivating others to improve and increase their level of professionalism. This builds on the self-assessment. It is anticipated that the whole process will take approximately one-half day to one day to complete. The review will focus on professional practice. It will not focus on the technical details of a member’s practice or judge a member’s opinion. Also, peer reviews will not be connected to the discipline process, except in extreme circumstances.

According to Bylaw 6.5.4: “Enrolled members are not subject to quality assurance programs and continuing competency requirements as may be adopted by council from time-to-time.” Therefore, the peer review process is intended for registered, active members, although enrolled members are encouraged to voluntarily complete peer reviews to benefit their professional practice.

The objectives of a voluntary peer review program are to:

- a) Provide for constructive dialogue, mentoring, and knowledge transfer between members,
- b) Support member self-assessments,
- c) Improve member ability to demonstrate due diligence,
- d) Demonstrate our professional competence to the public,
- e) Prepare members, if chosen, for practice reviews,
- f) Provide a pro-active process to improve member:
 - Advocacy and practice of good stewardship,
 - Professional independence, integrity and competence,
 - Signing and sealing practice, and
 - Due diligence.
- g) Partially achieve the requirements of Bylaw 13,
- h) Encourage public confidence in the profession and the support of professional reliance,
- i) Minimize the chance of discipline complaints (proactive rather than reactive), and
- j) Identify knowledge and practice gaps/strengths to benefit individual members.

This options paper has 3 parts:

Part 1: Important elements to maintain the integrity of the voluntary peer review process,

Part 2: Optional elements for voluntary peer reviews, and

Part 3: Proposed forms for carrying out voluntary peer reviews.

Members should review and provide comments for all parts of this peer review options paper to the ABCFP.

Part 1: Important Elements to Maintain the Integrity of the Voluntary Peer Review Process

The following peer review elements are considered important to demonstrate both public and professional credibility and ensure a positive result during a third party audit. **Members are encouraged to provide comments about these important elements.**

1.0 General Elements of a Peer Review

- Since peer reviews are professional documents, all peer review forms must be signed, sealed and dated by peer reviewers.
- The ABCFP will set an appropriate periodicity (e.g.: every “X” years and/or one year after a significant job or career change) for carrying out voluntary peer reviews.
- A peer reviewer must send a declaration (form 5), signed, sealed and dated by both the member being reviewed and peer reviewer to the ABCFP notifying that X peer reviewer(s) have completed an independent peer review without conflict of interest of Y member being reviewed’s professional forestry and non-forestry professional practice (job duties which do not fall under the definition of professional forestry practice) to ABCFP approved standards.
- Peer reviews must be effective.
- There are no mandatory requirements to submit a peer review to the ABCFP.
- Voluntary peer reviews **are applicable** to all registered, active members and will address both the member being reviewed’s professional forestry and professional conduct elements of practice. (Note: This includes members who are **not** practicing professional forestry because they are still subject to professional conduct).
- The peer review will be less rigorous (fewer number of questions) for members being reviewed who do not practice professional forestry.
- The peer review consists of four parts:
 - a) Preparing for the review and gathering information,
 - b) Evaluating the member being reviewed’s self-assessment,
 - c) Assessing professional forestry and non-forestry professional practice, and
 - d) Preparing the professional development plan.
- All peer review information, forms and standards will be available on the ABCFP web site.
- When the peer review process is finalized, checklists will be developed for members being reviewed and peer reviewers.
- The *Foresters Act*, Bylaws (including the Standards of Professional Practice and the Code of Ethics), and ABCFP publications will be used to evaluate both professional forestry and non-forestry professional practice.
- The peer reviewer must respect the confidentiality of all peer reviews.
- The peer reviewer will provide a verbal exit summary to the member being reviewed as well as a written draft review. The member being reviewed can review the draft to either acknowledge it, or provide comments for the peer reviewer’s consideration to include in the final version of the peer review.

2.0 General Protocol for Carrying Out a Peer Review

2.1 General Conduct

Peer reviewers do not impose their personal agendas or corporate philosophy onto members being reviewed. They use professional judgment to evaluate a member being reviewed's professional forestry and non-forestry professional practice against professional standards and prepare an independent professional development plan intended to improve the member being reviewed's professional practice. An independent peer reviewer will not impose self-interest opinion or the opinion of interest, majority or employer groups. The peer reviewer will give independent consideration to all information provided by the member being reviewed by applying professional judgment decisions solely against peer review standards.

A peer reviewer must avoid the following phrases when asking questions or making enquiries/comments:

- “In my opinion, you should...”
- “I would do this differently.”
- “Why haven't you...?”
- “Aren't you going to...?”
- “There's no way that I would...”
- “There is a better way to do this.”
- “You're kidding! You are in deep...”

Instead, the peer reviewer must use the following types of phrases:

- “Would you be able to provide a documented rationale why...?”
- “What other methods could you use to ensure due diligence?”
- “Can you show me some documentation to...?”
- “Are there any other ways to achieve these results?”
- “For this situation, can you show me how...?”
- “Can you tell me the potential positive and negative consequences of your actions?”

2.2 Findings of Potential Professional Misconduct

Peer reviews are **not** intended to be a vehicle for reporting potential professional misconduct as part of the discipline process, except for extreme cases.

If a peer reviewer comes across potential professional misconduct, she or he must follow bylaws 11.3.3 and 11.4.3 (Code of Ethics, Responsibility to the Public and Profession) and must also respect any confidentiality agreements associated with the practice in question. A peer reviewer must do the following steps in sequence, if she or he discovers potential professional misconduct:

1. Make sure the facts that may support professional misconduct are correct.
2. If possible, resolve the matter with the member being reviewed and establish due diligence practices in the peer review professional development plan to avoid any future potential professional misconduct.
3. If the above cannot be resolved with the member being reviewed, take the matter to the member being reviewed's supervisor or employee for resolution.

4. If steps 2 and 3 are not appropriate, report the matter to the ABCFP, through the registrar. Note that only in exceptional circumstances, or extreme examples of professional misconduct, would it be inappropriate to raise the matter with the member being reviewed or her or his supervisor, employer or client.

3.0 Preparing for a Peer Review and Gathering Information

3.1 Tasks for the Member being Reviewed

3.11 Choosing a Peer Reviewer

A member being reviewed must choose a peer reviewer who is qualified to provide constructive, independent advice with no perceived conflict of interest with the member being reviewed's professional practice. A peer reviewer cannot be a relative or spouse of the member being reviewed. Members being reviewed cannot choose peer reviewers who may feel obligated to provide a positive review because of a close business or personal relationship, position of employment, or because of a debt or favour being owed. Is bias introduced if the member being reviewed is allowed to choose the peer reviewer? Refer to other options for choosing a peer reviewer in Part 2, Section 4.0.

Members being reviewed must choose registered, active ABCFP members with current knowledge of professional principles who will be able to maintain confidentiality. Request for, and acknowledgement by, a peer reviewer should be made and confirmed in writing (includes E-mail).

There are no consequences to a peer reviewer if she or he chooses not to carry out a review upon request.

3.12 Preparing for a Peer Review

To prepare for a review, a member being reviewed must confer with the peer reviewer, arrange for a suitable, quiet place to meet and gather all appropriate documentation and information.

After the peer reviewer commits to the peer review, the member being reviewed should have a dialogue with the peer reviewer to mutually determine what documentation and information is required to be gathered for the peer review. Examples of this information are:

- Professional diary and phone log,
- An example of professional work from the member being reviewed's primary area of professional forestry practice,
- Documented authorization from an appropriate party to use other types of reviews,
- Results of other types of reviews (performance reviews, assessments, audits, inspections or monitoring),
- Standard Operating Procedures,
- Examples of due diligence practices,
- Professional development records,
- *Foresters Act*, Bylaws and ABCFP publications, and
- Self-assessment and associated professional development plan,

The member being reviewed should also become familiar with all the peer review questions/ enquiries, standards and forms from the ABCFP web site and gather any other necessary materials or information.

3.2 Tasks for the Peer Reviewer

3.21 Preparing for a Peer Review

Peer reviewers should suggest alternate peer reviewers if they cannot carry out a review.

If the peer reviewer is not familiar with the areas of practice he/she should decline or get another peer reviewer to cover areas they are not familiar with. The member(s) being reviewed need to know the member being reviewed's:

- Areas of professional forestry and non-forestry professional practice,
- Past related reviews that can be combined with the peer review, and
- Self-assessment.

To further prepare for the review, the peer reviewer should:

- Become familiar with peer review requirements, processes and questions/enquiries, located on the ABCFP web site, if it is a first-time review,
- Collect and review the information outlined in Section 3.12, either before, or during the face-to-face meeting with the member being reviewed, and
- Review appropriate parts of the *Foresters Act*, Code of Ethics, Standards of Professional Practice and the following publications (available on the ABCFP web site):
 - Professional Independence and the ABCFP Member,
 - Managing for Species at Risk (if applicable to the member being reviewed's area of practice),
 - Interpreting the Public's Interest (if applicable to the member being reviewed's area of practice),
 - Element One: Self-Assessment Guide, and
 - "Application of Professional Discretion Under the Forest Practices Code" and "Professional Reliance Implementation Guidelines." (These publications contain dated information so only obtain general professional principles from them).

3.22 Form 1: Combining a Peer Review With Another Type of Review

If a peer review is using information or results from another type of review (e.g.: audits, internal assessments, performance reviews or operational plan reviews), the peer reviewer must complete the following on Form 1 before starting the review:

- A description of the other review,
- The date the other review was completed,
- The methodology of how the other review was combined with the peer review, and
- Signed authorization, by an appropriate party, that information or results from another type of review can be used for the purpose of carrying out a peer review.

4.0 Form 2: Peer Review Self-Assessment Evaluation

The peer review self-assessment evaluation is applicable to all members being reviewed regardless of whether or not they practice professional forestry.

The peer reviewer must use Form 2 to:

- a) Verify that the member being reviewed has completed self-assessments on an annual basis or after major career changes starting from October 2005 onwards.
- b) Verify appropriate implementation of the member being reviewed's self-assessment professional development plan. For each item requiring action, check to see if appropriate action(s) were taken by the anticipated completion date and document the following on Form 2: Peer Review Self-Assessment Evaluation and Form 4: Peer Review Professional Development Plan.
 - o If action was taken towards professional development, record the documented evidence supporting that action. If an action is recorded as being completed on a certain date, but there is no documented evidence of the action, record this finding and include it as an action item on Form 4: Peer Review Professional Development Plan.
 - o If actions were not taken by the anticipated completion date, look for documented reasons why that part of the professional development plan was not achieved. If there is no documented reason, record this finding and include it as an action item on Form 4: Peer Review Professional Development Plan.

5.0 Form 3: Professional Forestry and Non-Forestry Professional Practice Evaluation

Peer reviewers should use the following guidance when completing Form 3:

- For each question/enquiry, evaluate the member being reviewed's response or documented evidence and using your professional judgment, record whether it is superior, adequate, needs improvement or is not applicable.
 - o A superior evaluation means that the member being reviewed is practicing to higher than expected standards.
 - o An adequate evaluation means that the member being reviewed is practicing to standards expected from a member.
 - o If the member being reviewed needs improvement, record this as an action item on Form 4: Peer Review Professional Development Plan.
 - o Check "not applicable" if the question or enquiry does not apply to the member being reviewed's professional forestry or non-forestry professional practice.

Refer to Part 2: Optional Elements for Voluntary Peer Reviews to review potential peer review questions and enquiries.

6.0 Form 4: Peer Review Professional Development Plan

The peer reviewer must complete the Peer Review Professional Development Plan and the member being reviewed is encouraged to implement the development plan. The following describes how to complete Form 4:

- List the items requiring improvement.
- Describe the action required to achieve improvement. Include what needs to be completed and how it will be completed, and, if appropriate, include who will help the member being reviewed achieve the required action. Consult the member being reviewed to ensure these recommendations are realistic.
- In consultation with the member being reviewed, record the anticipated completion date for each improvement item.
- The member being reviewed will record when each improvement item is completed.

7.0 Form 5: Peer Review Declaration of Completion

After the peer review is completed, the peer reviewer's final task is to complete and submit Form 5 to the ABCFP. It is a signed, sealed and dated declaration by both the member being reviewed and peer reviewer that an independent peer review was completed without conflict of interest to the approved standards.

8.0 Tracking Peer Reviews

The ABCFP will keep track of who completed peer reviews upon receipt of each signed, sealed and dated declaration submitted by each peer reviewer. This will:

- Provide the proportion of registered, active members completing peer reviews on an annual and cumulative basis, and
- Provide a record of members who have completed peer reviews so they can receive a lesser chance of being chosen for future practice reviews.

The ABCFP will monitor and continually improve the peer review process, mainly from member input.

9.0 Checklist for Members being Reviewed

This will be completed when the peer review process is finalized.

10.0 Checklist for Peer Reviewers

This will be completed when the peer review process is finalized.

Part 2: Optional Elements for Voluntary Peer Reviews

These optional elements are also for discussion and form potential elements for the peer review program. **The ABCFP requests member input on these optional elements to build peer review process details.**

1.0 Potential Benefits of Completing a Peer Review

A member could have less likelihood of receiving a practice review (element three of the ABCFP Quality Assurance Program) if she or he completes a peer review. Listed below are some options for how this lower likelihood of a practice review can be determined, as well as some other benefits of completing a peer review. **Members are encouraged to suggest other types of incentives for doing peer reviews.**

Note: The names of members receiving practice reviews will be randomly chosen from the sample population of registered, active members on an annual basis. The annual sample size has not been established at this time but it will probably start at a low number and increase as experience, expertise and funding is developed.

1.1 Options for Determining the Lesser Likelihood of Receiving a Practice Review if a Member Completes a Peer Review

- If a member has completed a peer review within the last X years, she or he will have a lesser chance of being randomly chosen for a practice review. The following are some options for calculating this lesser chance. Members are welcome to submit other suggestions for consideration. The numbers used in the following calculation are only examples for demonstration purposes.
 - The practice review sample size is 1000 members, 200 members have completed a peer review within the last X years and 50 members (5% sample) will be randomly chosen for practice reviews. The first draw will choose 35 members who have not completed peer reviews from a sample size of 800 = $35/800 = 4.375\%$. The second draw will choose the remaining 15 members with the sample size being the sum of both types of members [$200 + 765 (800 - 35) = 965$] = 1.55% . This means that members who completed a peer review will have a 1.55% chance of being chosen for a practice review and members who didn't complete a peer review will have a $(1.55\% + 4.375\%) 5.925\%$ chance of being chosen for a practice review.
- As above, but with different sample sizes for practice reviews and different proportions drawn between peer review and non-peer review members.
- If a member is chosen for a practice review, the member can submit her or his peer review (must have been completed within the last X years) so a practice review committee (trained practice reviewers) can evaluate it. If the peer review is completed to the required standards, the member can avoid the practice review. (Note: this option would only be available once or twice to prevent a member from perpetually avoiding a practice review by continually doing peer reviews). This emphasizes that all members should be chosen for at least one practice review during their career.
- As above, except that a member can continually avoid a practice review if she or he continually completes peer reviews every few years to required standards, as evaluated by a practice review committee. This emphasizes that the benefits of having as many members as possible completing peer reviews outweighs the concern of having these members avoid a practice review.

- The practice review committee will shred the member being reviewed's copy of the peer review after they have made their evaluation
- Since the practice review is an ABCFP document for audit purposes and if a member chooses to avoid a practice review by submitting a peer review, then the peer review should be kept on file like a practice review.

1.2 Other Optional Benefits to Members if They Complete a Peer Review (in addition to the above)

- If a member completes a peer review and is chosen for a practice review, the information from the peer review can be used to decrease the time for, and complexity of, a practice review (give weight to the peer review),
- Members being reviewed can receive credits towards the volunteer ABCFP Continuing Education (CE) Program at the rate of one credit per peer review contact hour,
- The member being reviewed can receive a discount (10%?) on their next year's membership dues,
- The ABCFP can look into the possibility of a discount for professional liability insurance for members who complete a peer review,
- If a member completes a peer review, her or his name can go into a draw for reimbursed membership for one year, and
- If a member completes a peer review, her or his name can go into a draw for free attendance at the next ABCFP Annual General Meeting.

2.0 Potential Benefits of Being a Peer Reviewer

Peer reviewers will improve their own professional practice with increased professional knowledge gained through carrying out peer reviews. The following are other potential benefits a peer reviewer can receive:

- Peer reviewers can receive credits towards the volunteer ABCFP Continuing Education (CE) Program at the rate of one credit per peer review contact hour.
- The ABCFP can choose 10 peer reviewers (or a pre-determined proportion of peer reviewers) each ABCFP fiscal year by lottery to receive a reimbursed membership for one year. A peer reviewer's chances for reimbursed membership increases in proportion to the number of peer reviews voluntarily completed in one fiscal year.
- As above, except peer reviewers will also be eligible, by annual lottery, to receive free attendance at the ABCFP Annual General Meeting.
- If a peer reviewer completes 5 reviews within a 2-year period she or he will receive a free item of ABCFP ware.
- The peer reviewer can receive a discount (10%?) on their next year's membership dues.

3.0 Potential General Elements of a Peer Review

- A peer review would be completed every 3, 4 or 5 years.
- The peer review should be done as a face-to-face meeting in the office or field, or a combination of both. In unusual circumstances, it may be possible to complete a peer review by a combination of phone, email and/or written communication.
- The Association can provide training for peer reviewers.
- Peer reviews can be completed at the same time as other types of reviews or audits.
- Employers may elect to have all employees who are ABCFP active, registered members regularly receive peer reviews as corporate policy.
- If there is a dispute between the member being reviewed and the peer reviewer over any evaluation or recommendation as part of the peer review, the peer reviewer will make note in the final determination, since the peer reviewer's role is to provide an independent, constructive assessment of the member being reviewed's professional practice.
- Other option for the above dispute: It can be resolved by an independent person, mutually agreed upon by the peer reviewer and member being reviewed.

4.0 Potential Criteria for Choosing a Peer Reviewer

- Since peer reviewers will focus on professional practice, they may not require full technical knowledge of the member being reviewed's area of practice, although the more knowledge the peer reviewer has about the member being reviewed's technical aspects of practice, the better.
- The peer reviewer can be of a similar position to the member being reviewed, a supervisor, a client, or someone who is not professionally associated with the member being reviewed.
- Peer reviewers should have at least 5 years of experience since registration and should have prior (although not required) experience or training in carrying out reviews, assessments or audits.
- In an ideal situation, the peer reviewer should have more professional experience than the member being reviewed, or be a mentor.
- Will the peer review process be perceived to be biased if a member being reviewed chooses a peer reviewer? Should the ABCFP appoint peer reviewers?
- The ABCFP or members being reviewed can choose peer reviewers with no conflicts of interest from a central list of qualified volunteer peer reviewers. This list would be maintained on the web site.
- It may be difficult for a member who works outside of British Columbia to complete a peer review because of a lack of suitable peer reviewers or prohibitive peer reviewer travel cost.
- Members being reviewed can choose multiple peer reviewers.
- The peer reviewer can be from another geographical area, but the member being reviewed would be responsible for any expenses incurred.

5.0 Potential Self-Assessment Peer Review Evaluation (Form 2)

- For questions 1, 2 and 6 to 11 on the member being reviewed's self-assessment, evaluate each question and look for documented evidence to support the member being reviewed's ratings. Report all findings and incorporate into the peer review professional development plan, if appropriate.
- The above may be more suited to being part of a practice review.

6.0 Proposed Professional Forestry and Non-Forestry Professional Practice Evaluation (Form 3)

These questions form the bulk of the peer review and since they will be highly scrutinized, they are listed as optional elements.

Option for Form 3:

- Record a summary of the member being reviewed's response to each question/enquiry in addition to evaluating whether it is superior, adequate or needs improvement.

6.1 Proposed Professional Forestry Practice Evaluation

Proposed Pre-Amble

Use these questions/enquiries if the member being reviewed practices professional forestry for all or any part of their total time (minor % to 100%). If the member being reviewed only practices professional forestry for a minor part of their total time, some of these questions will be "not applicable" and this should be recorded on Form 3: Professional Forestry and Non-Forestry Professional Practice Evaluation. There is a smaller list of questions/enquiries for members being reviewed who do not practice any aspects of professional forestry.

Guidelines to help interpret, ask, and answer the questions/enquiries are in italics immediately following the question. Do not feel obligated to ask the questions/enquiries word for word. Use professional judgment to probe for the facts.

Have the member being reviewed consider all professional forestry and non-professional areas of practice (refer to the self-assessment) when responding to each question/enquiry.

Questions/enquiries marked with an asterisk may not be applicable to non-professional areas of practice.

Each question or enquiry should refer to the member being reviewed's professional forestry or non-forestry professional practice within the past year if it is the first peer review and for subsequent peer reviews, the time frame for questions/enquiries should refer to the period from the last peer review to the present peer review.

If the peer reviewer evaluates that the member being reviewed needs improvement in relation to any question/enquiry, it is not regarded as a negative finding or professional misconduct, except in extreme cases. The intent of a peer review is to highlight the importance of each question/enquiry and to develop realistic improvement actions in a professional development plan.

Questions/enquiries are divided into eight categories:

1. Advocacy,
2. Professional independence,
3. Professional integrity,
4. Professional competence,
5. Signing and sealing,
6. Due diligence,
7. Stewardship, and
8. Other professional/ethical issues.

Start the peer review by checking if the member's registration certificate is appropriately displayed.

1. Advocacy

- a) *Describe how you advocate good stewardship of forest land and how you work to extend public knowledge of forestry. The question does not ask if the member being reviewed **practices** good forest stewardship. Whether the member being reviewed practices good forest stewardship is revealed by the cumulative results of all the questions and enquiries. Advocacy and knowledge extension can be demonstrated in many forms, such as: participation in Forest Professional Networks, internal communication, making enquiries, writing articles and letters, public speaking, community or committee involvement and bringing matters to appropriate parties' attention. Reference: Bylaw 11.3.1 and 11.3.6.

2. Professional Independence

- a) Has an employer/client ever asked you to compromise your professional principles? How did you handle it? (If you are a manager, how do you exercise management prerogative without being in conflict with professional principles?) Did the member being reviewed raise and discuss the matter with her or his employer or client, or ask a peer, supervisor, the ABCFP or the Practice Advisory Service for advice? If applicable, did the member being reviewed advocate for change, withdraw their services, or refuse to endorse or facilitate the situation? Was the matter resolved? If the peer reviewer is the member being reviewed's supervisor and the member being reviewed is uncomfortable with answering this question, she or he should ask the ABCFP or Practice Advisory Service for advice. References: Bylaw 11.3.2; Independence Standard of Professional Practice; "Professional Independence and the ABCPF Member".
- b) Give examples of where you have publicly voiced your professional opinion. Describe how you maintained your professional independence while voicing your opinion. The member being reviewed should have provided truthful and accurate statements, not suppressed information or misrepresented the facts to bolster their opinion, declared the interest for whom they were speaking, stated the negative and positive aspects or outcomes and demonstrated having adequate experience and knowledge to provide the opinion. This question is related to the seventh professional integrity questions and there may be some overlap. References: Bylaws 11.3.6, 11.3.8, 11.3.9, 11.4.4, 11.4.7, independence Standard of Professional Practice, "Professional Independence and the ABCPF Member".

- c) *Provide an example where you had to make a professional work decision, recommendation or prescription based on input/comments from a variety of sources such as peers, other types of resource professionals and various publics. Describe the process you followed to make a professionally independent decision. In addition to independence from a client or employer, members must also demonstrate independence from special interest groups, majority groups and self-interest or bias. As well, members must give “independent consideration” while exercising professional judgment to make decisions. Reference: “Professional Independence and the ABCPF Member”, pages 3 and 4; Self-assessment questions 10 n, o. This question is related to the first stewardship question and there may be some overlap.

3. Professional Integrity

- a) How do you handle a situation where you may suspect or know that another member may be guilty of infamous or unprofessional conduct, conduct unbecoming a member, negligence or in breach of the *Foresters Act* or Bylaws? What steps did you take to resolve the situation? Did the member being reviewed, in sequence, verify facts, consult with knowledgeable peers, resolve the matter with the offending member, use the Practice Advisory Service or contact the ABCFP? This question is related to the second stewardship question so there may be some overlap. Reference: Bylaw 11.4.3.
- b) How do you keep up to date with environmental, industrial and construction safety legislation and policy related to your job duties? Reference: Bylaw: 11.3.10; Self-assessment question 6.
- c) What steps do you take to ensure that confidential or proprietary information that is available to you while executing your job duties is not disclosed? Do you have consent to use this information? What measures do you take to avoid disclosure of such information? The member being reviewed must know which information is in the public domain and which is proprietary or confidential. Confidential or proprietary information can only be disclosed to others or used by the member with consent from the client, employer or appropriate party. Is confidential information stored in a secure manner? Reference: Bylaw 11.5.2.
- d) What steps do you take to ensure work assignments do not create, or perceive to create a conflict of interest? How do you resolve an issue if it does create a conflict? Did the member being reviewed decline the assignment or inform all appropriate parties of the conflict or potential conflict to resolve the issue? Reference: Bylaw 11.5.6.
- e) For consulting members being reviewed: Describe the general process you use to charge for services rendered. The intent is to determine if charges for services rendered are calculated in a fair manner based on scope of work and level of service and experience. The member being reviewed does not need to supply detailed information, such as formulas, because this may be proprietary information. Reference: Bylaw 11.5.7.
- f) *For members being reviewed who review, and provide comments or recommendations regarding professional work, which is prepared by other members: Describe the methodology, thought processes and rationales you use to review and provide comments or recommendations on another member’s professional work. How do you avoid imposing your professional opinion onto the

other member's work? It is acceptable for a peer reviewer to provide her or his professional opinion concerning professional work for which another member is professionally accountable. It is unacceptable to impose this professional opinion, unless the peer reviewer is exercising management prerogative within the limits of professional principles. Peer reviewers must have respectful regard for other professional's education and experience. References: Professional Reliance Implementation Guidelines and Application of Professional Discretion Under the Forest Practices Code. **Note: These references are outdated and should only be used for general, and not specific guidance.**

- g) What steps do you take to avoid disputes with other members, other types of resource professionals or various publics? What do you do to resolve differences of opinion? Try to understand and respect the other party's opinion; use professional integrity and independence to build your case or position; use respectful regard to ask questions about the other party's opinion and engage in amicable dialogue to ensure a mutual learning experience; use independent data sources to support your opinion; mutually agree on an independent third party to resolve the issue; be open-minded; work together and share information to find a solution; abstain from undignified public communication with another member; avoid criticizing the work of other members or attempting to injure the professional reputation or business of another member. This question is related to the second professional independence question so there may be some overlap. References: Bylaws 11.6.1, 11.6.2.
- h) Are you presently sponsoring enrolled members? If so, describe how you:
- Guide their development towards professionalism,
 - Provide advice, direction and diversity for their work experience period,
 - Provide advice and direction for their development and assume responsibility for their accountability, and
 - Assist them in preparing for the registration exam.

Refer to ABCFP *Sponsoring Forester Policy*, especially sections 2.2, 2.3, 3.0, 4.2, 4.3, 5.0, 6.0 and Appendices I and II. Other References: Bylaws 6.3.1, 6.4.1, 11.6.3.

4. Professional Competence

- a) How do you remain competent in your field of practice, continually improve practices and policies affecting the stewardship of forest land and share knowledge and experience with others? The member being reviewed should be able to describe actions and activities used to keep up to date with her or his field of practice, continually improve practices and share knowledge and experience with others. References: Bylaws 11.3.5, 11.3.7, 11.3.9, 11.4.6; Knowledge Standard of Professional Practice; Voluntary continuing education guide; Self-assessment questions 6 and 7. This question is related to the third due diligence question so there may be some overlap.
- b) Provide documentation to demonstrate your professional competence? Has the member being reviewed satisfied the requirements for question 2 of the self-assessment (documented professional development activities)? The intent is not to scrutinize this documentation, but to see if it has been completed. Reference: Competence Standard of Professional Practice.

- c) *Provide a written example of professional work product from one of your primary areas of practice. The peer reviewer will check the work product against the appropriate requirements listed under the Completeness and Correctness Standard of Professional Practice, Guidelines for Interpretation. If the work product is confidential, the member being reviewed must get permission from an appropriate party before the peer reviewer reads it. (Other option: The peer reviewer could examine a work product from each area of practice listed in self-assessment question 5A to see if it complies with the Completeness and Correctness Standard of Professional Practice, however, this may be more suited for a practice review).
- d) If you are ever asked to practice outside your limits of experience or expertise, or found yourself in a situation where you were practicing outside your area of competence, what do you do? The member being reviewed's options are: a) decline the assignment, b) acquire the knowledge if it is possible to do so without undue delay or expense to the client or employer, or c) consult with appropriate specialists. Reference: Knowledge Standard of Professional Practice.
- e) Explain how you are providing opportunities for the professional development and advancement of other members in your employ or supervision. What is the member being reviewed doing to encourage subordinate members achieving the requirements of the ABCFP voluntary continuing education program? How is the member being reviewed acting as a mentor and providing training for advancement? Reference: Bylaw 11.6.3.

5. **Signing and Sealing**

- a) *Explain how you determine if you need to sign and seal a document. The member being reviewed must sign and seal all professional documents prepared by her or himself or prepared under her or his supervision. References: Bylaws 11.4.5, 10.2, 10.3, 10.4
- b) *Do you sign and seal professional documents where some or all of the work is carried out by someone else? If so, do you add the required certification statements as per Bylaws 10.5.1 and 10.5.2? Make sure the member being reviewed knows the difference between the two certification statements.

6. **Due Diligence**

- a) *Do you incorporate the work of other resource professionals into any of your professional work and/or do you sign and seal professional documents where some or all of the work is carried out by someone else? If so, describe the due diligence practices you carry out to ensure the work is done to a professional level. The member being reviewed was personally familiar with all relevant characteristics of the area affected by the work and if external advice was sought from a specialist, the member being reviewed made sure that the specialist was qualified and competent to give that advice, was a registered professional who acted independently, and the advice made sense based on the member being reviewed's own personal knowledge. Reference: Due Diligence Standard of Professional Practice; self-assessment question 10 f-j.
- b) *Can you provide documentation to support the above? The intent is not to verify the documentation. The peer reviewer just needs a description of the documentation to see if it is adequate.
- c) Describe how you become familiar with client/employer objectives and requirements and how they relate to other values and interests. Does the member being reviewed have organized information sources for reference, checklists of

various requirements and when they apply these objectives and requirements, does she or he document how they affect other values and interests? How does the member being reviewed become familiar with relevant characteristics of her or his areas of professional practice? How does the member being reviewed become familiar with relevant geographical and ecological characteristics of the land base on which she or he works. This question is related to the first professional competence question and there may be some overlap. References: Bylaw 11.5.3 and Due Diligence Standard of Professional Practice; self-assessment questions 10 b-d.

- d) Describe how you assess and manage risk. The member being reviewed should use and document a methodology for assessing and managing risk (function of the severity of the hazard of an activity and the magnitude of potential consequences or impacts associated with that activity). References: Professional Care Standard of Professional Practice; due diligence Standard of Professional Practice; Bylaw 11.5.1; self-assessment question 10 k.
- e) Do you keep a properly maintained professional diary and phone log? Old diaries and phone logs should be appropriately stored and a professional diary should have:
- Daily, dated notations,
 - Description, date and time of significant activities, findings or events,
 - Rationales to support important decisions or reference to where rationales can be found, and
 - For consultants: A record of date, time and a description of consulting activities which will be charged to a client.

A phone log should record date, time and details of relevant phone conversations. Reference: Due Diligence Standard of Professional Practice; Self-Assessment, question 9 f.

- f) Describe how you take and document all necessary steps to ensure that desired outcomes are achieved or the chances of negative consequences or outcomes are minimized. The member being reviewed should use various tools such as checklists, policies, best management practices, forms/templates, environmental management systems, flow charts or standard operating procedures, through which it can be demonstrated that all appropriate procedures were followed to ensure no relevant steps or considerations were missed while implementing various activities. Reference: Due Diligence Standard of Professional Practice.
- g) Describe how you handle practice administration with respect to:
- Having an effective filing and document storage/recovery system,
 - Being the only one who can make a change to your professional documents,
 - Accessing your professional documents even if you are no longer an employee,
 - Having supporting materials underlying your professional documents on file and appropriately cross-referenced,
 - Having appropriate controls in place to prevent accidental destruction and loss of your professional documents, and
 - Retaining professional documents long enough to cover your liability period. These are Self-Assessment questions 9a-e and 9g. Listen to the member being reviewed's description and determine if you agree with the member being reviewed's self-assessment. If not, amend the self-assessment professional

development plan and include the amendments in the peer review professional development plan. Reference: Due Diligence Standard of Professional Practice.

7. Stewardship

- a) *Explain how you determine the identity of the public who are affected by your area of practice and how you interpret their interests in order to make professional decisions or prescribe forest management practices? Use “Interpreting the Publics’ Interests” ABCFP publication to evaluate this question. Are there other types of publics to consider beyond local interest groups and First Nations, such as community, regional, provincial, national and international publics? Does the member being reviewed understand the publics’ relationships to the land? Discuss the tools to understand the publics’ interests provided on page 6 of the publication. How does the member being reviewed use independent consideration to interpret the publics’ interest (related to the third professional independence question)? Does the member being reviewed balance each decision or prescription around the various interests or do all decisions and prescriptions collectively form a balance? The intent here is for the member being reviewed and peer reviewer to engage in a learning dialogue to improve how the publics’ interest is interpreted. Reference: Bylaw: 11.3.3.
- b) What steps did you take if you became aware of any practices that were detrimental to good stewardship of forest land? In sequence, verify facts, consult with knowledgeable peers, resolve the matter with the offending party, use the Practice Advisory Service or contact the ABCFP. This question is related to the first professional integrity question so there may be some overlap. Reference: Bylaw 11.3.4.
- c) *How are you keeping informed, assessing practices, developing options, monitoring, participating in, and advocating when managing species at risk. Refer to the “Managing for Species at Risk: What are a Forester’s Professional Responsibilities?” ABCFP publication to evaluate this question. Use the direction provided on pages 8-10 to engage in a learning dialogue to improve how species at risk are managed.

8. Other Professional Issues

- a) Are there any other professional forestry or non-forestry professional practice issues you would like to discuss or is there anything else you would like added to the peer review professional development plan? This is a chance to provide closure and discuss or implement any other ideas for improvement which came up during the peer review.

6.2 Proposed Non-Forestry Professional Practice Evaluation

Proposed Pre-Amble

The following are proposed questions/enquiries to evaluate members being reviewed who do **not** practice **any** aspects of professional forestry. These are in addition to the required Peer Review Self-Assessment Evaluation (Form 2).

Each question or enquiry should refer to the member being reviewed's non-forestry professional practice within the past X years if it is the first peer review and for subsequent peer reviews, the time frame for questions and enquiries should refer to the period from the last peer review to the present peer review.

Determine the member being reviewed's areas of non-forestry professional practice using the self-assessment Table 5, or something similar. Make sure all of these areas of non-forestry professional practice are considered while asking, evaluating and answering the questions/enquiries.

Questions/enquiries are divided into six categories:

1. Professional independence,
2. Professional integrity,
3. Professional competence,
4. Due diligence,
5. Stewardship, and
6. Other issues.

Start the peer review by checking if the member's registration certificate is appropriately displayed.

1. Professional Independence

- a) How do you handle situations where your employer or client may ask you to compromise professional principles?(If you are a manager, how do you exercise management prerogative without being in conflict with professional principles?) Did the member being reviewed raise and discuss the matter with her or his employer or client, or ask a peer, supervisor, the ABCFP or the Practice Advisory Service for advice? If applicable, did the member being reviewed advocate for change, withdraw their services, or refuse to endorse or facilitate the situation? Was the matter resolved? If the peer reviewer is the member being reviewed's supervisor and the member being reviewed is uncomfortable with answering this question, she or he should ask the ABCFP or Practice Advisory Service for advice. References: Bylaw 11.3.2; Independence Standard of Professional Practice; "Professional Independence and the ABCPF Member".
- b) Give examples of where you have publicly voiced your professional opinion. Describe how you maintained your professional independence while voicing your opinion. The member being reviewed should have provided truthful and accurate statements, not suppressed information or misrepresented the facts to bolster their opinion, declared the interest for whom they were speaking, stated the negative and positive aspects or outcomes and demonstrated having adequate experience and knowledge to provide the opinion. This question is related to the sixth professional integrity question so there may be some overlap. References: Bylaws 11.3.6, 11.3.8, 11.3.9, 11.4.4, 11.4.7, independence Standard of Professional Practice, "Professional Independence and the ABCPF Member".

2. Professional Integrity

- a) How do you handle a situation where you may suspect or know that another member may be guilty of infamous or unprofessional conduct, conduct unbecoming a member, negligence or in breach of the Foresters Act or Bylaws? What steps did you take to resolve the situation? Did the member being reviewed verify, in sequence, facts, consult with peers, resolve the matter with the offending member, use the Practice Advisory Service or contact the ABCFP? This question is related to the first stewardship question so there may be some overlap. Reference: Bylaw 11.4.3.
- b) How do you keep up to date with environmental, industrial and construction safety legislation and policy related to your job duties? Reference: Bylaw: 11.3.10; Self-assessment question 6.
- c) What steps did you take to ensure that confidential or proprietary information that is available to you while executing your job duties is not disclosed? Do you have consent to use this information? What measures do you take to avoid disclosure of such information? The member being reviewed must know which information is in the public domain and which is proprietary or confidential. Confidential or proprietary information can only be disclosed to others or used by the member with consent from the client, employer or appropriate party. Is confidential information stored in a secure manner? Reference: Bylaw 11.5.2.
- d) What steps did you take to ensure work assignments do not create, or perceive to create a conflict of interest? How do you resolve an issue if it does create a conflict? Did the member being reviewed decline the assignment or inform all appropriate parties of the conflict or potential conflict to resolve the issue? Reference: Bylaw 11.5.6.
- e) For consulting members being reviewed: Describe the general process you use to charge for services rendered. The intent is to determine if charges for services rendered are calculated in a fair manner based on scope of work and level of service and experience. The member being reviewed does not need to supply detailed information, such as formulas, because this may be proprietary information. Reference: Bylaw 11.5.7.
- f) Have you been involved with any disputes with other members, other types of resource professionals or various publics? If so, what did you do to resolve the differences of opinion? Try to understand and respect the other party's opinion; use professional integrity and independence to build your case or position; use respectful regard to ask questions about the other party's opinion and engage in amicable dialogue to ensure a mutual learning experience; use independent data sources to support your opinion; mutually agree on an independent third party to resolve the issue; be open-minded; work together and share information to find a solution; abstain from undignified public communication with another member; avoid criticizing the work of other members or attempting to injure the professional reputation or business of another member. This question is related to the second professional independence question so there may be some overlap. References: Bylaws 11.6.1, 11.6.2.
- g) Are you presently sponsoring enrolled members? If so, describe how you:
 - Guide their development towards professionalism,
 - Provide advice, direction and diversity for their work experience period,

- Provide advice and direction for their development and assume responsibility for their accountability, and
- Assist them in preparing for the registration exam.

Refer to ABCFP *Sponsoring Forester Policy*, especially sections 2.2, 2.3, 3.0, 4.2, 4.3, 5.0, 6.0 and Appendices I and II. Other References: Bylaws 6.3.1, 6.4.1, 11.6.3.

3. Professional Competence

- a) How do you remain competent in your field of practice, continually improve practices and policies affecting the stewardship of forest land and share knowledge and experience with others? The member being reviewed should be able to describe actions and activities used to keep up to date with her or his field of practice, continually improve practices and share knowledge and experience with others. References: Bylaws 11.3.5, 11.3.7, 11.3.9, 11.4.6; Knowledge Standard of Professional Practice; Voluntary continuing education guide; Self-assessment questions 6 and 7. This question is related to the first due diligence question so there may be some overlap.
- b) Provide documentation to demonstrate your professional competence? Has the member being reviewed satisfied the requirements for question 2 of the self-assessment (documented professional development activities)? The intent is not to scrutinize this documentation, but to see if it has been completed. Reference: Competence Standard of Professional Practice.
- c) If you are ever asked to practice outside your limits of experience or expertise, or found yourself in a situation where you were practicing outside your area of competence, what do you do? The member being reviewed's options are: a) decline the assignment, b) acquire the knowledge if it is possible to do so without undue delay or expense to the client or employer, or c) consult with appropriate specialists. Reference: Knowledge Standard of Professional Practice.
- d) Explain how you are providing opportunities for the professional development and advancement of other members in your employ or supervision. What is the member being reviewed doing to encourage subordinate members achieving the requirements of the ABCFP voluntary continuing education program? How is the member being reviewed acting as a mentor and providing training for advancement? Reference: Bylaw 11.6.3.

4. Due Diligence

- a) Describe how you become familiar with client/employer objectives and requirements and how they relate to other values and interests. Does the member being reviewed have organized information sources for reference, checklists of various requirements and when they apply these objectives and requirements, does she or he document how they affect other values and interests? How does the member being reviewed become familiar with relevant characteristics of her or his areas of professional practice? How does the member being reviewed become familiar with relevant geographical and ecological characteristics of the land base on which she or he works. This question is related to the first professional competence question and there may be some overlap. References: Bylaw 11.5.3 and Due Diligence Standard of Professional Practice; self-assessment questions 10 b-d.

- b) Describe how you assess and manage risk. The member being reviewed should use and document a methodology for assessing and managing risk (function of the severity of the hazard of an activity and the magnitude of potential consequences or impacts associated with that activity). References: Professional Care Standard of Professional Practice; due diligence Standard of Professional Practice; Bylaw 11.5.1; self-assessment question 10 k.
- c) Do you keep a properly maintained professional diary and phone log? Old diaries and phone logs should be appropriately stored and a professional diary should have:
- Daily, dated notations,
 - Description, date and time of significant activities, findings or events,
 - Rationales to support important decisions or reference to where rationales can be found, and
 - For consultants: A record of date, time and a description of consulting activities which will be charged to a client.

A phone log should record date, time and details of relevant phone conversations. Reference: Due Diligence Standard of Professional Practice; Self-Assessment, question 9 f.

- d) Describe how you take and document all necessary steps to ensure that desired outcomes are achieved or the chances of negative consequences or outcomes are minimized. The member being reviewed should use various tools such as checklists, policies, best management practices, forms/templates, environmental management systems, flow charts or standard operating procedures, through which it can be demonstrated that all appropriate procedures were followed to ensure no relevant steps or considerations were missed while implementing various activities. Reference: Due Diligence Standard of Professional Practice.
- e) Describe how you handle practice administration with respect to:
- Having an effective filing and document storage/recovery system,
 - Being the only one who can make a change to your professional documents,
 - Accessing your professional documents even if you are no longer an employee,
 - Having supporting materials underlying your professional documents on file and appropriately cross-referenced,
 - Having appropriate controls in place to prevent accidental destruction and loss of your professional documents, and
 - Retaining professional documents long enough to cover your liability period. These are Self-Assessment questions 9a-e and 9g. Listen to the member being reviewed's description and determine if you agree with the member being reviewed's self-assessment. If not, amend the self-assessment professional development plan and include the amendments in the peer review professional development plan. Reference: Due Diligence Standard of Professional Practice.

5. Stewardship

- a) What steps did you take if you became aware of any practices that were detrimental to good stewardship of forest land? In sequence, verify facts, consult with knowledgeable peers, resolve the matter with the offending party, use the Practice Advisory Service or contact the ABCFP. This question is related to the first professional integrity question. Reference: Bylaw 11.3.4.

6. Other Professional Issues

- a) Are there any other professional forestry or non-forestry professional practice issues you would like to discuss or is there anything else you would like added to the peer review professional development plan? This is a chance to provide closure and discuss or implement any other ideas for improvement which came up during the peer review.

7.0 Options for Tracking Peer Reviews

- If peer reviews are voluntarily submitted to the ABCFP to avoid a practice review (if this option is approved), the ABCFP can track the general results of peer reviews anonymously, with member permission.
- Members can anonymously submit a summary of their peer review to the ABCFP so the Association can track general results for public interest.

Part 3: Proposed Forms for Completing Peer Reviews

Form 1: Combining a Peer Review with another Type of Review

To be completed by the peer reviewer before starting the peer review.

Description of the Review Being Combined With the Peer Review	Date the Other Review was Completed	Methodology of How the Other Review was Combined with the Peer Review	Signed Authorization to Use the Other Review

Date: _____

Peer Reviewer's Signature and Seal: _____

Form 2: Peer Review Self-Assessment Evaluation

Has the member being reviewed completed annual self-assessments or after major career changes? If no, explain.

Self-assessment item requiring action	Item done by anticipated completion date? yes/no	If item was done, was completion documented? If yes, describe. If no, why?	If item was not done, is there a documented reason? yes/no

Date: _____

Peer Reviewer's Signature and Seal: _____

Form 3: Professional Forestry and Non-Forestry Professional Practice Evaluation

Questions/enquires will be added to the form once they are finalized.

Check the most appropriate column

Question/Enquiry	Superior	Adequate	Needs Improvement	Not Applicable

Date: _____ Peer Reviewer's Signature and Seal: _____

Form 4: Peer Review Professional Development Plan

List improvements needed from the Peer Review Self-Assessment Evaluation (Form 2) and improvements needed from the Professional Forestry and Non-Forestry Professional Practice Evaluation (Form 3).

Item Requiring Improvement	Action(s) to be Taken	Anticipated Completion Date	Date Completed

Date: _____

Peer Reviewer's Signature and Seal: _____

Form 5: Declaration of Peer Review Completion

We declare that _____ RPF/RFT has completed an independent peer review without conflict of interest of _____'s RPF/RFT professional forestry and non-forestry professional practice to ABCFP Approved Standards.

Date

Peer Reviewer

Signature and Seal

Member being Reviewed

Signature and Seal