



**The National Architectural
Accrediting Board®**

NAAB TRANSFORMATION REPORT
JULY 2017–DECEMBER 2018
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Introduction

In mid-2017, the Board of Directors and staff team members of the National Architectural Accrediting Board committed to effecting significant organizational transformation. These changes are both cultural and operational across the programs and processes of accreditation, certification, and validation. The shared goal is to enhance value through greater service and support while streamlining and modernizing practices.

Concurrently, our collateral partners (ACSA, AIA, AIAS, and NCARB) asked the NAAB Board of Directors to review the organization's annual budget to identify potential areas of cost savings that might lead to reduced annual contributions from the collaterals as well as cost savings to schools. Through budget refinements based on collateral conversations, the NAAB board reduced the overall contribution from the collaterals by \$193,314 in the period from 2017 to 2019, which represents an approximate 13.5% reduction in our operating revenue. As the NAAB continues its major transition, it will endeavor to keep the organization's cost effectiveness and sustainability in balance with the value to the schools and collaterals.

*"You are 'moving a mountain'
(an ancient Chinese saying
about someone carrying out
inconceivable work...) and are
much appreciated by us!"*

~ Tian Feng, FAIA, FCSI
Vice President
California Architects Board

The collateral architectural organizations have offered their support to – and encouragement for – the NAAB during this period of organizational change, which the NAAB gratefully acknowledges and appreciates. This report highlights the most notable of these accomplishments and achievements and includes testimonials from our greater community. The spirit and momentum of this organizational transformation will be crucial to maintain as the NAAB searches for a permanent executive director; we have every confidence in this success!

Accreditation

Enhancing Value:

Accreditation Review Forum 2019 (ARForum19):

- The approach (planning, process, and event) for the former ARC is strategically transformed:

The goal of the ARForum19 is to identify changes to the Conditions for Accreditation that have the potential to change the NAAB's system for accreditation into one that retains what is successful, reforms what is inefficient, and sets a pattern for consistency and fairness in processes that would also reduce effort and expense by programs, all without sacrificing rigor. To achieve this, there are several major changes:

- Formation of an Accreditation Review Forum 2019 Steering Committee comprised of nominated representatives from the four other collaterals and meeting for 15 months prior to the Forum.
- In the past, the collaterals prepared position papers to describe their goals for architectural education and accreditation. For this Forum, the Steering Committee will collectively prepare a position paper representing the interests of the profession as a whole.

- The Accreditation Review Conferences of the past were attended by a set of individuals nominated by the collaterals, a mix of collateral leaders, as well as other persons with some level of knowledge, interest, or engagement in education. For 2019, the Boards of Directors of all the collateral organizations will attend.
- In preparation, input is sought from the collateral organizations and other stakeholders to gain their perspective on the future of the continuum of architectural education.
- With this approach, both the NAAB's Conditions for Accreditation and Procedures for Accreditation will be published concurrently, as 2020 versions.
- An increased focus on the architectural education continuum is encouraged for all collaterals.

Visiting Teams

Composition

- Balanced the composition of each individual team relative to visit experience, diversity, geographic representation, and other factors.
- Increased opportunities for potential team chairs to gain experience in chairing visits, expanding the cadre of eligible team chairs and their capability.

“This was one of the best teams I have ever worked with in my 19 visits.”

~ Michael J. Buono, FAIA
Emeritus Professor/HSA Director
Drury University

- Utilized a greater number of members in the team pool rather than placing the same people year-to-year.
- Aligned the AIAS representative to the type of program being visited (i.e., B. Arch. to B. Arch. and M. Arch. to M. Arch.).

“I can’t tell you how grateful we are for the wonderful team that we had visit us. Accreditation is never easy, but I can honestly say that our team made it an enjoyable and illuminating experience. Best to you in all you do to support each team’s efforts!”

~ Cindy Urness
Dean
North Dakota State University

- Conducted refined in-person team training in November 2017, with high evaluations by participants.
- Created Team Training Task Force to provide enhancements to in-person and online training for team members.

“... NAAB did a wonderful job assembling a stellar team ...”

~ David Cronrath, FAIA
Associate Provost
University of Maryland

Communication and Responsiveness

- Sent notifications to individuals who are rolling off their respective collateral team pools (new and forever).

“Working with you is so much less stressful than things used to be at NAAB. I really appreciate all of your efforts.”

~ Alex Bitterman, M. Arch., Ph.D.
Professor and Chair
SUNY Alfred State College of
Technology

- Provided each collateral with a list of their team pool members who were placed on visits (new and forever).
- Sent formal thank you letters to each person serving on a visiting team (new and forever).
- Improved customer service by providing answers quickly and efficiently to a myriad of questions/inquiries.
- Instituted “NAAB Summer Scholar” program, for local college student to conduct beneficial accreditation-related research during summer break.

- Moved editing of Visiting Team Reports in-house, to reduce costs and enhance quality of final product for dissemination to the board and publication by the NAAB and schools.
- Improved preparation and publication of Annual Report on Architecture Education for 2017, with enhancements noted by board members, schools and programs, collaterals, and other stakeholders.

“This is fantastic help! I appreciate you taking the time to compose the email and point me in the right direction. I am certainly looking forward to working with you and your team in the near future.”

~ David Barker, M. Arch, LEED AP
Assistant Professor
Utah Valley University

Streamlining and Modernizing:

Volunteer Management System:

- Streamlined the team composition process by implementing a new volunteer management system (VMS – “lineup”).
- This system offers the capability to require team members to agree to abide by the new Anti-Harassment Policy and revised Confidentiality Agreement.
- Automated the required evaluation of/for fellow team members (formerly done via Word documents/hard copies).
- Incorporated these evaluations into lineup to consider ratings of potential team members when assembling teams.
- We are still working toward database accuracy, as it is a new system.

Accreditation Management System:

- Following the RFP and selection process, migrated accreditation management software to new platform (AMS – Armature “Fabric” platform) to consolidate multiple functions into one site for both end users and NAAB staff.
- The new system allows other designated staff to access records and information as necessary (staff “silos” have been eliminated!).

Future:

- The new AMS will allow schools to upload APR materials via a pre-programmed template, and visiting teams to review APR's and do some VTR work.
- NAAB visiting team members will soon be able to secure AIA continuing education credits for their participation in online training modules; this will eliminate the need for them to self-report.
- There is a plan to launch annual check-in phone calls to program directors to ensure they are aware of deadlines and requirements for upcoming visits.
- A Certification Task Force is being formed to consider the potential for certifying two-year and four-year programs as preparatory toward a NAAB-accredited degree.

“I just received your NAAB note thanking me for my service this past year. Usually I am not a sucker for such things, but I really appreciate the kind words ...”

~ Mark McKechnie
NAAB Accreditation
Team Member

Certification

(Through the Education Evaluation Services for Architects [EESA] program)

Enhancing Value:

- Added a website feature to allow EESA applicants to upload their documents electronically and securely. Their official transcript is still required by mail, but this saves time, expedites the process, and maintains the applicant's materials.
- Published the EESA Glossary of Terms to introduce applicants to terminology used throughout the process, allowing them to become more familiar with the requirements, and keeping them on-track.
- Regularly developing other materials for the applicants' use to provide further clarity and guidance.
- An updated communication plan will provide applicants automated messages on the status of their application.
- Improvements to the EESA system will generate reports of the EESA applications annually, to help in understanding the background of the licensure candidates identifying common deficiencies among applicants. (In progress.)
- Reduced the processing time of EESA evaluations and reconsiderations to four to five weeks from the date of assignment for EESA applicants and 10 business days from the receipt of the request for reconsiderations, a timing compression of 50%.

Streamlining and Modernizing:

- Refreshed EESA website/system/platform, a significant enhancement in the user interface.

Validation

Enhancing Value:

- Migrated the management of the Canberra Accord Secretariat in-house to facilitate stronger support, communication, and service to all signatories and provisional members.
- Finalized update, redesign, and refresh of Canberra Accord website.
- International Committee:
 - Invited international member to join the committee and provided orientation on NAAB processes and activities.
 - Launched initiative with the AIA International Region to expand the pool of Substantial Equivalency visiting team members.
 - Drafted and approved new edition of the Substantial Equivalency Conditions
 - Preparing new edition of the Substantial Equivalency Procedures.

Leadership Engagement

Enhancing Value:

- Rather than holding a separate committee summit, a fourth board meeting has been combined with this session, allowing coordination of the work of the committees and ensuring board and committee alignment with NAAB goals. This also provides more opportunity for direct and meaningful engagement of the leadership.
- Increased support to the Board of Directors through regular communications and inclusion of revised and new informational documents (Board roster, committee roster, committee assignments and charges, officer travel schedule). This includes earlier and more detailed communications about meeting agenda content, logistics, and materials and the addition of travel itineraries for the President and President-elect.
- Formed Governance Committee as a standing committee of the Board of Directors, with charges as now placed in the Rules of the Board.
- Among other duties, the Governance Committee now serves as a de-facto nominating committee, fully vetting the candidates received from the collaterals for NAAB directorships.
- Formed International Committee as a standing committee of the Board of Directors, with charges as now placed in the Rules of the Board.
- Developed two new critical policies:
 - Anti-harassment Policy for Board of Directors, committee members, and team pool (approved July 2018)
 - Whistleblower Policy (approved January 2019)
- In process of conducting comprehensive review and revisions to current governing documents and policies:
 - Accounting Policies and Procedures (approved January 2019)
 - Employee Manual (approved January 2019)
 - Conflict of Interest (approved October 2018)
 - Fiduciary Duty (approved October 2018)
 - Rules of the Board of Directors (in process)
 - Bylaws (in process)
- Refined the charges for all committees for inclusion in the Rules of the Board.
- Provide regular updates to board members via e-mail between meetings, thus engaging the board more regularly and reducing the amount of time spent reporting in meetings.

- Completely refreshed New Director Orientation format, content, and materials.
- Formed NAAB “Past Presidents’ Council” to engage this distinguished body of former NAAB leaders; the group met once in 2018 and will meet twice in 2019.
- Developed a new three-year (2018-2020) Strategic Plan, fully 1.5 years ahead of schedule due to major transformations in goals, objectives, and strategies for the organization on behalf of its stakeholders.

Streamlining and Modernizing:

- Updated secure board site to share meeting and board materials in a more organized and streamlined manner. For 2019, this sharing platform has shifted to Box.com for an even easier approach.

Future:

- Addition of several new policies in 2019, including Risk Management and Records Retention.
- Currently reviewing and revising the Bylaws, Rules of the Board, and NAAB Policies documents, for approval by the Board in 2019.
- Beginning in 2019, development of a presidential timeline for each incoming president.

Operational Effectiveness

Transformations in Finance and Tech:

Enhancing Value:

- A new four-year Memorandum of Understanding with the supporting collaterals (ACSA, AIA, AIAS, and NCARB) has been reached for 2019-2022.
- Data as generated by the Annual Reporting System is now freely shared with all of the collateral organizations.
- Provided online access for all employees to paystubs, W-2s, and PTO.
- Documents as required by the Memorandum of Understanding are now being regularly conveyed by the NAAB to the collateral organizations.
- Employees may now enroll in the Flexible Health Savings Account, where employees receive a tax benefit.
- Managed Request for Proposal process and selection of a new wealth management firm through the Finance and Audit Committee.
- The Finance and Audit Committee shepherded the refresh of the NAAB's Investment Policy Statement (IPS), setting forth performance goals and protections for the significant reserves account.

- Significant adjustments have been made to the NAAB staff complement, while major reductions in the use of outside consultants, vendors, and contractors have been effected.

Streamlining and Modernizing:

- Following a significant study on potential office space relocation, the NAAB secured a sub-tenant for the remaining six years of its lease at 1101 Connecticut Avenue, NW. Concurrently, temporary space and a short-term lease were obtained through the AIA at 1735 New York Avenue. This will allow the Board of Directors and incoming Executive Director to study and determine the organization's spatial and operational needs, as well as the best location to reduce lease expenses, in the long term.
- Migrated the accounting software from the outdated system to QuickBooks, the best fit based on size, activities, and transactions.
- Consolidated NAAB and EESA accounts, reducing double entries required in old platforms, saving time, and minimizing errors.

- Now manage accounts payables 100% online through bill.com, facilitating access to vendor history, swift payment approvals, tracking payment status, and accounting records.
- Migrated payroll processing to ADP, allowing better control, customized online reports, and links to related services.
- Linked ADP to the new Workers Compensation Insurance platform, providing the opportunity to move from annual to bi-monthly payments.
- Moved from paper timesheets to online timesheets through ADP, where employees enter their time from any location. The accounting team can access reports in real time for scheduling needs and allocation of payroll to different activities while maintaining better records.
- Created master list of all accounts and subscriptions, with planned consolidation of unnecessary contracts and/or replacement by better/less expensive products.
- Made naab.org a secure site through SSL certificate.
- Evaluated and cancelled unnecessary services/expenses.
- Implemented NAAB box.com site for all committee and board work.
- Simplified and modernized the phone system and decreased monthly expenses.
- Transitioned from former travel agency to Concur travel platform, which is simpler for staff and guest travelers.
- Compiled a NAAB style sheet for grammar, style, etc. (to roll out in January 2019).
- Re-engaged with ASPA, the Association of Specialized and Professional Accreditors, to remain informed on developments and trends in specialty accreditation.

“... Your email was one of the nicest things I have ever seen. It is customer service at its best. Thank you.”

~ Laura J. Brown
Program Assistant
Taubman College of Architecture
and Urban Planning
The University of Michigan



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