

VISION, MISSION & MANDATE

Vision:

An Ontario in which architects are valued contributors to society, by creating a safe and healthy built environment that performs at the highest levels and elevates the human spirit.

Mission:

To serve the public interest through the regulation, support, and promotion of the profession of architecture in Ontario.

Mandate:

To regulate and govern the practice of architecture in Ontario in the service and protection of the public interest in accordance with the *Architects Act*, its Regulations and Bylaws; to develop and uphold standards of skill, knowledge, qualification, practice, and professional ethics among architects; and to promote the appreciation of architecture within the broader society.

May 2016



OAA COUNCIL MEETINGS

RULES AND PROCEDURES

Meetings of the Council of the Ontario Association of Architects (OAA) are conducted in accordance with Roberts Rules of Order which is included in the Councillor Orientation Binder, unless stipulated otherwise with the by-laws or as otherwise approved by OAA Council – see below.

Rules and Procedures for Discussion/Debate/Motions within Council Meetings

- 1) The maximum time for a speech in debate on a motion is two minutes.
- 2) The Chair shall keep a speakers' list of those wishing to speak to a specific item or motion; and
 - a) the speakers' list shall be built in the order that the Chair notes a member's intention to speak; and
 - b) any member having not spoken to a motion shall be given preference on the speakers' list over any member who has already spoken.
- 3) An original main motion may only be introduced at a meeting if it has been added under New Business to the agenda approved for that meeting.
- 4) Meetings of the Council of the Ontario Association of Architects (OAA) are conducted in accordance with Roberts Rules of Order which is included in the Councillor Orientation material, unless stipulated otherwise with the by-laws or as otherwise approved by OAA Council.
- 5) An item *For Information Only* which no Council member indicates will be the subject of a question or an original main motion is considered to be dispensed upon approval of the agenda for that meeting.
- 6) The meeting will move to a period of informal discussion immediately after a new item has been presented and any questions on the item have been put and answered, but before an original main motion on the item is introduced; and
 - a) a period of informal discussion is defined as the opportunity to discuss an item without there being a motion on the floor; and
 - b) the Chair of the meeting when the item is introduced continues as the Chair during the period of informal discussion unless they choose to relinquish the Chair; and
 - c) in a period of informal discussion the regular rules of debate are suspended; and
 - d) a period of informal discussion ceases when the Chair notes that no additional members wish to speak to the item or when an incidental motion to return to the regular rules of debate passes with a majority; and
 - e) immediately upon leaving a period of informal discussion, the presenter of the item may move an original main motion on the item and the formal rules of debate resume; and



f) if the presenter of the item moves no motion on the item then the item is considered dispensed unless an indication to introduce additional original main motions on the item is on the agenda, in which case each of these motions is presented in turn and debated as per the rules of formal debate.



ONTARIO ASSOCIATION OF ARCHITECTS
Council Meeting of December 10, 2021 at approx. 11:00 a.m.

Meeting # 278

OPEN MEETING AGENDA

Recognition of Traditional Lands

- | | | |
|---------|---|-----------------------------|
| 4 mins | 1.0 AGENDA APPROVAL | |
| 1 min | 1.1 Declaration re. Conflict of Interest | |
| | 2.0 APPROVAL OF MINUTES | |
| 4 mins | 2.1 Draft minutes of the November 4, 2021 Open Council Meeting (<i>see attached</i>) | |
| 2 mins | 3.0 BUSINESS ARISING FROM THE MINUTES | |
| | 4.0 ITEMS FOR REVIEW AND APPROVAL | |
| 10 mins | 4.1 Appointments to Statutory Committees | Vice President
Hastings |
| | 4.1.a Complaints Committee (<i>oral</i>) | |
| | 4.1.b Discipline Committee (<i>oral</i>) | |
| | 4.1.c Experience Requirements Committee (<i>oral</i>) | |
| | 4.1.d Registration Committee (<i>oral</i>) | |
| 10 mins | 4.2 Appointments to Committees under the Practice Portfolio | Vice President
Vilardi |
| | 4.2.a Practice Resource Committee (<i>oral</i>) | |
| | 4.2.b Practice Review Committee (<i>oral</i>) | |
| | 4.2.c Sub-committee on Building Codes and Regulations (SCOBCAR) (<i>oral</i>) | |
| 5 mins | 4.3 Appointments to the Policy Advocacy Coordination Team (PACT) (<i>oral</i>) | Vice President
Schuhmann |
| 3 mins | 4.4 Appointments to the Communications Committee (<i>oral</i>) | Vice President
King |
| 3 mins | 4.5 Appointments to the Interns Committee (<i>oral</i>) | Councillor Abu-
Bakare |
| 15 mins | 4.6 New Annual OAA Scholarship's - Terms of Reference (<i>see attached</i>) | Working Group |
| 15 mins | 4.7 Interns Committee –Final Report re. Research on Challenges faced by Interns (<i>see attached</i>) | Councilor Abu-
Bakare |
| 15 mins | 4.8 Report on Equity, Diversity and Inclusion Mandatory learning under the OAA's Continuing Education Program and Consideration of other additional mandatory learning for Next Cycle (<i>see attached</i>) | Vice President
Krickhan |
| 10 mins | 4.9 OAA Conference 2022 – Keynote Speaker (<i>see attached</i>) | Vice President
King |
| 10 mins | 4.10 Policy re. Creation of New OAA Awards (<i>see attached</i>) | Vice President
King |
| 10 mins | 4.11 OAA Submission to Ministry of Municipal Affairs and Housing (MMAH) Code Consultation (<i>TBD</i>) | Vice President
Vilardi |
| 5 mins | 4.12 Appointments to Council (<i>oral</i>) | Registrar |

Open Council Agenda

- City of Toronto (3 year term seat & 1 year term seat)
- Eastern District
- Western District

10 mins	4.13	Modernization of Complaints Committee Process (<i>see attached</i>)	Vice President Hastings
10 mins	4.14	OAA Building Committee – Building Reserve Fund Study (<i>see attached</i>)	OAA Building Committee
10 mins	4.15	Update to Council Policy – Naming a Certificate of Practice (<i>see attached</i>)	Registrar

5.0 ITEMS FOR DISCUSSION

6.0 EXECUTIVE COMMITTEE REPORTS

	6.1	Report from the President	
3 mins	6.1.a	Activities for the months of November-December (<i>see attached</i>)	President
3 mins	6.1.b	Report from Executive Director (<i>see attached</i>)	Executive Director
	6.2	Report from the Senior Vice President and Treasurer	SVP & Treasurer
	6.3	Report from Vice President Strategic	
7 mins	6.3.a	Report from Vice President Strategic (<i>see attached</i>)	Vice President Schuhmann
	6.4	Report from Vice President Communications	
7 mins	6.4.a	Report from the Vice President Communications (<i>see attached</i>)	Vice President King
	6.5	Report from Vice President Regulatory	Vice President Hastings
7 mins	6.5.a	Activities Report from the Registrar (<i>see attached</i>)	Registrar
	6.6	Report from Vice President Practice	
7 mins	6.6.a	Report from Vice President Practice (<i>see attached</i>)	Vice President Vilardi
	6.7	Report from Vice President Education	
7 mins	6.7.a	Report from Vice President Education and Comprehensive Education Committee (<i>TBD</i>)	Vice President Krickhan
	6.8	Report from Immediate Past President	Immediate Past President Kurtin
5 mins	6.8.a	Governance Committee Update (<i>see attached</i>)	

7.0 ITEMS FOR INFORMATION

5 mins	7.1	Canadian Architectural Licensing Authorities (CALA) – November 5, 2021 Meeting of the Regulators (<i>see attached</i>)	Executive Director
2 mins	7.2	Society Updates and 2021 Fall President's Tour (<i>oral</i>)	President

8.0 OTHER BUSINESS

9.0 DATE OF NEXT MEETING

9.1 The next regular meeting of Council is Thursday January 20, 2022 at 9:30 a.m. via Zoom.

10.0 ADJOURNMENT

Ontario Association of Architects

Meeting #277 Open

MINUTES

November 4, 2021

The two hundred and seventy seventh meeting of the Council of the Ontario Association of Architects, held under the *Architects Act*, took place on Thursday November 4, 2021 via Zoom.

Present:	Susan Spiegel	President
	Agata Mancini	Senior Vice President & Treasurer
	Paul Hastings	Vice President Regulatory
	Jennifer King	Vice President Communications
	Natasha Krickhan	Vice President Education
	Kathleen Kurtin	Immediate Past President
	Kristiana Schuhmann	Vice President Strategic
	Settimo Vilardi	Vice President Practice
	Farida Abu-Bakare	Councillor
	J. William Birdsell	Councillor
	Barry Cline	Councillor
	J. Gordon Erskine	Councillor
	Jeffrey Laberge	Councillor (<i>part attendance</i>)
	Lara McKendrick	Councillor
	Elaine Mintz	Lieutenant Governor in Council Appointee
	Deo Paquette	Councillor
	Gaganjot Singh	Lieutenant Governor in Council Appointee
	Andrew Thomson	Councillor (<i>part attendance</i>)
	Kristi Doyle	Executive Director
	Christie Mills	Registrar
	Tina Carfa	Executive Assistant, Executive Services
	Erik Missio	Manager, Communications (<i>part attendance</i>)
Regrets:	Heather Breeze	Councillor
	Michelle Longlade	Lieutenant Governor in Council Appointee
Guests:	Mélisa Audet	Manager, Practice Advisory Services
	Andrew Davies	Executive Director, No.9 (<i>part attendance</i>)
	Adam Tracey	Manager, Policy & Government Relations
	Sara Trotta	Policy Analyst

The President called the meeting to order at 11:45 a.m.

The President noted a land acknowledgement video from the Waterloo Region District School Board would be shared with Council as an acknowledgement and recognition of the indigenous land and its people.

DECLARATION RE CONFLICT OF INTEREST

The President called for declaration of any conflicts of interest.

No conflicts of interest were declared.

AGENDA APPROVAL

9282. The President noted that the following items would be added to the agenda.

- 8.1 December In-person Council Meeting (*oral*)
- 8.2 Amendment to Schedule A, OAA By-laws

It was moved by Cline and seconded by Birdsell that the agenda for the November 4, 2021 open meeting be approved as amended.

-- CARRIED

APPROVAL OF MINUTES

9283. *Reference Material Reviewed:* Draft minutes of the September 23, 2021 Open Council meeting.

The draft minutes of the September 23, 2021 Open Council meeting were reviewed.

It was moved by Paquette and seconded by Abu-Bakare that the minutes of the September 23, 2021 Open Council meeting be approved as circulated.

-- CARRIED

BUSINESS ARISING FROM THE MINUTES

9284. There was no business arising from the minutes.

Council broke for lunch at 11:55am and resumed at 1:00 p.m.

ITEMS FOR REVIEW AND APPROVAL

9285. *Reference Material Reviewed:* Memorandum from the Budget Committee dated October 26, 2021 re. Draft Budget 2022 and attached supporting documentation. **(APPENDIX 'A')**

The Senior Vice President and Treasurer reported that the Budget Committee is proposing a 3.7% fee increase which aligns with the current cost of living. The Conference budget is included adding that the general operating budget will be required to subsidize the conference by approximately \$300,000. The numbers are based on 400 attendees at conference though it may increase depending on the lifting of COVID restrictions in future.

It was noted by the Senior Vice President and Treasurer that the budget for the Governance Committee has increased as a result of next steps required from the Operational Review. It is expected that \$154,000 will be allocated to the major capital reserve in accordance with the Reserve Fund Study Pending the outcome of the final report on the reserve fund study to be reported in December that amount may change

Doyle noted that under CACB, the per capita amount was reported at the 2021 amount, however, their annual budget for 2022 was recently received and the contribution will in fact be lower, reducing it to \$20,000. It was suggested however that an additional \$10,000 be carried to cover costs associated with the National CACB Validation Conference.

It was noted by Doyle that the Equity, Diversity & Inclusion and Truth and Reconciliation Review Working Group has made a recommendation to establish two new scholarships for each of the five schools of architecture and will add \$25,000 to that line item. .

A member of Council requested some clarification with the recommendation to increase fees following the pandemic and its effects from the past year.

A member of the Budget Committee responded that it is necessary to put forward the increase in order to keep pace. Last year was different due to the pandemic and there was no increase in fees as a result. Council should be committed to an ongoing increase to align with the cost of living.

It was moved by Erskine and seconded by McKendrick that an increase of 3.7% to fees for 2022 be approved.

-- CARRIED (3 opposed (Birdsell))

It was moved by Mancini and seconded by Erskine that the 2022 OAA General Operating and Capital Budgets be approved as amended.

-- CARRIED (1 abstention, 1 opposed (Birdsell))

9286. Lieutenant Governor in Council Appointee (LGIC) – Committee Appointments (*oral*)

Doyle reported that the new LGIC has not yet been appointed and is currently with Cabinet awaiting approval.

It is being recommended that current LGICs Elaine Mintz and Michelle Longlade be temporarily appointed respectively to Audit Committee and Complaints Committee until the appointment of the new LGIC is finalized.

It was moved by Laberge and seconded by Krickhan that Lieutenant Governor in Council appointee Elaine Mintz be appointed to the OAA Audit Committee until such time that the position be filled by a newly appointed Lieutenant Governor in Council appointee.

-- CARRIED (1 abstention)

It was moved by Laberge and seconded by Kurtin that Lieutenant Governor in Council appointee Michelle Longlade be removed from Discipline Committee and appointed to Complaints Committee until such time that the position be filled by a newly appointed Lieutenant Governor in Council appointee.

-- CARRIED

9287. Audit Committee Appointment (*oral*)

The Senior Vice President and Treasurer reported that the recommendation is to appoint past President, John Stephenson to the Audit Committee as he has demonstrated significant experience with Council, in particular in the capacity of past Senior Vice President and Treasurer.

It was moved by Mancini and seconded by Erskine that John Stephenson be appointed to the OAA Audit Committee for a two-year term effective immediately.

-- CARRIED

9288. *Reference Material Reviewed:* Memorandum from Vice President Regulatory, Paul Hastings dated October 20, 2021 re. Appointment of Life Members. **(APPENDIX 'B')**

The Vice President Regulatory reported the names of the members to be appointed to the status of life members.

It was moved by Hastings and seconded by Mintz that the following architects be appointed as Life Members:

Angelo D. Albergo
Juan Ania Blecua
Joseph A. Bogdan
Stephen J-S Chang
Basil J. Edmundson
Steven M. Eskin
John Farrugia
Adel Iskandar
James W. King

Mel M. Mekinda
David K. Mesbur
Richard Morrison
Laszlo I. Nemeth
K.S. Patkar
Ciro Polsinelli
Kalina Serlin
Bijaya B. Shrestha
Michael B. Summers

Christopher Knowles
Donald J. Loucks
Brian C. McKibbin
-- CARRIED

Jacek Vogel
James M. Wright
Mario J. Zirone

9289. *Reference Material Reviewed:* Memorandum from Vice President Regulatory, Paul Hastings dated October 20, 2021 re. Recognition of Architects of Long Standing. **(APPENDIX 'C')**

The Vice President Regulatory reported the names of the members to be recognized as Long Standing.

It was moved by Hastings and seconded by Krickhan that the following architects be recognized as members of long standing:

E. George Kneider
Leonard Sedun
Tonu Altosaar
Roger E. Fennell

Desmond Roychauduri
Medhat Abdou
Louis E.J. Cooke
Allan J. Stone

-- CARRIED

9290. *Reference Material Reviewed:* Memorandum from the Governance Committee dated October 19, 2021 re. Eligibility Requirements for Officers/Executive Committee of Council Policy and attached background information. **(APPENDIX 'D')**

The Immediate Past President reported that the Governance Committee has considered the direction given by Council to consider requirements for Executive Committee candidacy. The policy for consideration takes into account the importance of understanding the roles and mandate of Council by incorporating the requirement to have minimum 1 year experience on Council or an OAA committee. In addition, it is mandatory that the President and Senior Vice President and Treasurer be a licensed architect.

A member of Council requested some clarification that the requirement for President or Senior Vice President and Treasurer to be an architect implies that the position cannot be held by a Licensed Technologist OAA (Lic.Tech.OAA).

The Immediate Past President confirmed that the intent is that the positions may only be filled by an architect.

It was suggested by a Council member that the policy be amended such that LGICs be permitted to vote for candidates in the election of officers.

Mills noted that further to the regulations, LGICs are not permitted to cast a vote for Executive Committee since they are not elected members, however it could be considered in the context of modernization of the legislation.

A member of Council requested clarification for the reason that the Senior Vice President and Treasurer must be an architect.

The Immediate Past President responded that the Senior Vice President and Treasurer may be called on to perform the President's duties in their absence and in general the succession is often such that the SVP & Treasurer will eventually run for President

A Council member suggested that the eligibility requirements be amended to include experience served on the executive for an architectural society.

It was suggested by a member of Council that the policy appears to create different levels of class for members which may be problematic

The Immediate Past President responded that the policy addresses levels of responsibility in the profession and scope of practice as opposed to class..

Missio joined the meeting at 1:50 p.m.

It was suggested by a member of Council that the policy should be presented at the AGM to lend a voice to the membership.

It was moved by Kurtin and seconded by Paquette that the policy 'Eligibility Requirements for Officers/Executive Committee of Council' be approved as amended to include experience as Society Executive in order to be eligible for Executive Committee.

-- CARRIED (5 opposed (King, Mancini))

9291. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated October 21, 2021 re. No. 9 – "Imagining My Sustainable City" and attached supporting documentation.
(APPENDIX 'E')

Davies joined the meeting at 1:55 p.m.

The President welcomed Davies to the meeting.

Davies presented an update on the IMSC program to Council, noting that the program has been operating for over 10 years and delivered to 4,500 students. The program aspires to encouraging youth to lead the development of sustainable communities. The program's purpose is to empower the next generation and give them the tools to develop such communities.

A member of Council enquired as to the method by which students are selected for participation in the program.

Davies responded that No. 9 works with the school boards to identify schools in need of assistance. It was noted by Davies that in Peel Region, they are working with an architectural educator which they found to be beneficial.

A member of Council enquired as to whether there are architectural educators in the program. Further clarification with respect to access to the publications was requested.

Davies responded that the core staff have an architectural background and No. 9 has been bringing on other educators. The workbook is only offered once entering the class to maintain its integrity.

It was suggested by the Council member that as part of sharing the videos highlighting architecture, the names and background of the architects be recognized and shared with the students. Additionally, some projects may be further enhanced with the inclusion of Indigenous elders in the design element. An honorarium for architects and elders may also be an initiative to consider.

A member of Council suggested that Davies may wish to consider developing a presentation on the program at the next OAA Conference.

The President thanked Davies for the presentation.

Davies left the meeting at 2:20 p.m.

It was moved by Krickhan and seconded by Laberge that Council approve the funding of the No.9 – Imagining My Sustainable City Project for 2021 in the amount of \$25,000 to be drawn from the 2021 policy contingency budget.

-- CARRIED (1 abstention, 1 opposed)

9292. *Reference Material Reviewed:* Memorandum from the Equity, Diversity, Inclusion | Truth & Reconciliation Report Working Group dated October 27, 2021 re. Final Report from Equity, Diversity, Inclusion | Truth & Reconciliation Working Group and Working Group Sunset and attached background information. **(APPENDIX 'F')**

The President reported on the final recommendations of the Working Group and requested that it be sunset with completion of the work tasked to it.

It was moved by Kurtin and seconded by Laberge that the following recommendation be added to the approved list of Working Group recommendations such that, *Effective immediately, the Annual Report shall include an update on the Equity, Diversity and Inclusion initiatives at the OAA.*

-- CARRIED (1 abstention)

It was moved by Kurtin and seconded by Vilardi that Council approve the creation of two new annual scholarships under the OAA's existing scholarship program for students enrolled in each of the 5 Ontario Schools of Architecture; that the amount of these scholarships be set at \$2,500 each for a total of \$25,000 to be added to the OAA's annual scholarship budget effective 2022; and, that the full details for the scholarships be brought forward to the December meeting of Council for final approval.

-- CARRIED (1 opposed)

It was moved by Kurtin and seconded by Mintz that the Equity, Diversity and Inclusion | Truth and Reconciliation Working Group be sunset effective November 4, 2021.

-- CARRIED

9293. Appointment of Representative to University of Toronto, John H. Daniels Faculty of Architecture, Landscape and Design School Curriculum Committee (*oral*)

Doyle reported that four applications were received for the position as OAA representative on the Curriculum Committee.

It was moved by Schuhmann and seconded by Krickhan that Council approve the appointment of Hadi Khouzam as OAA representative on the University of Toronto, John H. Daniels Faculty of Architect, Landscape and Design School Curriculum Committee for a three year term, effective immediately

-- CARRIED

9294. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated October 15, 2021 re. Appointments to the Canadian Architectural Certification Board (CACB) and attached background information. **(APPENDIX 'G')**

Doyle reported on the recommendations for appointment to the CACB Board from the National CACB Standing Committee.

It was moved by Birdsell and seconded by Laberge that Council approve the recommendation of the National CACB Standing Committee to appoint Rob Bateman to the CACB Board as the CALA representative; and, Robert Mellin to the CACB Board as the joint CALA/CCUSA representative.

-- CARRIED

9295. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated October 26, 2021 re. OAA Policy re. Mandatory COVID-19 Vaccination and attached supporting documentation. **(APPENDIX 'H')**

Doyle reported that the proposed policy is a result of review by the Manager, Human Resources and the Governance Committee as well, feedback from the OAA staff survey was taken into consideration.

It was noted by Doyle that the office remains closed adding that a return to office transition schedule will be presented at the December meeting of Council. How meetings will be conducted in the New Year will be dependent on the comfort level of the attendees.

There was some suggestion that a December meeting be held with a committee as an experiment in process. Doyle suggested that Council may wish to consider the transition report in December before moving forward with opening the building.

It was moved by Kurtin and seconded by Laberge that Council approve the policy 'Mandatory COVID-19 Vaccination' and that it be implemented immediately.

-- CARRIED (2 abstentions)

9296. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated October 27, 2021 re. Canadian Architectural Certification Board (CACB) Annual Budget 2022 and attached supporting documentation. **(APPENDIX 'I')**

Doyle reported that the CACB 2022 Budget will require a lower per capita contribution from each of the CALA jurisdictions as compared to last year.

A member of Council enquired as to consideration to budget for further marketing of the BEFA program for foreign-trained professionals for 2022.

Doyle responded that the Broadly Experienced Foreign Architects (BEFA) program through CACB is awaiting confirmation of government funding through a grant which explains why there is no amount in the budget for it at this time in terms of marketing.

It was moved by Hastings and seconded by Vilardi that Council approve the draft Canadian Architectural Certification Board (CACB) 2022 Budget, dated October 20, 2021.

-- CARRIED

ITEMS FOR DISCUSSION

9297. There were no items for discussion.

EXECUTIVE COMMITTEE REPORTS

9298. *Reference Material Reviewed:* Activities for the months of September-November. **(APPENDIX 'J')**

The report was noted for information.

9299. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated October 26, 2021 re. Update on Activities of the Executive Director. **(APPENDIX 'K')**

The report was noted for information.

9300. *Reference Material Reviewed:* Memorandum from Vice President Strategic, Kristiana Schuhmann dated October 22, 2021 re. Update on activities under the Vice President Strategic portfolio. **(APPENDIX 'L')**

The Vice President Strategic reported on activities under the portfolio. Staff Adam Tracey and Sara Trotta were thanked for the significant work undertaken on the World Architecture Day Queen's Park Picks project.

The President shared a presentation with Council on the University of Toronto Long Term Care (LTC) Facilities Study. It was noted that the 27 recommendations which stemmed from the LTC Roundtable will dovetail into the study's work.

Tracey noted that in recent discussions with MPPs, it was apparent that the issue of LTC is priority issue for the government. The next provincial election will be held in June 2022 the study is making all attempts to shorten the timelines to finalize in advance of that date.

It was noted by the President that Phase 1 is almost complete with the research in place. For Phase 2, there will be a LTC assessment and white paper development.

The Vice President Strategic acknowledged that school timelines also need to be considered in the study's progress.

Trotta noted the study is targeting the creation of 25-50 design guidelines.

A Council member enquired as to whether a cost estimator will be included in the study's recommendations.

A member of Council responded that the market is currently experiencing huge fluctuations in costs and a cost estimator should be deferred or even eliminated until there is market stability. It was additionally suggested that a discussion of capital cost may not be considered constructive for a Best Practice.

It was suggested by a Council member that for Phase 1, site planning is important would be beneficial to include pre-planning and site location with a solution on how to integrate into the community.

Trotta responded that it is being included in the study though a request to be more specific may be made to the team.

The report was noted for information.

9301. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated October 22, 2021 re. Update on Appeal of Harmonized Zoning By-law. **(APPENDIX 'M')**

The report was noted for information.

9302. *Reference Material Reviewed:* Memorandum from Vice President Strategic, Kristiana Schuhmann dated October 22, 2021 re. Post event debrief on World Architecture Day and attached background information. **(APPENDIX 'N')**

The Vice President Strategic reported.

The report was noted for information.

9303. *Reference Material Reviewed:* Memorandum from the Communications Committee dated October 26, 2021 re. Communications Committee Update and attached background information. **(APPENDIX 'O')**

The Vice President Communications reported.

A request for recommendations for potential jury members for the Design Excellence Award was requested by the Vice President Communications. Suggestions from Council should be submitted by Monday November 15.

The report was noted for information.

9304. *Reference Material Reviewed:* Memorandum from Vice President Regulatory, Paul Hastings and Registrar, Christie Mills dated October 26, 2021 re. Activities under the Registrar September 9, 2021 – October 20, 2021 and attached background information. **(APPENDIX 'P')**

The Vice President Regulatory reported that the Office of the Registrar is active in the area of act enforcement and diligently following up on reported cases.

The report was noted for information.

9305. *Reference Material Reviewed:* Memorandum from Councillor and Chair, Farida Abu-Bakare dated November 4, 2021 re. Interns Committee Update. **(APPENDIX 'Q')**

Councillor Abu-Bakare reported the recent virtual event 'Meet the OAA' was successful and well attended.

It was noted by Abu-Bakare that the final report on the interns' title will be presented to Council at the December meeting.

It was noted by a member of Council that the American Institute of Architects (AIA) is now calling interns "architectural associate" and "design professional".

The report was noted for information.

9306. *Reference Material Reviewed:* Memorandum from Vice President Practice, Settimo Vilardi dated October 21, 2021 re. Report from Vice President Practice. **(APPENDIX 'R')**

The Vice President Practice reported that the CCDC 2 supplementary conditions have now been officially issued and are available to the membership. Document 600 is currently in its final stage of development.

It was noted by the Vice President Practice that the Ministry of Municipal Affairs and Housing (MMAH) has shared a proposal for 850 code changes with feedback requested by December 2. The review is currently ongoing through the Sub-committee on Building Codes and Regulations (SCOBCAR).

A Council member enquired if there are statistics available to breakdown the nature of the calls to Practice Advisory Services (PAS).

Audet responded that PAS is undertaking more research in that area adding that there will be a detailed report to Council at the January meeting.

Clarification was requested by a member of Council as to an estimate on the implementation date for the code changes and an accompanying education piece to accompany it.

The Vice President Practice responded that implementation is expected sometime in 2022. Doyle added that in discussion with James Ross of MMAH, it was confirmed that there will be another consultation in the spring adding that the earliest date of implementation would be in fall 2022.

A Council member enquired as to whether there is a timeline for the amalgamation of the Ontario Building Code (OBC) and National Building Code (NBC).

Doyle noted that staff would follow up for clarification from Ross who is willing to meet for a more focused discussion. It is not imminent though the government is working on it.

The report was noted for information.

9307. *Reference Material Reviewed:* Memorandum from the Vice President Education, Natasha Krickhan dated October 27, 2021 re. Report from Vice President Education. **(APPENDIX 'S')**

The Vice President Education reported that work is progressing on the dashboard for public education and expressed appreciation to Communications for their work on the project.

A request for feedback from Council was requested by the Vice President Education on sustainable Continuing Education offerings for Conference.

The report was noted for information.

9308. *Reference Material Reviewed:* Memorandum from the Building Committee dated October 26, 2021 re. Update from OAA Building Committee and attached background information. **(APPENDIX 'T')**

The Immediate Past President reported that a report on the Building Reserve Fund Study will be presented at the December meeting of Council.

It was suggested by a member of Council that as an alternative to a Building Headquarters tour that a podcast be considered.

The report was noted for information.

ITEMS FOR INFORMATION

9309. *Reference Material Reviewed:* Ontario Association for Applied Architectural Sciences (OAAAS) Report to OAA Council – November 2021 **(APPENDIX 'U')**

The update was noted for information.

9310. Society Updates and 2021 Fall President's Tour *(oral)*

The President reported that pre-meetings with the Society Chairs have been held in advance of the virtual visits to review the new format as well as a few visits have been completed. The agendas have been developed with a focus on climate education. Conference staff have been contacted to consider content ideas for Conference. Additionally, case studies are being posted on the sustainable webpage.

The update was noted for information.

OTHER BUSINESS

9311. December In-person Council Meeting *(oral)*

This item was reported under minute number 9295.

9312. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated November 1, 2021 re. Proposed Amendments to OAA By-Laws – Schedule A and attached background information. **(APPENDIX 'V')**

Doyle reported that with the approval of the 2022 Budget which included a fee increase, an amendment to the current Schedule A of the OAA By-laws is required to reflect the change in fees for 2022.

It was moved by McKendrick and seconded by Cline that Schedule A to the OAA Bylaws be approved as circulated reflecting and increase in fees of 3.7%.

-- CARRIED (1 opposed)

A member of Council reminded Councillors of the OAA membership with the Institute of Corporate Directors (ICD) and encouraged use of its offerings. The Governance Committee will be reviewing the membership and how to make the best use of it.

A member of Council requested an update as to the recent Council election nomination results.

Mills noted in the results of the nomination period included seats requiring election, acclaimed seats and vacant seats. There will be an election for the Province of Ontario seat and the Intern Architect Non-Voting seat.

Mills noted for the City of Toronto, the two seats are acclaimed and thus this precludes an election for these seats; as set out in out in s.7 and s.8 of the Regulation. Council will need to consider and make appointments to the available three-year term seat and the one-year term seat. Both candidates have been asked to submit their term preference.

Mills noted the Eastern electoral district received no eligible candidates nor interest as of the close of nominations October 25, 2021. By way of background, in the 2017, there were no eligible candidates for the 2018 Council Eastern District seat. At that time, expressions of interest were solicited from Eastern District members. In the December 2017 meeting Council made an appointment to the Eastern District seat based on the submissions received. The same process has been initiated for this year.

Mills noted the Western electoral district seat received no nominations, however, there are several eligible candidates within the Province of Ontario election. Given that there will be eligible and interested candidates after the Province of Ontario seat is voted upon it is recommended that Council appoint the Western District seat from the eligible candidates remaining. Ballot counts will be made available to assist in the appointment process.

It was suggested by a member of Council that the seat remain vacant until the next election.

Mills indicated that it is incumbent upon Council to fill vacant seats. The requirements related to Council vacancies are set out in the *Architects Act* s.3(10 - 11); s.3(11.1) is particular to election vacancies. The methods are set out but this typically is undertaken via a process of appointment. Regulation s.2(2) further sets out the specific districts and the required number of seats for each district.

The Council member suggested that if quorum is met then there is no requirement to fill the seats.

A member of Council suggested that since those members have expressed interest, they should be considered. With a fewer number of Councillors, there would be a resultant increase in the workload for each Councillor.

Doyle recalled that Council executed a mechanism in a 2010 *Act* revision to fill seats to facilitate a lighter workload.

It was noted by a Council member that Council had reviewed its strengths and weaknesses and now has an opportunity to select a candidate suitable for the role.

DATE OF NEXT MEETING

9313. The next regular meeting of Council is Friday December 10, 2021 at 9:30 a.m. via Zoom.

ADJOURNMENT

9314. **It was moved by Vilardi and seconded by King that the meeting be adjourned at 4:02 p.m.**
-- CARRIED UNANIMOUSLY

President

Date

DRAFT

Memorandum

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 4.6

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Equity, Diversity, Inclusion | Truth & Reconciliation Working Group

Susan Speigel, President
Kathleen Kurtin, Immediate Past President
Gaganjot Singh, Lieutenant Governor in Council Appointee
Farida Abu-Bakare, Councillor

Date: November 26, 2021

Subject: New Scholarship Awards Update from Equity, Diversity & Inclusion and Truth & Reconciliation Report Working Group

Objective: To review and approve the terms of reference for two new student scholarships for the 5 University Schools of Architecture.

Though the Working Group was approved to be sunset immediately at the November 4 Council meeting, the WG did commit to define the Terms of Reference for the new scholarship awards approved at that same Council meeting. The new scholarship award entitled *Exceptional Leadership Through Design Excellence: Equity, Diversity & Inclusion (EDI) and Truth & Reconciliation* is set to commence during the upcoming 2022 scholarship/award season. It was determined that the scholarship would be similar to the existing *Exceptional Leadership Through Design Excellence: Sustainability* scholarship awards in that the OAA will provide two annual scholarships to each of the 5 schools of architecture in Ontario, in the amount of \$2500 each to be awarded to two (2) individual students in any year of the undergraduate or graduate programs (and it will be at the discretion of the school how the awards are to be allocated).

This new award, entitled **Exceptional Leadership Through Design Excellence: Equity, Diversity & Inclusion (EDI) and Truth & Reconciliation** is, as the title implies, intended to recognize exceptional leadership through design excellence combined with exemplary approaches to projects and/or

assignments as they relate to Equity, Diversity and Inclusion (EDI) and Truth and Reconciliation, respectively.

Whilst the OAA gives the schools of architecture the flexibility to administer the scholarships, this specific criterion will be reviewed on an annual basis by the Education Committee prior to the start of the academic year.

Upon review of the Criteria for Disbursement of Scholarship Awards, and in review of the **Exceptional Leadership Through Design Excellence: Sustainability** scholarship award, the WG wishes to ask Council to consider an increase in the award amount allocation for these existing awards, so as to match this new scholarship. Currently, the Sustainability award is given to the five schools of architecture (two awards at \$2000 each). This scholarship award amount has not increased in many years and the WG is suggesting Council increase each award by \$500 for a total annual increase of \$5,000. Each *Exceptional Leadership Through Design Excellence: Sustainability* scholarship award will now be worth \$2500. Further explanation on this increase in award scholarship disbursement is included as an attachment to this memorandum.

Action: Council is asked to consider the following motions:

It was moved ... and seconded... that the Terms of Reference for the Exceptional Leadership Through Design Excellence: Equity, Diversity & Inclusion (EDI) and Truth & Reconciliation be approved as presented to Council at the December 10, 2021 meeting.

It was moved ... and seconded... that Council approve an increase in the scholarship award amount for the Exceptional Leadership Through Design Excellence: Sustainability from \$2000 each to \$2500.

Attachments: Criteria for Disbursement for Scholarship Awards – revised Nov 2021

OAA Trust Fund

Criteria and Procedures for the Disbursement of annual awards

OAA Scholarships to Educational Facilities

Exceptional Leadership Through Design Excellence: Sustainability

Direction is given to the Manager, Finance to prepare and send a cheque to the following schools, for the following amounts upon approval of the procedures for disbursement by the Education Committee for the following academic year and upon receipt of notice from the school as to the winners of the OAA Scholarships.

University of Toronto	Two scholarships of \$2,500 each.
Carleton University	Two scholarships of \$2,500 each
University of Waterloo	Two scholarships of \$2,500 each
Ryerson University	Two scholarships of \$2,500 each
Laurentian University	Two scholarships of \$2,500 each
RAIC Syllabus	One Grant of \$2,000
Ontario College of Art	One scholarship of \$2,000

The OAA provides two annual scholarships in the amount of \$2,500 each to be awarded to two (2) individual students in any year of the undergraduate program (one (1) at \$2,000 in the case of OCAD). **The scholarships are intended to recognize exceptional leadership through design excellence combined with innovative approaches to sustainability in an assignment or project.**

Beginning with the 2020 academic year the scholarships should be awarded to the students who have best demonstrated design excellence involving exemplary responses to the climate crisis in a project or assignment. This specific criterion will be reviewed on an annual basis by the Education Committee prior to the start of the academic year.

Exceptional Leadership Through Design Excellence: Equity, Diversity & Inclusion (EDI) and Truth & Reconciliation

Direction is given to the Manager, Finance to prepare and send a cheque to the following schools, for the following amounts upon approval of the procedures for disbursement by the Education Committee for the following academic year and upon receipt of notice from the school as to the winners of the OAA Scholarships.

University of Toronto	Two scholarships of \$2,500 each.
Carleton University	Two scholarships of \$2,500 each
University of Waterloo	Two scholarships of \$2,500 each
Ryerson University	Two scholarships of \$2,500 each
Laurentian University	Two scholarships of \$2,500 each

The OAA provides two annual scholarships in the amount of \$2,500 each to be awarded to two (2) individual students in any year of the undergraduate or graduate programs (it is at the discretion of the school how the awards are to be allocated). **The scholarships are intended to recognize exceptional leadership through design excellence combined with exemplary approaches to projects and/or assignments as they relate to Equity, Diversity & Inclusion (EDI) and Truth and Reconciliation, respectively.**

Beginning with the 2022 academic year the scholarships should be awarded to the students who have best demonstrated design excellence involving innovative responses to both Equity, Diversity & Inclusion (EDI) and Truth & Reconciliation. This specific criterion will be reviewed on an annual basis by the Education Committee prior to the start of the academic year.

Memorandum

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 4.7

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Farida Abu-Bakare, Chair of the Interns Committee
Heather Breeze, Intern Representative on Council

Date: December 10, 2021

Subject: Interns Committee Comprehensive Research Report

Objective: To approve the proposed recommendations outlined in the Interns Committee Comprehensive Research Report

The Interns Committee has concluded its research on investigating the landscape of architectural internship in Ontario specifically addressing the challenges faced by Intern Architects. The three key documents assessed as part of the research include the OAA Membership Survey (2019), Roundtable on Equity, Diversity and Inclusion (2020) and the Intern Title Survey (2020).

The three major themes were professional challenges, IAP challenges and job opportunities & networking. The report outlined key issues, provides a comparative analysis and proposed recommendations.

The recommendations encompass opportunities for the OAA to create change and alternative suggestions for improved community engagement and data collection. The recommendations proposed by the Interns Committee include:

1. Publish the report to the entire OAA membership.
2. Devise a system of tracking all recommendations and action items carried.
3. Develop a calendar and list of priorities that include events and other resources specifically pertaining to Intern Architects

4. Develop a series of continuing education webinars that provide architects with more information and perspective regarding the IAP and the experience of Intern Architects.
5. Further investigate and develop opportunities to encourage higher numbers of female-identifying and minority members of the OAA to engage in mentorship in the IAP.
6. The OAA to take stronger action on pushing for exemption under the *Employment Standards Act (2000)*.
7. Council to commit to changing the title "Intern Architect" and commit to funding and/resources to further study appropriate alternatives

Action: Council to review and approve the recommendations proposed within the Interns Committee Comprehensive Research Report.

Attachments: (1) Interns Committee Comprehensive Research Report
(2) Appendix II: Recommendations

Interns Committee

Comprehensive Research Report

Investigating the landscape of architectural internship in Ontario

November 2021



Ontario Association
of Architects

About the Ontario Association of Architects

The Ontario Association of Architects (OAA) is a self-regulating organization governed by the *Architects Act*, a statute of the Government of Ontario. Dedicated to serving and protecting the public interest, the OAA administers the Act while promoting and increasing the knowledge, skill, and proficiency of its members.

Vision

An Ontario in which architects are valued contributors to society, by creating a safe and healthy built environment that performs at the highest levels and elevates the human spirit.

Mission

To serve the public interest through the regulation, support, and promotion of the profession of architecture in Ontario.

Mandate

To regulate and govern the practice of architecture in Ontario in the service and protection of the public interest in accordance with the Architects Act, its Regulations and By-laws; to develop and uphold standards of skill, knowledge, qualification, practice, and professional ethics among architects; and to promote the appreciation of architecture within the broader society.

OAA Composition

OAA membership comprises the Architects and Licensed Technologists OAA able to practise in Ontario. Other groups holding status with the Association include those on the path to licensure such as Intern Architects and Student Associates, and those retired from the profession.

OAA community as of September 8, 2021:

4468	Architect
46	Architect Non Practising
49	Architect on Leave
31	Architect Long Standing
278	Retired Member Status
336	Life Member Status
146	Lic. Tech. OAA
69	Temporary Licence
1890	Intern Architect
6	Intern Architect on Leave
565	Student Associate
294	Technologist OAAAS

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Current Initiatives

Interns Committee

During the course of this research and assembly of this report, the Interns Committee were undertaking a number of initiatives and projects intended to address challenges specific to Intern Architects. These include both data- and knowledge-gathering projects to help learn more about the current issues and facing Interns, as well as internally-facing projects as responses.

- **2021 Mentorship Survey:** In late 2021 a survey was undertaken to collect feedback from mentees and mentors on their experiences and suggestions for improving the mentorship portion of the Internship in Architecture Program. This will inform best practices and systemic changes, moving forward including connecting mentees and mentors, and investigating the creation of a platform for communication between members.
- **Mentorship Guide:** In 2021 the OAA published a pamphlet for mentees and mentors containing best practices for the mentor-mentee relationship, detailed information on the mentorship portion of the IAP.
- **Mentorship panel in the 2021 OAA conference:** Moderated by the Intern Architect Representative for the 2021 Council, the panel was composed of two mentees and two mentors reflecting on their experiences, and offering advice for those looking to get involved as mentors, or mentees looking to connect with a mentor.

This report was compiled in such a way to reflect the working model of the OAA's data collection and resource response, to both acknowledge the positive work completed in the past and currently underway, and to highlight the gaps that still exist.

Professional Resources

In addition to the initiatives currently underway by the Interns Committee, there are current and past initiatives undertaken and resources created by other Committees and staff within the OAA that are targeted to or beneficial for Intern Architects. For instance, the OAA recognizes that connection to employment resources and opportunities is one of the first and most common challenges an Intern Architect will face, and has built up a network of resources to help support Interns on their path to licensure. Below is a brief overview of the programs the OAA currently provides to support job seeking across Ontario.

- There is a classifieds section in the OAA website, which is focussed on architectural positions, and it is free to members and firms to use.
- The OAA also participates and supports the IPLAN program offered through JVS settlement programs.
- The OAA supports job search and professional practice networking programs offered by University of Toronto and University of Waterloo.
- Two interns each year are given the opportunity to attend the RAIC Festival of Architecture and the OAA Conference for free. While these platforms are not necessarily job search focused, they often provide great professional networking opportunities.
- Local Societies are another way that interns and students have, to network with local architects and find out about jobs.

It is noteworthy to mention that OAA recently made two significant changes to the licensure process which was well received by a majority of the intern members:

1. **Online CERB hours:** The introduction of online forms to fill in the CERB hours had garnered positive feedback from intern members. It has saved time and made the task less exhaustive than what it was before.
2. **Online ExAC:** The pandemic paved way to launch the online version of the exam for the first time on 2021. This change was well received and many test users found the online interface to be much user friendly and easily accessible than the original paper pen method. A survey conducted following the exam provides enough results that the online exam has great potential moving forward in the future.

These changes came after extensive engagement and policy work done by the OAA, and serve as positive examples of increased efficiency within the IAP and benefit to the Interns Architects' that this report is intended to continue to emulate.

Research Methodology

Introduction

On June 24th 2021, the Interns' Committee put forth a motion to conduct research on the many aspects around the Internship in Architecture Program (IAP). Quoted below is an excerpt from the original motion:

'It was moved by Abu-Bakare and seconded by Schuhmann that Council approve the engagement of an architectural graduate research assistant whose scope of work will include administration and organization of research for the Interns Committee over the course of the next three months, with a maximum budget of up to \$10,000 to be drawn from policy contingency; that Councillor Abu-Bakare provide oversight and supervision of the individual; and, that Abu-Bakare will work with staff to finalize the scope of work.' - CARRIED

The IAP is one of the paths to licensure to become an architect in Canada. There has been many revisions made to the program over the years to accommodate the changing conditions of the profession. To continue that ongoing process, this research looks deeper into the various opportunities and challenges faced by members pursuing the Internship in Architecture Program.

The Interns' Committee created a team of members to consolidate a research report to identify more specific challenges perceived being an Intern Architect in the province of Ontario:

Farida Abu-Bakare, Councillor & Chair of Interns Committee
Heather Breeze, Intern Representative on Council
Lashmi Ollivierre, Administrator IAP
Natasha Krickhan, Councillor & VP Education
Vani Gopalkrishna, Architectural Graduate Research Assistant

Historical Data

The first exercise was to understand the body of work that been done previously. Below are the list of research reports, surveys done specifically addressing the challenges faced by the Intern Architects.

1994	Report on issues affecting Graduate Associates
1997	OAA 1997 Review
2004	Survey for Internationally Trained Professionals (ITP)
2005	Report to the Intern Architect Task Group
2008	Intern Initiative Survey
2011	Member and Practice Survey
2014	BEcoming an Architect: Sustaining Our Future
2018	Intern Title Survey
2019	OAA Membership Survey
2020	Intern Title Survey OAA Practice Survey OAA Membership Survey Roundtable on Equity, Diversity, and Inclusion

Three key documents were chosen whose data were relevant to the present context and aimed to address some of the key questions of the time. Below are the three documents that were further studied and analyzed in the following sections of this research.

- 2019 OAA Membership Survey
- 2020 Roundtable on Equity, Diversity, and Inclusion
- 2020 Intern Title Survey

Within each of these 3 documents, the key issues as collated by the survey organizers and previous document authors are pulled out. These key issues, along with the overall summary of each document, form the basis for the Comparative Analysis section at the end of this report, which in turn formed the Recommendations.

Research Objectives

The research catalogues relevant findings and analysis materials that will eventually be submitted to the council for review. The team met weekly to check-in on the progress and identify key themes and relevant topics of discussion. The first step was to identify the already existing surveys made and extract the key themes that require more attention.

The three documents chosen assisted the team to better understand various barriers that are being faced in the profession currently.

- 2019 OAA Membership Survey by Interns provided extensive data about the various aspects of the architecture profession in general.
- 2020 Intern Title survey specifically discusses about the 'Intern Architect' title and its social & professional implications.
- 2020 EDI Roundtable sheds light on the profession from a different perspective in regards to equity, diversity and inclusion.

Many overlapping themes that are found in these major surveys request for calls to action in order to maintain a healthy balance between the architecture profession and its surrounding socio-economic situations.

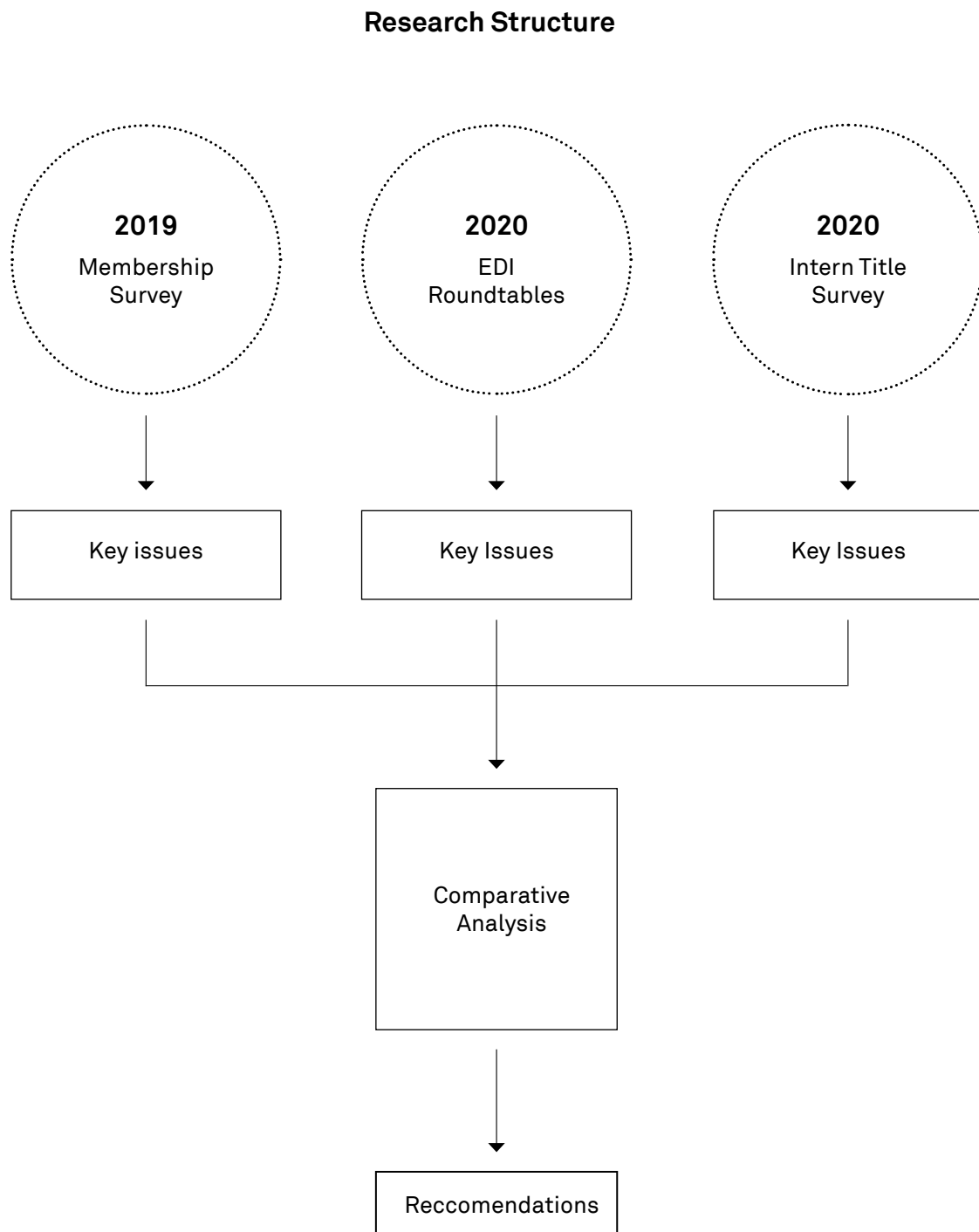


Fig. 1.1 Diagram drawn by author

Executive Summary

This research report is situated around the issues young professionals face as Intern Architects working towards their licensure process. The findings trace several challenges around social, psychological, economic and work place settings. The three most recent documents related to data and feedback collection from Intern Architects were selected to analyze:

1. 2019 Membership Survey
2. 2020 Roundtable on Equity, Diversity, and Inclusion
3. 2020 Intern Title Survey

Through comparative analysis, three distinct major themes arose from the feedback analyzed in the three documents:

- Professional Challenges
- IAP Challenges
- Job Opportunities & Networking

As of September 2021 the OAA had 1890 registered Intern Architects, making up 23% of the OAA membership. The Interns Committee, supported by OAA council, finds it crucial to further analyze the and challenges and opportunities specifically related to Intern Architects, culminating in a series of recommendations to address these challenges.

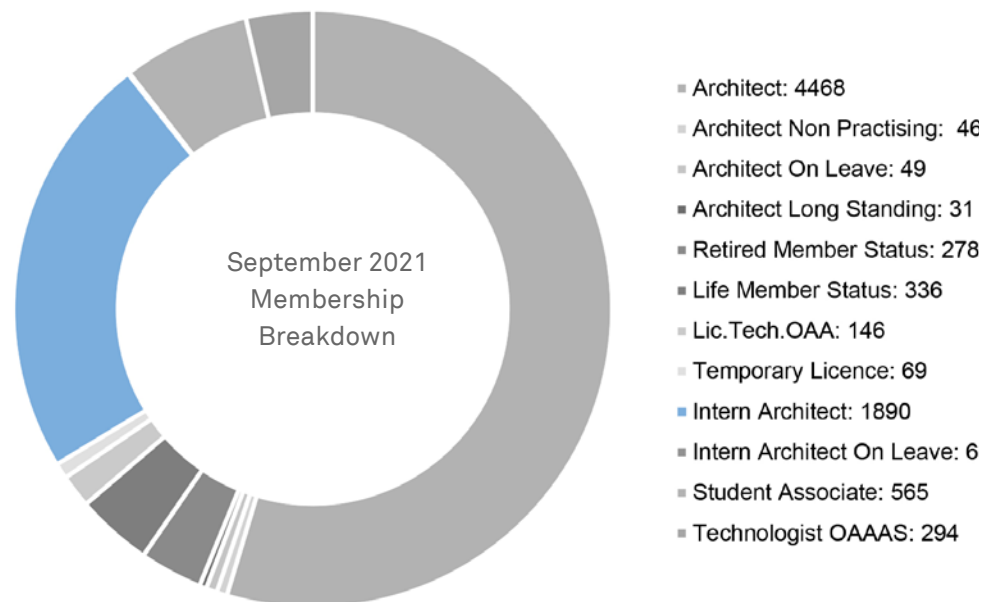


Fig. 1.2 Graph taken from September, 2021 Council Report

The Interns' Forum (TIF)

The Interns' Forum (TIF) was established in 2012 by the Ontario Association of Architects (OAA) Council and charged with conducting a review and evaluation of the process to become an architect, with a particular focus on the internship period. In exploring ways to make the journey from Student Associate to Intern Architect to Architect a more holistic and meaningful experience, the committee reviewed the needs and mandates of four constituencies: Interns, Practices, The Profession, and The Schools, as well as past and current trends in the profession. TIF was established to examine the situation of Intern Architects in Ontario, review the established process for licensure, and make recommendations for improvement.

TIF was comprised of OAA Councillors, practising architects and intern architects of various ages/experience levels/firm sizes/geographic locations. In addition, senior representatives from the Schools of Architecture at Toronto, Ryerson, and Waterloo Universities joined the working group and acted as resources to the committee as have the OAA Executive Director and the OAA Administrator Licence.

The mandate of TIF was in part to:

- Work with CALA/CACB through the Executive Director and Council to ensure that appropriate architectural training/education is being offered by the schools.
- Liaise with employers/firms in the province to elicit their support in the internship process.
- Consider if and how the coordination of ExAC study groups (within restrictions that apply as the administrator of the exam) might be facilitated by the OAA and or available study material for the ExAC in conjunction with CALA.
- Establish an annual presentation to the individual schools of architecture which focuses on the regulation of the profession of architecture in Ontario, the process to licensure and the role of the OAA.
- Facilitate the integration of the committee's activities and initiatives into the societies as a way of networking between Intern Architects and the profession.
- Facilitate a survey of students, interns, supervising architects, mentors & practices which will look at whether students are satisfied with the subject matter they are learning. If they feel they are properly prepared to participate in the building design & construction process. Whether supervising architects feel that interns have the knowledge necessary to constructively participate in the building design & construction process.

- Consider ways to integrate students into the OAA earlier in the process.
- Given the decision of CALA to hold a validation conference in 2014 the committee was also tasked with producing a report to CALA on issues to be addressed.

BEcoming an Architect: Sustaining Our Future

In 2014, the Interns' Forum published a White Paper titled 'BEcoming an Architect: Sustaining Our Future' on behalf of the OAA to CALA that extensively outlines the many areas for improvement in the lengthy and challenging licensure process. The research addresses key concerns in each phase of the career from the beginning of school through to licensed architect. This extensive report marked a significant moment in creating awareness and advocating to make the licensure path more inclusive & encouraging for everyone. The experiences of students in the schools of architecture was also to be included as part of the overall process. For further details please refer to the Appendix section.

The work of TIF served as a basis for this report, with research and analysis building upon the 'BEcoming an Architect' paper. The recommendations from that paper are in various states of progress and completion, and the recommendations that arise out of this paper were carefully considered in that context to avoid repetition or redundancy. Please refer to Appendix I for the recommendations from 'BEcoming an Architect: Sustaining our Future'.

2019 Membership Survey

Introduction

This membership survey was conducted by the OAA in the winter of 2019 to gather and interpret member perceptions in the architecture profession. The major areas of engagement can be classified as follows:

- Continuing Education and Conferences
- Communication Efforts and Mediums
- Practice Advisory Services
- Government Relations and Policy
- Intern Architects

For the purpose of this research, the Intern Architects section is taken into consideration for further study and analysis. The following findings from the Intern Architects section are compiled from the 2019 survey report [link]. The report helps us understand the current trends in the architecture profession, especially during the internship process towards licensure across Ontario.

Demographics

The survey was open to the entire membership of the OAA. As per the graph below, only around 20% of the respondents were intern architects and the remaining 80% were other members of the profession. Most of the themes discussed around the process of licensure is based on the comments from the minor group of participants. However, it is also interesting to see that some of the issues faced during the internship process still continues to exist for those who have completed the process and are now licensed architects, or other professionals.

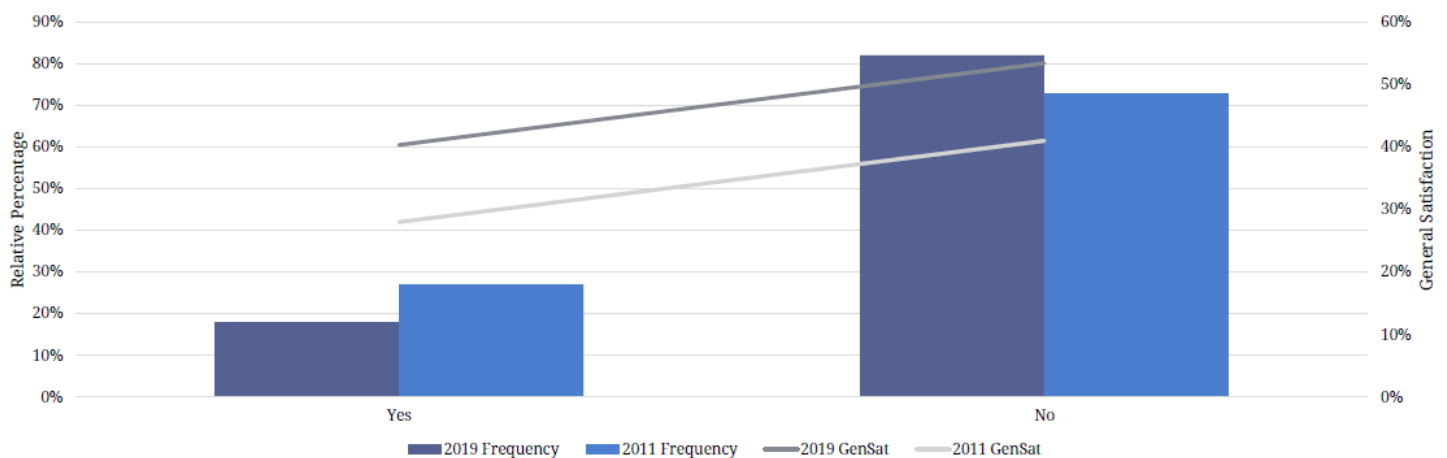


Fig. 1.3 Graph extracted from 2019 Membership Survey P:567

Note:

The graph above is the result of the survey conducted by Stratcom. ***Below are the terms specified in the original document:***

- The final survey data has been statistically weighted to ensure the proportions of Architects, Intern Architects and Licensed Technologist OAAs match their proportions of the membership database.
- Margin of error for a sample of this size is +/-2.4, 19 times out of 20. The margin of error increases when analyzing sub-samples of the data.
- Some charts and tables might not total 100 due to rounding.
- All figures are percent (%) unless indicated otherwise.

Analysis

The responses reviewed from the 2019 Membership Survey were within the section relating directly to Intern Architects, from pages 567 to 670. There were a total of 1306 responses received highlighting several themes in the profession, with the most common answers highlighted in the next two graphs.

Major discussions in this survey revolve around the themes of finance, education, work-life balance, job satisfaction, benefits of becoming licensed vs non-licensed, need for more legal support and insurance benefits. There is also an extensive feedback on the many challenges faced during the IAP process including difficulty in arranging work in the required areas, and lengthy its duration. Lastly, there were also feedbacks around making networking platforms more inclusive and accessible for all members that would help improve job searching process and career growth.

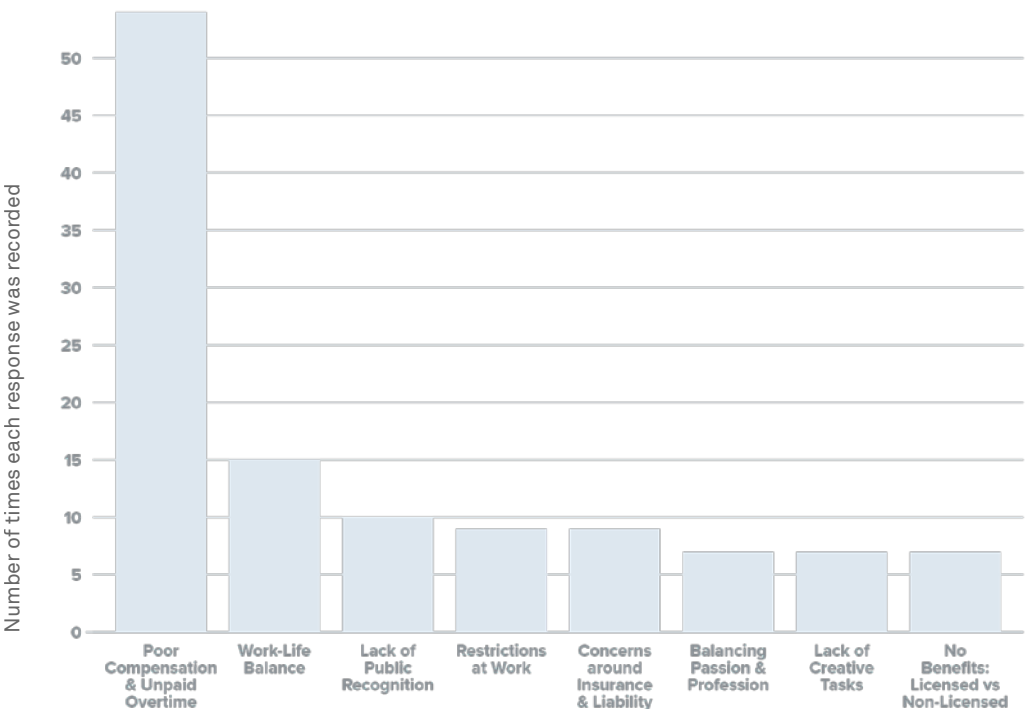


Fig. 1.4 Graph drawn by author

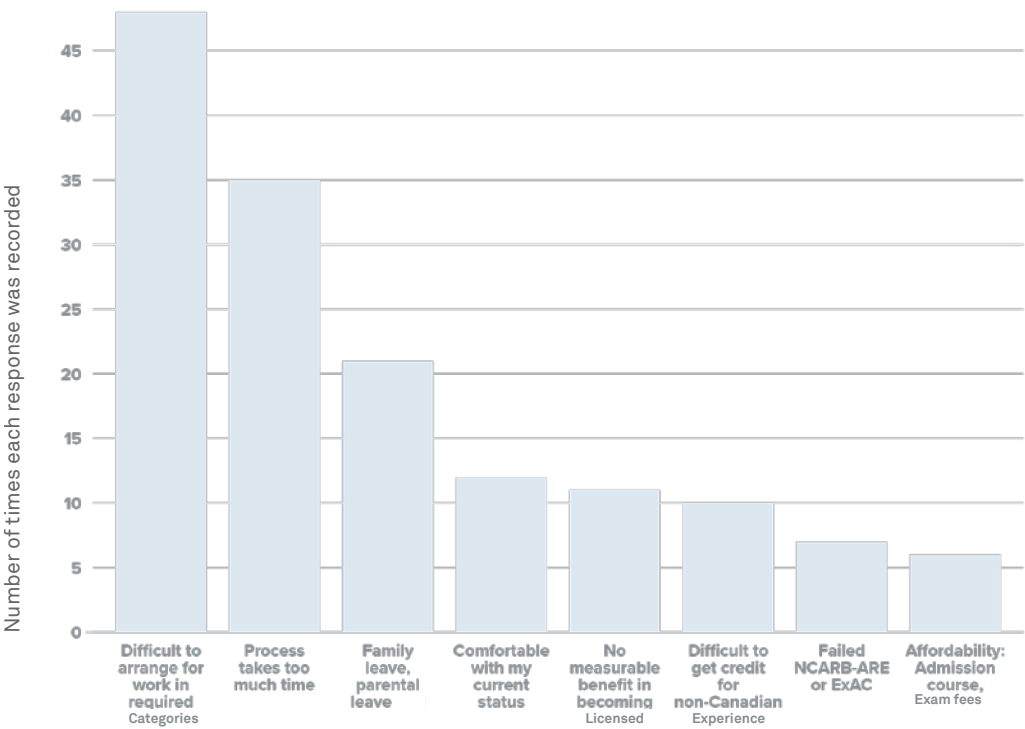


Fig. 1.5 Graph drawn by author

Key Issues

- Poor compensation & unpaid overtime
- Work-life balance
- Lack of public recognition
- Restrictions at work
- Concerns around insurance & liability
- Balancing passion & profession
- Lack of creative tasks
- No benefits; licensed vs. unlicensed
- Difficult to arrange for work in required categories
- Process takes too much time
- Family & parental leave
- No measurable benefit in becoming licensed
- Difficult to get credit for non-Canadian experience
- Failed exams
- Affordability of admissions course & exams

2020 Roundtable on Equity, Diversity, and Inclusion

Introduction

On June 9, 2020, President Kathleen Kurtin shared a message with OAA membership stating that “accessibility, equity, diversity, and inclusivity are critical issues for the architecture profession” and that the OAA must “work to remove systemic obstacles faced by both those who practice architecture and those on the path toward licensure.” Following direction from Council, a series of roundtables were conducted across the OAA membership by a third party consultant, focused on equity, diversity, and inclusion. This section provides a summary of the roundtables that took place in the fall of 2020 held for student associates, intern architects and architects.

Demographics

The OAA issued an invitation to members to participate in a roundtable on Equity Diversity and Inclusion. The roundtables were held virtually over Zoom and were divided into two events in order to enable greater participation within the confines of the virtual format.

- The session for architect members was held on October 29, 2020 and,
- the session for intern members and students was held on November 25, 2020.

The insights and reflections provided within this report are based on the thoughtful contributions of the **43** roundtable participants.

Analysis

The Roundtables were organized around a series of themes. The participants were asked to explore the themes but were allowed the opportunity to delve deeper into topic areas that were of most importance and interest to them. These themes are found on page 5 of the Roundtable report and include the following:

01. Naming the Problem

Example questions include: What is the nature of the equity challenges facing architecture as a profession?

02. Educating for Change

Example questions include: How do we enhance equity within the profession?

03. Recruitment, retention, and advancement of diverse talent

Example questions include: How do we create greater accountability at the leadership level for advancing diversity within the profession and attracting equity-seeking/historically marginalized groups?

04. Building Communities of Support/Practise

Example questions include: How do we build and enhance communities of support for historically/marginalized groups within the profession?

Of the two roundtables, Rountable #2 which consisted of Intern Architect members and Student Associates felt more strongly than the participants of Roundtable #1, made up of Architects, that the themes covered by the Roundtables were important to them (68.4% for Interns and Students vs. 50% for architects. With a total of 43 OAA Intern Architects and Student Associates who participated in the roundtables, there were 132 notable responses.

Roundtable #1 & #2 Results:

Prompt: The topics that were covered were important to me

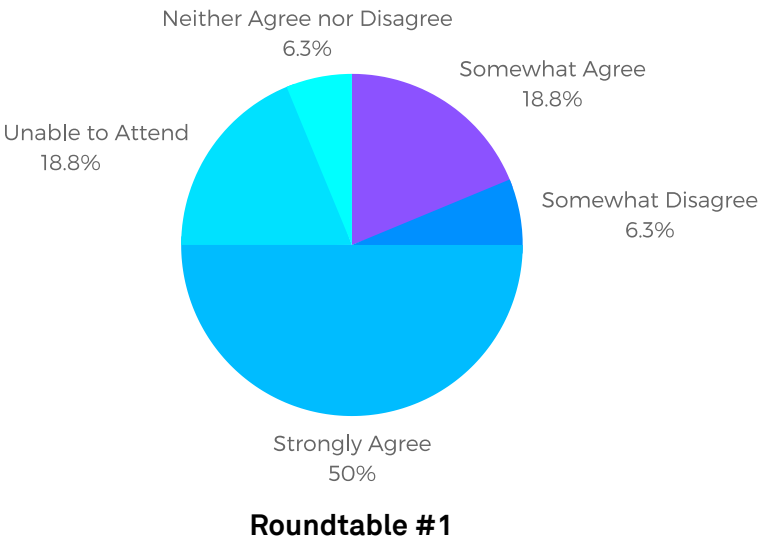


Fig. 1.6 Graph extracted from 2020 EDI roundtable report P: 31

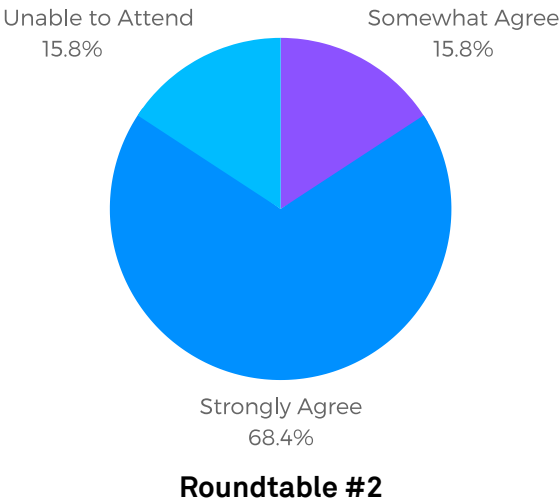


Fig. 1.7 Graph extracted from 2020 EDI roundtable report P: 31

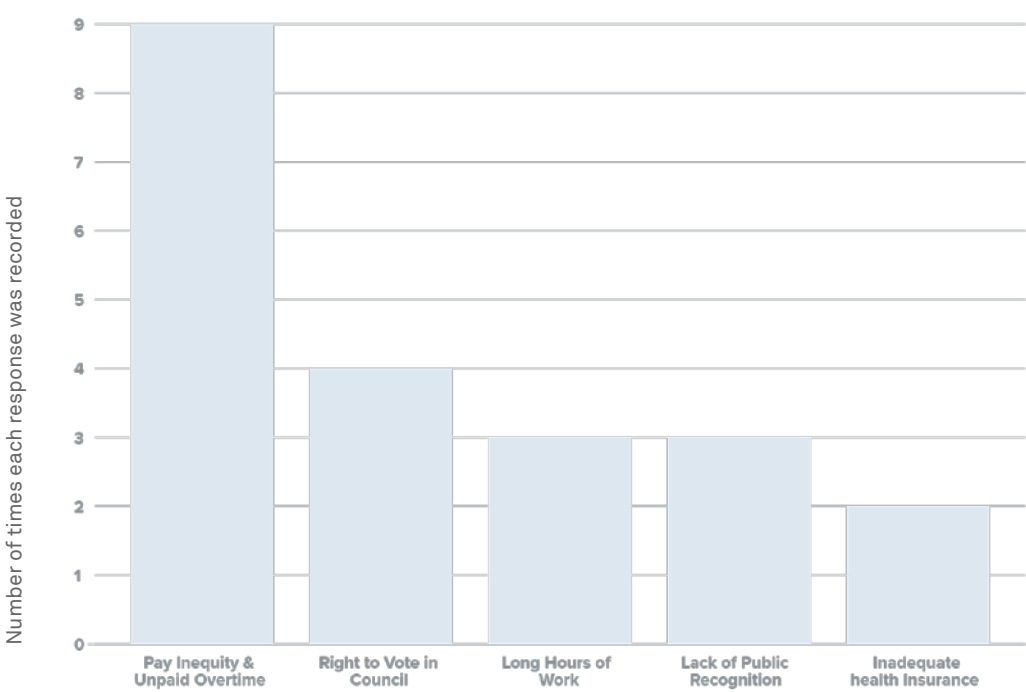


Fig. 1.8 Graph drawn by author
Note: The figures are indicative of the number of times each response was recorded.

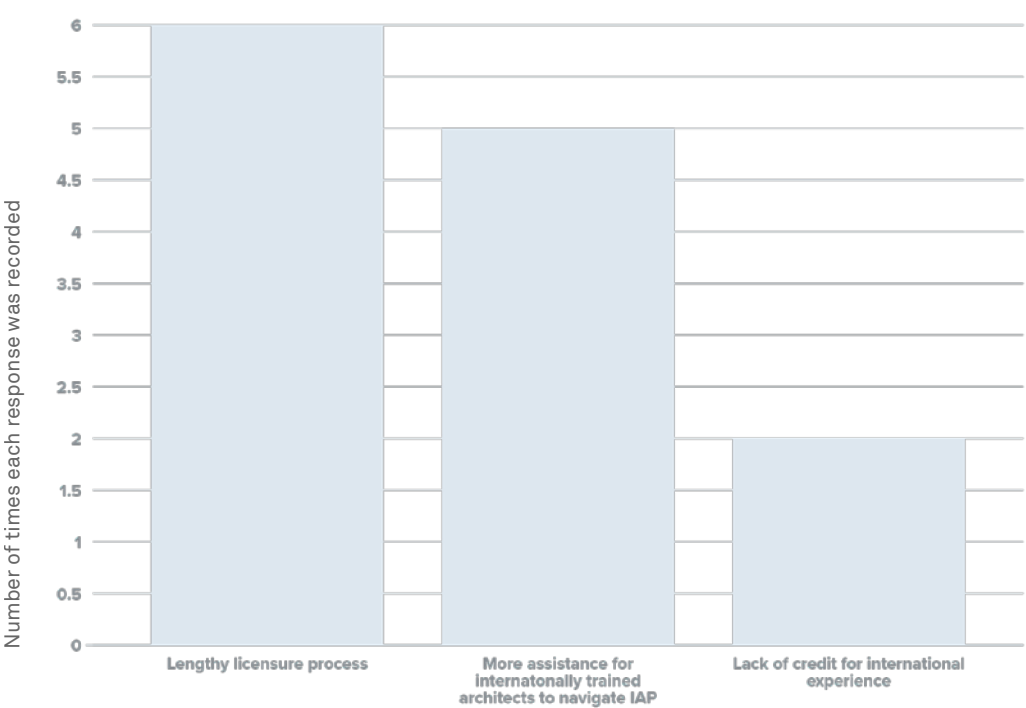


Fig. 1.9 Graph drawn by author

Key Issues

- Poor compensation & unpaid overtime
- Pay inequity & unpaid overtime
- Right to vote in council
- Long hours of work
- Lack of public recognition
- Inadequate health insurance
- Lengthy licensure process
- Need more assistance for internationally trained architects to navigate the IAP
- Lack of credit for international experience

2020 Intern Title Survey

History of the 'Intern Architect' Title

Apprenticeship has always been a crucial part of the architecture profession. In 1994, OAA Council changed the title for those in the apprentice process from 'Graduate Associate' to 'Intern Architect'. This change was one of the recommendations made by the Graduate Associate Task Force assembled to improve the relationship between Graduate Associates and the OAA, after completing a consultation process titled 'The Questionnaire'.

Below is the recommendation regarding the title:

The misleading nature of the title 'Graduate Associate' was commented on by 80% of respondents to the Questionnaire; they felt the name had no meaning to the public. After years of post-secondary education they are not allowed to call themselves Architects in any form. [...]

The Task Force recommends the name change from 'Graduate Associate' to that of 'Intern Architect', for the following reasons; it communicates to the public that an Intern Architect has obtained certain professional qualifications and is now in the process of putting the 'theory' into 'practice'; it allows the Intern to have pride in their academic accomplishments and profession, and thirdly, there is an acceptance of the title 'Intern Architect' in the other Architectural Associations throughout North America.

Recommendation 6:

change the name from 'Graduate Associate' to 'Intern Architect'.

It was considered a success to have the word "architect" within the name. It accomplished the wish for Graduate Associates to be recognized as part of the architectural profession from the name alone. Since the change within the OAA, the title 'Intern Architect' has been used widely in Canada. Despite its success, it is being noted that the title has also garnered mixed connotations over the years. Ongoing review of the internship path to architectural licensure has included considering another title change to more accurately reflect the public's understanding of the role of the Intern Architect. This research aims to identify the most appropriate title and its connotations, provide research and background to any recommendations for a title change to more accurately

reflect, and communicate to the public the experience and responsibilities of those pursuing architectural licensure.

2020 Intern Title Survey Results

Introduction

As a part of OAA’s continual efforts to address some of the on going issues in the profession, the 2020 Intern Title Survey was charted out with a special attention towards understanding the implications around the title ‘Intern Architect’.

Demographics

The OAA in collaboration with Stratcom programmed this survey to the members through an open link that was active from October 21 to November 11, 2020. There were a total of 1174 respondents. The membership breakdown below helps understand the audience diaspora. It is beneficial to note that a significant number of participants are either Intern Architects & Architects, who are very relevant to the core theme of the survey.

Membership Details

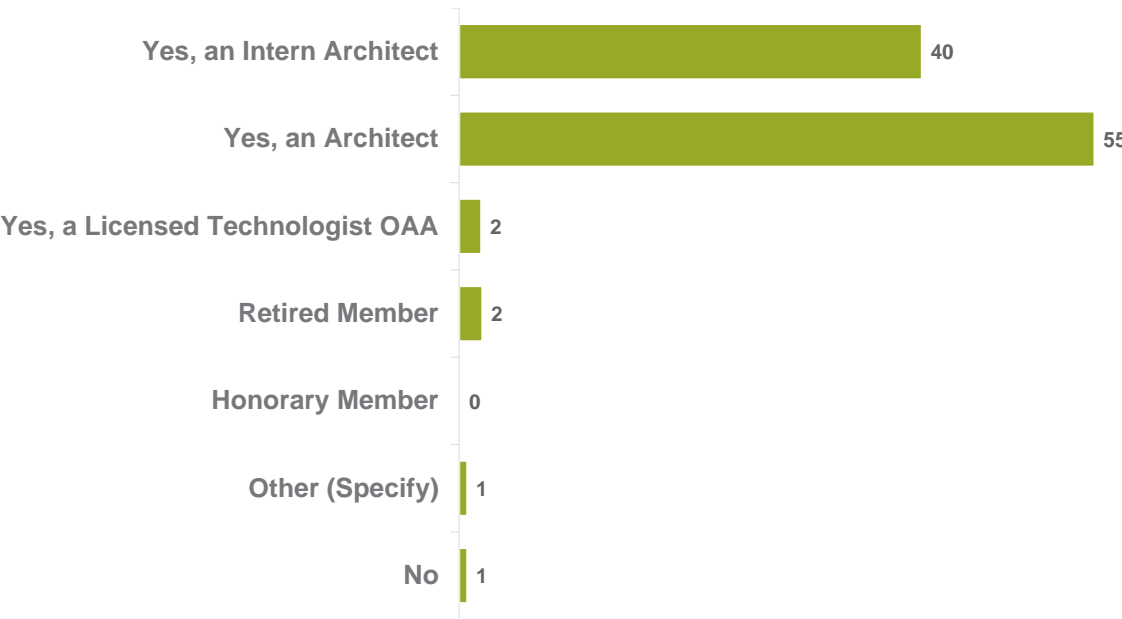


Fig. 1.10 Graph extracted from 2020 Membership Survey P:4

Note:

The graph above is the result of the survey conducted by Stratcom. ***Below are the terms specified in the original document:***

- The final survey data has been statistically weighted to ensure the proportions of Architects, Intern Architects and Licensed Technologist OAAs match their proportions of the membership database.
- Margin of error for a sample of this size is +/-2.4, 19 times out of 20. The margin of error increases when analyzing sub-samples of the data.
- Some charts and tables might not total 100 due to rounding.
- All figures are percent (%) unless indicated otherwise.

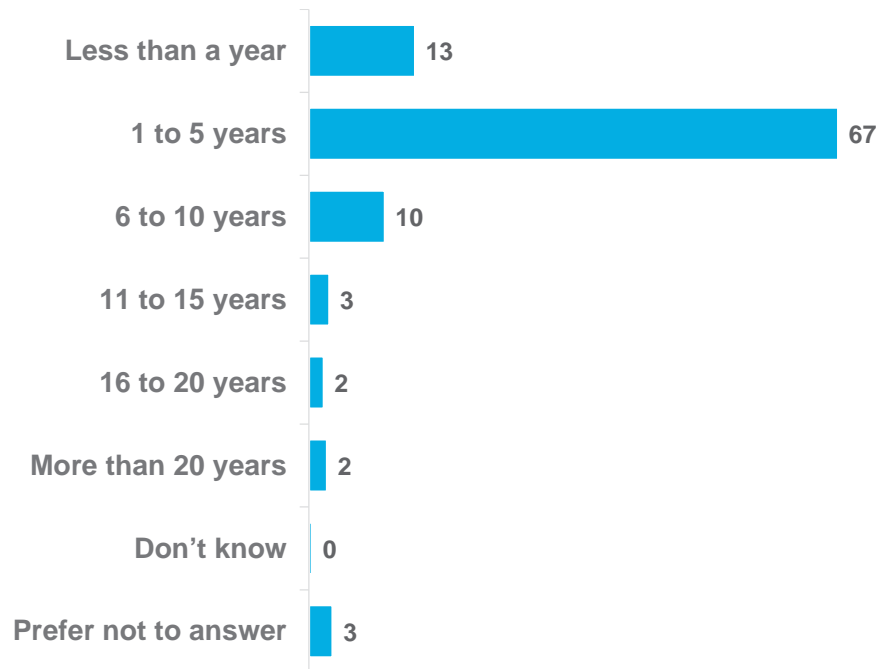
How long have you been an Intern Architect?

Fig. 1.11 Graph extracted from 2020 Membership Survey P:51

Analysis

61% of Intern Architects feel that the title Intern Architect does not accurately reflect the roles and responsibilities of the title. A majority of all members surveyed (54%) agree that the title should be changed to reflect the higher level of education as required in the IAP.

The following graphs show the major areas of discussion identified in the survey. This gives an overall idea of being an Intern Architect, the emotions the title evoke, psychological implications and possible alternatives to the title.

Do you feel the title 'Intern Architect' has a negative, positive or neutral connotation?

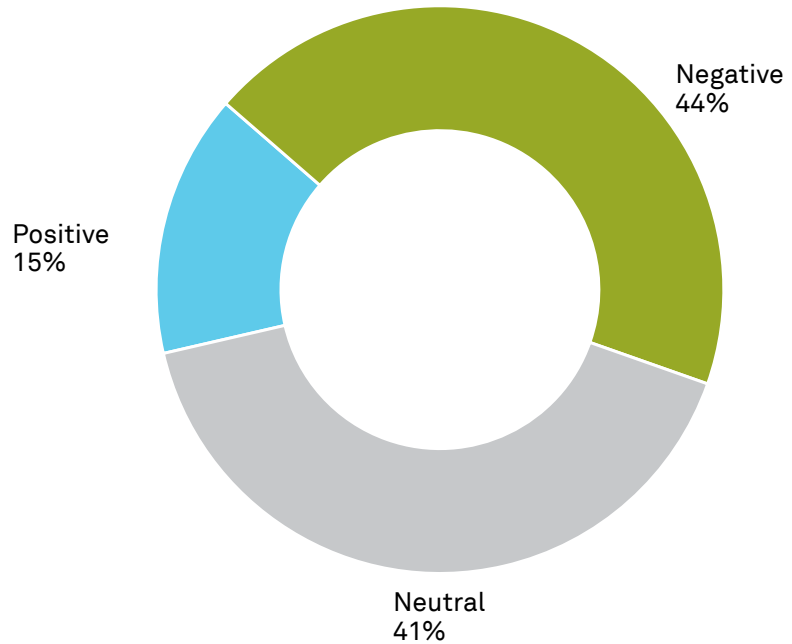


Fig. 1.12 Graph extracted from 2020 Membership Survey P:34

Awareness about discussions to change the 'Intern Architect' title

Almost one-third (31%) are somewhat aware of the discussion to consider changing the title "Intern Architect", with a further 13% very aware. The majority (57%) are not very aware or not at all aware.

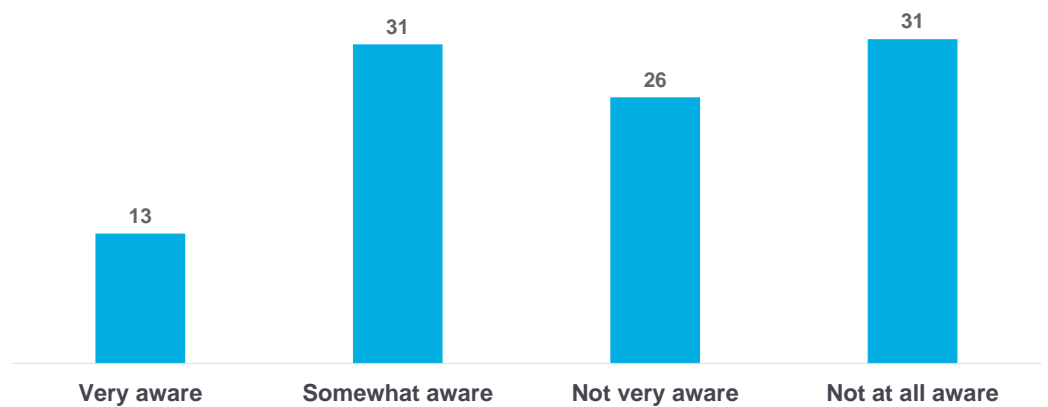


Fig. 1.13 Graph extracted from 2020 Membership Survey P:8

Reasons for Positive Connotation of the title n=180 responses

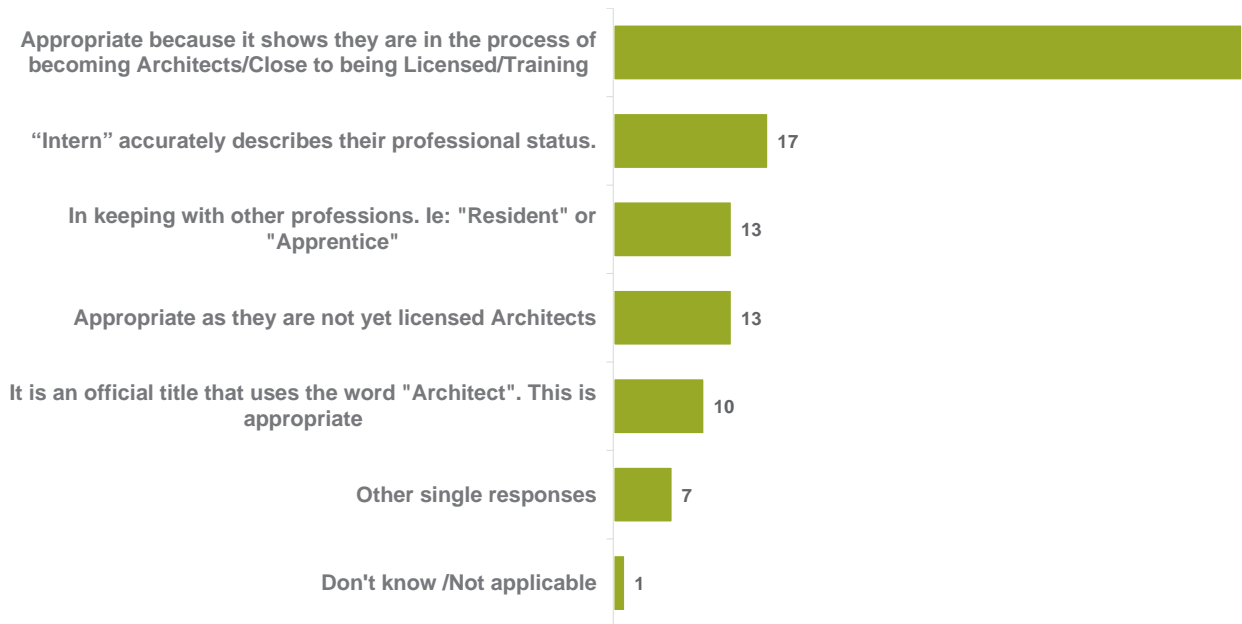


Fig. 1.14 Graph extracted from 2020 Membership Survey P: 36

Reasons for Negative Connotation of the title n=513 responses

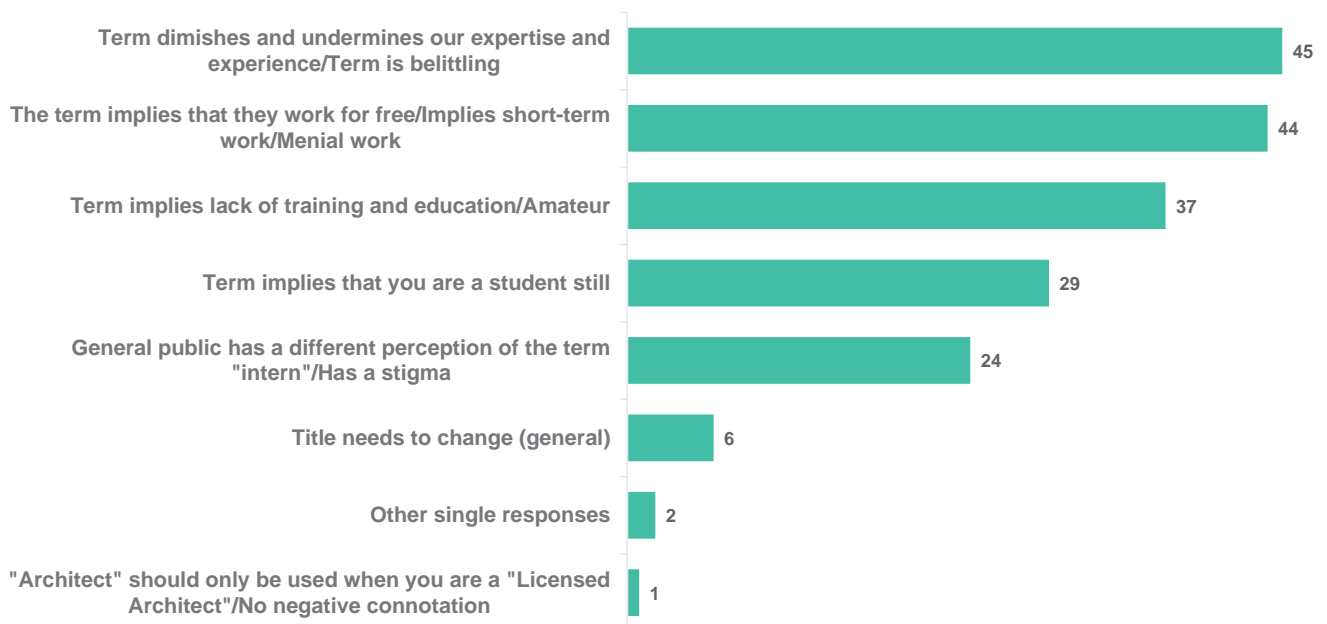


Fig. 1.15 Graph extracted from 2020 Membership Survey P: 37

The following graphs show the possible suggestions for the title 'Intern Architect'. The responses are categories into three based on the type of audience.

Graph 1.13 shows the responses from all the participants in the survey

Graph 1.14 shows the responses from the Intern Architect members who are advocating for a title change

Graph 1.15 shows the responses from all the members who are in support of the title change.

It can be noted that the top two suggestions from the majority of responses are:

- Graduate Architect
- Apprentice Architect

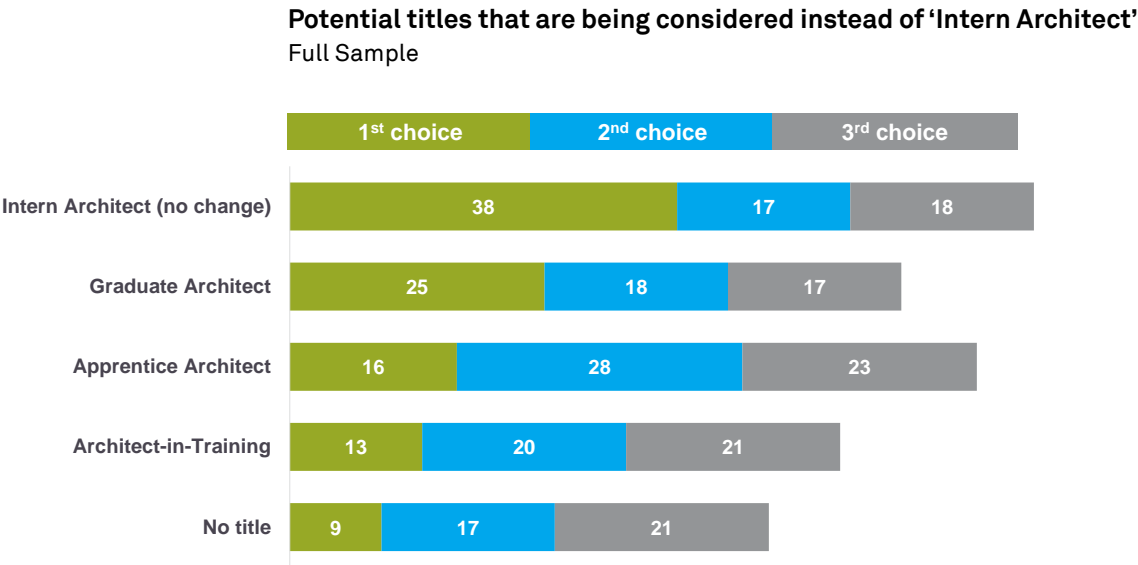


Fig. 1.16 Graph extracted from 2020 Membership Survey P: 44

Potential titles that are being considered instead of 'Intern Architect'

Intern Architects

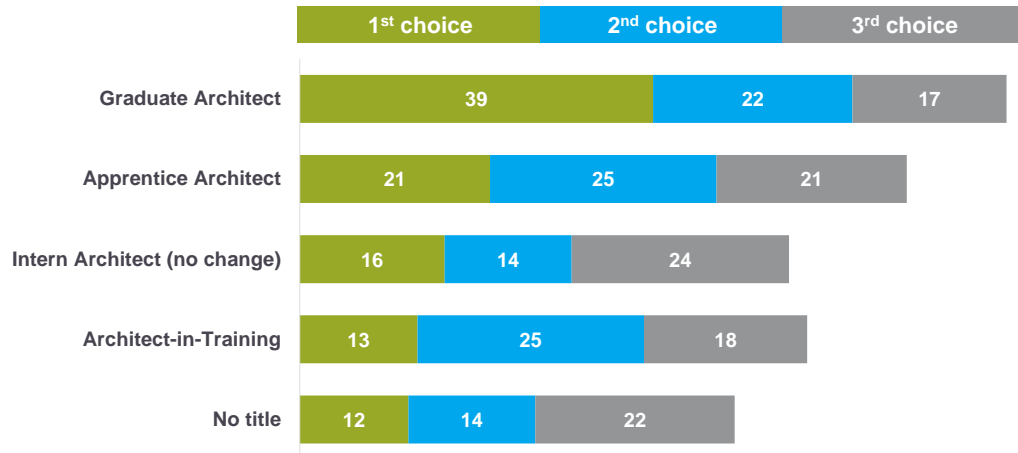


Fig. 1.17 Graph extracted from 2020 Membership Survey P: 45

Potential titles that are being considered instead of 'Intern Architect'

Members who support changing the title

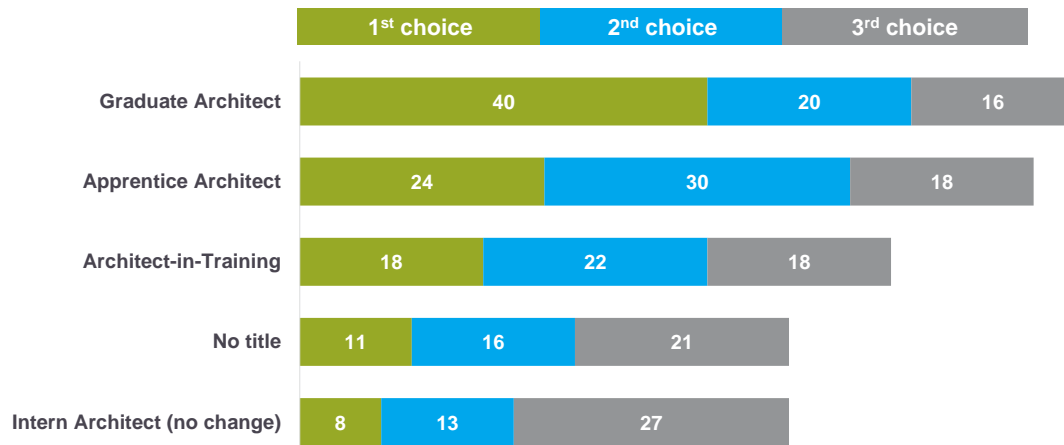


Fig. 1.18 Graph extracted from 2020 Membership Survey P: 46

Key Issues

- Title doesn't accurately reflect experience
- Majority of OAA members unaware of discussions surrounding change to the title of "Intern Architect"
- Term diminishes and undermines the Intern's expertise
- Term implies that the Intern works for free or is confined to short-term work
- Term implies a lack of training and education

Environmental Scan

To best address the concerns around the having the word ‘intern’ in title for those members pursuing architecture licensure, an environmental scan was conducted to understand the different titles used in other regulated professions across Ontario. The table below extracts the two key components in each profession that are important to the members in their licensure process:

- The title used to represent members who have completed their educational requirements and are on their professional training period.
- The average duration of their training period completing which, they become fully eligible to apply for licensure.

PROFESSION	TITLE	TRAINING DURATION
Accountants	Legacy Students	2 years
Dentistry	Dentistry Intern/ Graduates	6 - 18 months
Dietitian	Dietetic Intern	8 months - 2 years
Doctors/ Physician	Resident Doctor/ Physician	5 years
Planner	Candidate Member	3 avg. Max. 7 years
Landscape Architect	Associate	2 years
Lawyer	Articling Candidate	8 - 10 months
Pharmacist	Pharmacist Intern	600 hours

Key Findings

Following the environmental scan, it can be inferred that professions that use the word ‘Intern’ in their title have a training duration for a specified time. This duration ranges from 600 hours to a maximum of 2 years, after which an intern member becomes eligible to apply for licensure.

For professions that has a longer training period, that extends more than two years does not use ‘Intern’ in their title. In the architecture profession, as laid out on page 4 of the IAP Manual 4th edition, ‘a minimum of 3720 hours (2 years) of recorded architectural experience must be gained in the specified areas of

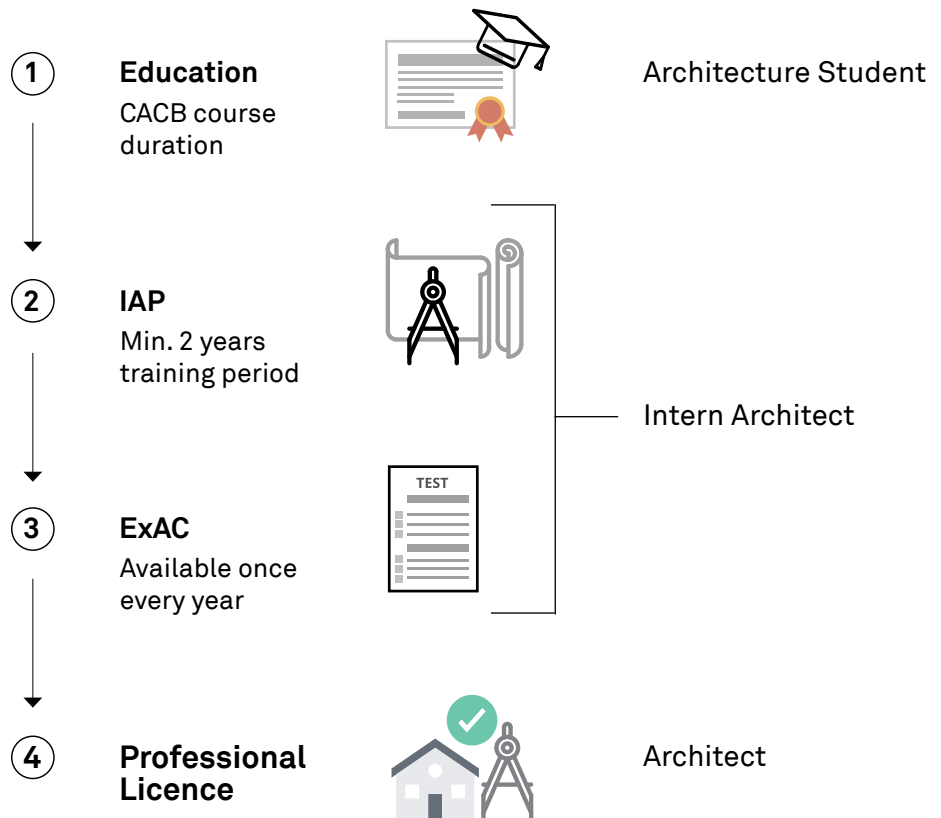
architectural practice' to become eligible to apply for a licensure. There is no time limit for the duration of the training period.

The specified areas of experience are classified into three major categories consisting of 17 required activities to be fulfilled during the training process. A comparative analysis of the feedbacks received from the 2019 Membership Survey & 2020 EDI Roundtable Report highlights the major challenge faced in completing the IAP program. More details about the comparative analysis can be found in the following section on page 26.

These challenges facing the IAP extends the length of the training period for intern architects, that is perhaps longer than other professionals who are designated “interns”.

To encourage intern members to fast-track their training period within a span of 5 years, the OAA revised its membership fees structure. An intern architect within 5 years of training period has a reduced member fees beyond which, the intern architects pay the full membership fees of that as an architect.

Path to Licensure : IAP process



With this in place, the intern members on an average, carry their title as an ‘intern architect’ for a duration of 2-5 years. In most cases (as highlighted in the feedback from the 2019 Membership Survey & 2020 EDI Roundtable Report) completing the IAP extends for a longer time due to other factors facing life like starting a family, child birth, economic conditions, job opportunities and so on. It could be inferred from the feedbacks below taken from the surveys analyzed in this report, that prolonged use of the title ‘intern architect’ in ones career, psychologically undermines the value of the professional.

*‘...voting and representation for rights of interns within OAA, **change “intern”** demeaning terminology, modernize traditional methods and ideology of OAA to look towards a more progressive self-governing strategy rather than the traditionalist approach,...’ (EDI P:38)*

‘...Eliminate/replace the word “intern” in our professional title - the word intern is associated with students currently enrolled in universities/colleges.’ (MS P:606)

‘Greater understanding of issues which make licensing impractical on a 5 year timeline...’ (MS P:613)

Intern title in other Jurisdictions

The American Institute of Architects (AIA) recently issued a position statement redefining the title “intern.” Below is an excerpt taken from AIA’s ‘Directory of Public Policies and Position Statements’ as amended by the Board of Directors as of May 2019:

I.D.4. Pre-licensure Titling:

The AIA supports the title of “intern” for students who are working in an architectural office while actively pursuing architecture degrees in programs accredited by the National Architectural Accrediting Board (NAAB), or studying in pre-professional programs.

AIA supports the title of “Architectural Associate” or “Design Professional” for those who 1) have earned a degree from a program accredited by NAAB, or who have met education/experience requirements in their jurisdiction AND 2) are participating in the National Council of Architectural Registration Boards’ Architectural Experience Program or are meeting their jurisdictions’ experience requirements.

Recommendations under this section could focus on highlighting the following:

- A concise webinar highlighting the key components of the IAP such as details about minimum duration of training period, and other relevant Ontario specific guidelines.
- Expert tips on how to arrange for work in different CERB categories of the IAP.
- Provide digital tools for tracking CERB hours more efficiently.
- Highlight existing support systems that are in place for intern members who are on maternity leave, financial hardships and any other personal situations to be able to continue with the IAP process.

Comparative Analysis

Though the 3 documents studied at length in this report were intended to gather information and feedback from the OAA membership through different lens and for different purposes, overlaps in reported challenges, issues, and opportunities were apparent throughout. Additionally, throughout the 3 documents surveyed, issues about marginalized communities and the specific and additional difficulties facing Intern Architects identifying in minority groups were discussed. Rather than standing alone as a key theme, all of the issues raised and the 3 key themes outlined above were considered and analyzed through the lens of equity, diversity, and inclusion.

The key issues identified from the three documents studied can be categorized under three Major Themes:

- **Professional Challenges:** feedback related to difficulties in the workplace or the profession at large
- **IAP Challenges:** feedback related specially to the Internship process
- **Job Opportunities & Networking:** feedback related to finding and retaining employment, and making connections with others in the industry

The overlaps between the 2019 Membership Survey and the 2020 Roundtables were especially numerous. The importance of this repetition of feedback is especially striking considering the difference in format and intention of both of initiatives as undertaken by the OAA: the 2019 Membership Survey was a scripted survey to all memberships, while the 2020 Roundtable (as included here) was an open conversation specifically targeted at Intern Architects and Student Associates. These overlaps were reflected in the results of the 2020 Intern Title Survey, with Intern Architect respondents voicing concerns and challenges that were linked back to misunderstandings or misuse of the title “Intern Architect”.

Within this analysis the following recommendations, it is noted that the range of challenges and issues voiced by Intern Architects is wide, and portions may fall outside the scope and mandate of the OAA. Great effort has been made to strike a balance between acknowledging all feedback Intern Architects, while addressing possible solutions and recommendations through the practical lens of the resources that can be offered by the OAA within their mandate.

Equity, Diversity, and Inclusion

Understanding cultural diversity was a mainstream topic in the EDI Roundtable. There were many voices advocating for the architectural practices to embrace and give equal opportunity to the BIPOC community. Comments received from the participants signifies the following:

1. A need for more awareness about cultural diversity through conferences, Con-Ed, training to encourage more conversations.
2. There is a need for more demographic data to better understand and address specific concerns related to BIPOC and other minorities in the profession.
3. Need for Incentives or legislative changes to better represent and encourage architecture by and for marginalized communities.

The graph below outlines the main categories of discussion within the 2020 EDI Roundtable:

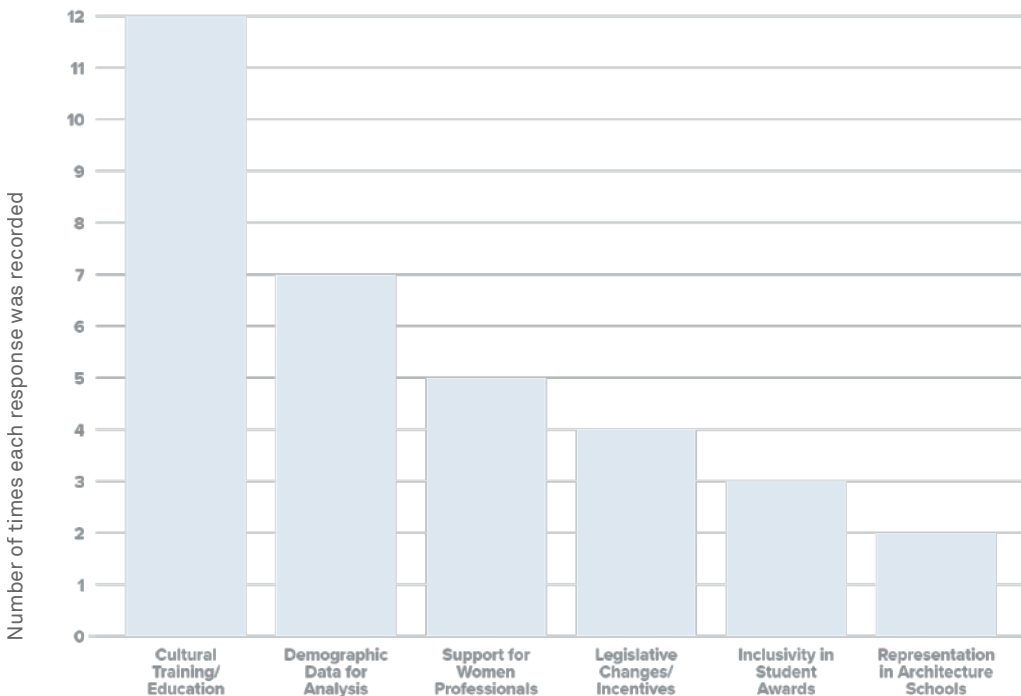


Fig. 1.19 Graph drawn by author

The 2020 Roundtable document informed the OAA not only of the issues facing Interns overall, but with the added lens of the outdated and inequitable standards of the profession. As part of our analysis of the roundtable responses, we reviewed the “Notable Responses” pages 34- 36 of section 7.1 titled “Appendix A - Survey Roll-Up, Survey Results” and pages 38- 44 of section 7.2 titled “Appendix B – Survey Roll-Up, Action Items and Priorities”.

Though the EDI Roundtable did not touch upon the subject of IAP and the OAA-Intern relationship exclusively, concerns and comments around the internship process were continually raised and were tied into more broad comments and discussions, that overlapped strongly with the issues seen in the 2019 Membership Survey, and which helped inform the key themes. The top concerns are around the topics of:




1. Pay inequity & unpaid overtime
2. Right to vote in council
3. Long hours of work
4. Lack of public recognition

It is interesting to see the need for participation for Intern Architects at the council level. Being able to vote, opens up a major opportunity to slowly implement changes for the betterment of the profession. It is also crucial to note that each of the concerns are inter-related to one another.

The 2020 Roundtable document analyzed in this report was a culmination of two roundtables: one that included Intern Architects and Student Associates, and one that included Architects and Licensed Technologists OAA. Of the 14 recommendations received from the roundtables, there were few that specifically focuses on the interns. This suggests that the need to review all issues within the OAA through an EDI lens goes beyond issues related to Interns. Two recommendations related to Interns were a result of conversational topics considered the most pressing and common:

- Recommendation 9 suggested the OAA conduct a consultative review of the internship program by current and past interns and focused attention to equity.
- A pressing need to create more support groups that will inform internationally trained architects to transition into the IAP.

The chart on the following page groups the key issues found in all 3 analyzed documents under the three Major Themes, showing overlap from the documents between the themes:

-  **Professional Challenges**
-  **IAP Challenges**
-  **Job Opportunities & Networking**

2019 MEMBERSHIP SURVEY	2020 EDI ROUNDTABLE	2020 INTERN TITLE SURVEY
<ul style="list-style-type: none"> • Poor compensation & unpaid overtime • Work-life balance • Lack of public recognition • Restrictions at work • Concerns around insurance & liability • Balancing passion & profession • Lack of creative tasks • No benefits; licensed vs. unlicensed 	<ul style="list-style-type: none"> • Pay inequity & unpaid overtime • Right to vote in council • Long hours of work • Lack of public recognition • Inadequate health insurance 	<ul style="list-style-type: none"> • Term diminishes and undermines the Intern's experience • Term implies that the Intern works for free or is confined to short-term work • Term implies a lack of training and education
<ul style="list-style-type: none"> • Difficult to arrange for work in required categories • Process takes too much time • Family & parental leave • No measurable benefit in becoming licensed • Difficult to get credit for non-Canadian experience • Failed exams • Affordability of admissions course & exams 	<ul style="list-style-type: none"> • Lengthy licensure process • Need more assistance for internationally trained architects to navigate the IAP • Lack of credit for international experience 	<ul style="list-style-type: none"> • Majority of members unaware of discussions surrounding potential title change
<ul style="list-style-type: none"> • Difficult to arrange for work in required categories • Family & parental leave • No measurable benefit in being licensed • Difficult to get credit for non-Canadian experience • No measurable benefit in being licensed 	<ul style="list-style-type: none"> • Need more assistance for internationally trained architects to navigate the IAP • Lack of credit for international experience 	<ul style="list-style-type: none"> • Title doesn't accurately reflect experience

2019 MEMBERSHIP SURVEY

Breakdown of major themes addressed

No. of instances where a response under the correlating theme was recorded

No. of Responses	Themes
112	PROFESSIONAL CHALLENGES
56	IAP CHALLENGES
22	JOB OPPORTUNITIES & NETWORKING

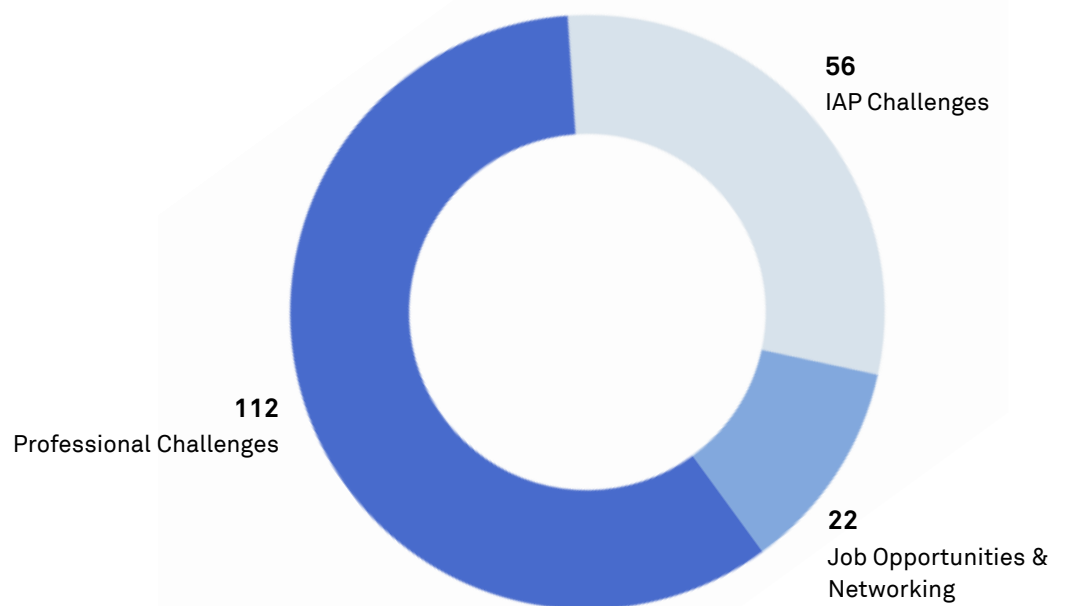


Fig. 1.20 Graph drawn by author

Note: The figures are indicative of the number of times each response was recorded.

2020 EDI ROUNDTABLE

Breakdown of major themes addressed

No. of instances where a response under the correlating theme was recorded

No. of Responses	Themes
28	EQUITY, DIVERSITY, & INCLUSION
26	PROFESSIONAL CHALLENGES
5	IAP CHALLENGES
5	JOB OPPORTUNITIES & NETWORKING

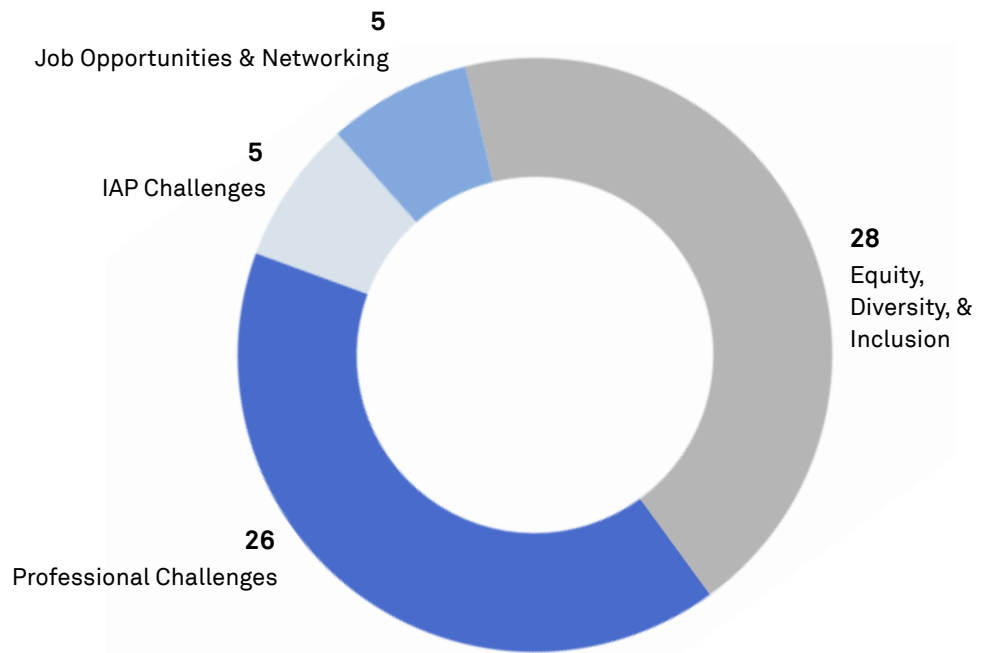


Fig. 1.21 Graph drawn by author

Note: The figures are indicative of the number of times each response was recorded.

2020 INTERN TITLE SURVEY

Breakdown of major themes addressed

No. of instances where a response under the correlating theme was recorded

No. of Responses	Themes
603	PROFESSIONAL CHALLENGES
176	IAP CHALLENGES
274	JOB OPPORTUNITIES & NETWORKING

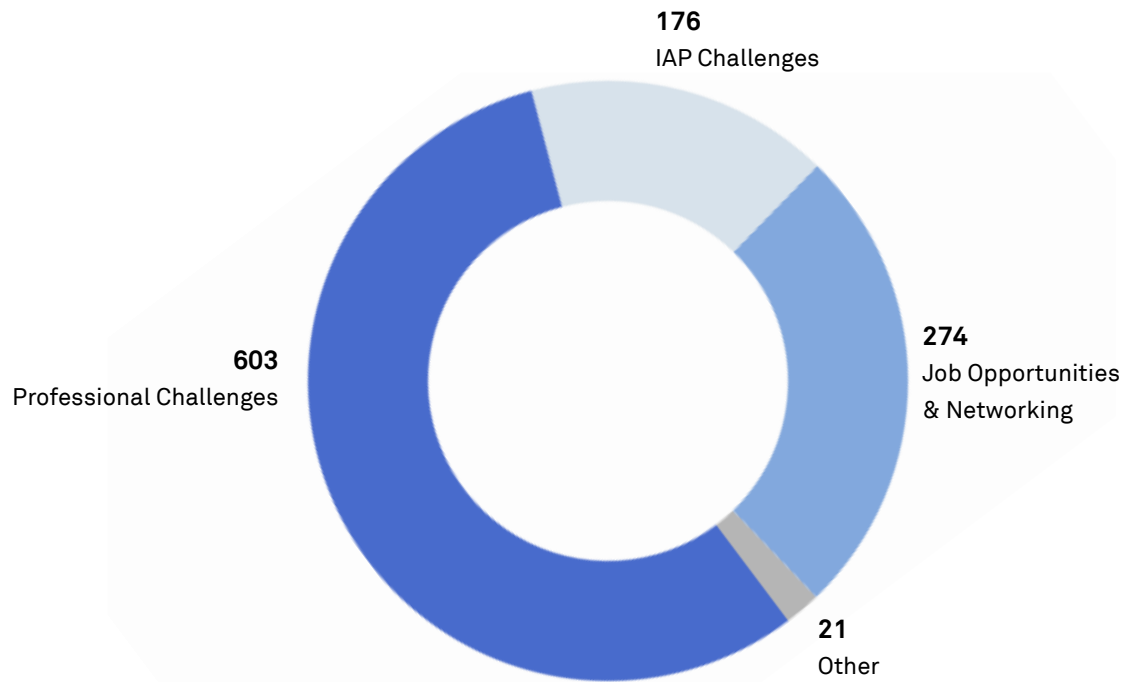


Fig. 1.22 Graph drawn by author

Note: The figures are indicative of the number of times each response was recorded.

Overlap in Theme: Professional Challenges

The graph of the 2019 survey shows the different types of challenges faced by the Intern Architects and the other members in the profession alike. The top three of the pressing concerns are around the themes of:

1. Poor compensation & unpaid overtime
2. Need for more healthy work- life balance
3. Lack of public recognition

The 2020 EDI roundtable shed new perspective to many of the same concerns that were discussed in the 2019 survey, through the lens of Equity, Diversity and Inclusivity. The top concerns are around the topics of:

1. Pay inequity & unpaid overtime
2. Right to vote in council
3. Long hours of work
4. Lack of public recognition

Addressing the professional challenges for Intern Architects as stated within this report presents a challenge in itself for those within the OAA wishing to make improvements. The range of practice within Ontario in design speciality, firm size, location, and a myriad of other factors is a natural result of the creative nature of the profession, and the mandate of the OAA is to regulate, rather than interfere.

However, as the provincial regulatory body, firms and practitioners will follow the lead of the OAA in terms of cultural moves and statements. Past and current Presidents, staff, and other leaders have taken public positions numerous times on behalf of its members, and the benefit of this collective voice cannot be understated.

For instance, it is interesting to see the need for participation for Intern Architects at the council level. Integrating and Intern Architect vote on council is one potential way to directly acknowledge and incorporate the experience of Interns.

Overlap in Theme: IAP Challenges

A vast majority of the responses discussed the many challenges faced in pursuing the Internship in Architecture Program. The top three responses recorded includes:

1. Difficult to arrange for work in the required category
2. Lengthy process
3. Break from profession due to paternal leave, maternity leave or any other personal leave

Another notable concern revolves around the lack of recognition in being an architect both in the practice and public side of the profession. This affects the outlook of the profession overall, which might potentially cause a gradual decline of people entering the field of architecture in the future.

While the IAP is directly overseen and regulated by the OAA, the program is one portion of a network of intern programs within Canada that work in parallel. Understandably, the process to make alterations to the IAP is not only a lengthy provincial legal process, but also one that must be undertaken in tandem with other jurisdictions under the Canadian Architectural Licensing Authorities (CALA) body. If changes are made to the IAP under the OAA that are confined to the province of Ontario, there is the risk of discrepancy and lack of mobility for the OAA's members throughout Canada.

Without making direct legislative changes to the IAP, there is the opportunity to address concerns of Intern Architects through more minor interventions.

Overlap in Theme: Job Opportunities & Networking

Declining job opportunities combined with inadequate networking platforms have been a major theme in both surveys alike. The architecture industry has always seen fluctuations in the job market and the current trends post pandemic has only amplified this condition. Feedback within the three documents does not clearly specify what aspects seem to be the root cause for this issue.

In the 2020 Intern Title Survey in particular, many responses were around the issue of finding steady employment. The Intern Architect title is a multifaceted one within the profession: while the vast majority of practitioners within the profession (individuals and companies that hold a legal OAA certificate of practice) are aware of the educational requirements for an Intern Architect and thus have an understanding of their knowledge and experience, from a public perspective this connotation is severely misunderstood. This results in a skewed perception of the work of not only the Intern Architect but the profession at large, presenting a very real potential barrier to employment.

Both the 2019 Membership Survey and the 2020 Roundtable report a wide range of difficulties in finding secure employment. This can be broken down into two main points:

1. Challenges to remaining within a workplace due limitations in flexibility (i.e. parental or health leave, precarity of the market)
2. Difficulty for foreign-trained architects to enter into the Canadian job market

While directly assisting those within the profession with finding employment is not within the mandate of the OAA and would understandably be a severe violation of impartiality, there are further resources and networking opportunities that are within the power of the OAA to provide and could fall under their scope.

Conclusion

The key issues and major themes in this report have been found through comparative analysis to contain much overlap. Recommendations made to address the challenges Interns face, and to emphasize opportunities for positive change based on the comparative analysis within this report would thus potentially address numerous challenges simultaneously. The following list of recommendations (Appendix I) is not an exclusive list of the recommendations based on this report; rather, the intention is that the research report continues to be used as a resource and directive tool for the Interns Committee to determine how to organize and prioritize work and goals.

The Recommendations chart is borne out of careful analysis of the documents studied, brought forth by the research working group that work to address the major themes highlighted in the research. They range from broad or systemic opportunities for change, to specific action items. These recommendations require varying levels of staff resources and council approval, but are intended to direct the work of the Interns Committee in the following year. The recommendations chart is broken down into the following headings:

Recommendation - outlines the action item in question, as well as supporting explanation.

Key Theme - indicates the major theme to which recommendation is tied, of the major themes identified in the research report, as well as individual issues identified across the 3 selected and reviewed documents.

Discussion - explains the relevance of the recommendation to the research report - this is where we should put direct quotes from the report & relate directly back

Additional Information - collates any other ongoing work or information relevant to the recommendation

Timeline - indicates the intention of when the recommendation will be enacted and approximate scheduling

Appendix II

BEcoming an Architect: Sustaining our Future (recommendations excerpt)

Immediate Action - means that action can be taken on this immediately within existing programs or by staff and is being done.
Ongoing - means that some action has already been undertaken to start addressing this however a more detailed action plan back to Council is anticipated
Hold for Consideration after National Validation Conference and in context of 2015 Council Priority Session

		Recommendation to Council re. Implementation of the White Paper Recommendations	Status Update
Recommendations: Focusing on Intern/Student			
1	The OAA Admission Course is one of the first instances in which interns deal directly with OAA representatives. This course can be used as a venue to welcome interns and provide them with support and contacts that they will need in their long journey to licensure.	Ongoing initiative as the ConEd Staff/ Registrar is currently preparing an Action Plan for the restructure the OAA Admission Course: format, media vehicle etc. Updated plan will be presented to Council to consider.	COMPLETE & ONGOING OAA Admission Course offered on-line, in-house or at Conference.
2	Better two-way communication and more inclusive attitude from the OAA. In general, there should be earlier communication with students regarding the IAP.	Immediate and Ongoing Action, communicate Engagement versus policing; focus on the Office of the Registrar; providing a clear structured framework for Interns. More presentations to schools being planned.	COMPLETE & ONGOING
3	Include a peer-elected intern on Council.	Immediate Action for Council to consider - a peer elected non-voting Intern Architect representative on Council, attending open Council only.	COMPLETE
4	Create more web-based communications to reach individuals, including tweets, and a Facebook page.	Immediate Action, Office of the Registrar and Communications increasing twitter for younger generation, and social media in an effort to engage the Interns and students.	COMPLETE & ONGOING

5	It is suggested that the OAA provide an introductory session through the schools to explain the nature of the profession and its commitments.	Immediate Action as the OAA is currently devising an introductory session to offer the schools.	COMPLETE & ONGOING
6	Students in schools should automatically be provided with student membership in the OAA and in their local Society, and should be encouraged to take part in the activities of both groups, particularly in the events arranged by the Societies.	Immediate Action -- Continue to strengthen communication to promote the availability of a free Student Associate membership with OAA. Hold for consideration: to incentivize the Societies to develop a student membership base (free of charge) with the OAA matching with funding of \$25.00 per individual.	COMPLETE (free Student Associate membership with the OAA) ON HOLD (free student membership with the Societies)
7	Upon graduation, schools should be responsible for submitting the students' credentials to CACB for accreditation and subsequently enroll students in the OAA as interns.	Immediate Action to reinforce communication. Perhaps through the CACB Certification Letter, a line could be added to encourage graduate to make application to the IAP in their jurisdiction. Staff to contact CACB to review the letter.	COMPLETE
8	A congratulatory membership application package included with each graduate's diploma to encourage early participation in the regulatory body.	Ongoing -- Upon CACB Certification, the OAA sends a congratulatory e-mail with a link to the IAP application. Staff to check on Privacy Issues.	COMPLETE Upon notification of CACB certification, the OAA sends an email to existing OAA Student Associates who are eligible to apply for intern architect status with the OAA.
9	Current Situation - Increase intern fees to incentivize licensure within 5 years. Proposal - Allow newly licensed Architects to pay the intern fee (less than 5 years in IAP) until the end of the 5-year period even if they have reached licensure before the end of the 5-year period. This will reward interns who move to licensure more quickly.	Hold the proposed formula for Consideration: to allow newly licensed Architects to pay the less than 5 year Intern Fee until the 5 year period is reached. Or, the following alternative: Reward the Firm; when you have an Intern that has been licensed within 5 years, the OAA will remove them from the CoFP Invoice. Incentivize both Interns and Practices	ON HOLD

	Create the possibility of pairing interns with mentors who share areas of special interest in architecture through establishing a database with short profiles of mentors.	Hold for Consideration: the OAA currently has a database of Mentors, however the OAA must continue to promote Mentorship as the list is short.	WORK IN PROGRESS Interns Committee working on strengthening the mentor/mentee process
Summary of Recommendations 6.2 Collaboration Profession/Education			
1	Involve the schools in providing continuing education for architects and intern architects;	Hold for Consideration: continue to promote adult learning opportunities through night courses at the universities as a vehicle for acquiring Continuing Education hours. This is likely a much longer term objective. We need to focus on interns for this exercise, not necessarily the continued learning for architects once they are licensed.	ON HOLD
2	Expand the presence of the Regulators in the Schools through increased workshops and seminars addressing professional practice and ethics as well as other less formal interactions such as small discussion sessions or facilitated opportunities for one-on-one conversations;	Ongoing Initiative for Council to task this to either the VP Regulatory or VP Communications to develop a strategy for collaborating on initiatives with the schools.	COMPLETE & ONGOING
3	Provide automatic student membership in the respective provincial association for those enrolled in accredited architectural programmes	Immediate Action. The OAA has a free Student Membership albeit not automatic re: Privacy Issues. The immediate focus is that the OAA shall strengthen its promotion of the free Student Membership.	COMPLETE Student Associate membership is free with the OAA.
Summary of Recommendations 6.3 Strengthening the Mentorship Relationship			

1	Create programs to promote awareness among practitioners of their important role and responsibility as mentors and employers in the Intern Architect Program and encourage broader and more positive engagement of professionals in the IAP process	This is an opportunity for the OAA to take a leadership role on all 5 of these recommendations. Hold for Consideration after the National Validation Conference and in context of the 2015 Priority setting exercise. Possibly establish a successor Committee to TIF to deal with these items.	ON HOLD
2	Consider developing a structure and framework for the employment of interns that would provide a model for hiring, mentoring and working with interns. Such a structure might include model language for an employment agreement to be signed by both the practitioner and intern that would deal with mutual expectations related to IAP issues;		ON HOLD
3	Consider provision of ConEd hours for those who agree to participate with interns in a structure such as contemplated by recommendation above.		ON HOLD
4	Develop a means for interns to provide general and constructive feedback on the quality of mentoring they receive;		ON HOLD
5	Recognize practices that create positive mentoring cultures through the provision of awards or designations tied to evaluation and participation in the more structured relationships contemplated in 3b).		ON HOLD
Summary of Recommendations 6.5 Intern Support - Inclusiveness with Regulator			
1	Allocate staff and financial resources to Intern liaison and advocacy;	Immediate Action: OAA communication is currently focused on Members only. OAA to incorporate inclusive communication to Interns as well. An elected place at Council will be substantive toward this goal.	COMPLETE & ONGOING

2	Foster and require intern participation on relevant committees, working groups and task forces of the regulator;	Immediate Action for Promotion. Include an Intern spot on most OAA Committees and Task Groups, wherever possible.	COMPLETE
3	Improve communication with interns using all available tools, particularly electronic and social media;	Immediate Action for Promotion and Guidance on an ongoing basis.	COMPLETE & ONGOING
4	Establish an "Intern Advocacy Committee" within each Regulatory body with the mandate of strengthening communication with interns, between interns and practices, and advising the regulators on intern needs and concerns;	Hold for Consideration. The Committee felt that having Interns, Architects, seasoned Practitioners around the table together was greatly beneficial. Create a Task Group whose Terms of Reference are the specific deliverables that Council wishes to address. Engage Interns in rolling out the recommendations and ensuring it moves forward. Proposed duration of Task Group - 2 years.	ON HOLD (Intern Advocacy Committee) Interns Committee is a permanent Committee of the OAA focused on strengthening the pathway towards licensure for interns and students.

INTERNS COMMITTEE COMPREHENSIVE RESEARCH REPORT

Appendix II: Recommendations

Item	Recommendation	Key Theme	Discussion	Additional Information & Resources	Timeline
1	<p>Publish the report to the entire OAA membership.</p> <p>This includes the 3 main documents reviewed (2019 Membership Survey; 2020 Roundtable on Equity, Diversity, and Inclusion; 2020 Intern Title Survey), along with links to the other available documents.</p>	Overall	Transparency of research and discussion is the utmost priority to the Interns Committee. It is our duty to keep our members informed of the status and completion of work being done on their behalf. This would include the report in full, the list of recommendations, the three appendices, along with a note regarding the status of those past initiatives taken and how they've been included within this report.	<ul style="list-style-type: none">• Interns Committee would work with the Executive Director and the Communications Committee to strategize the publication of this material.	Immediate
2	<p>Devise a system of tracking all recommendations and action items carried.</p> <p>This would include the recommendations of this report, as well as those made in previous reports or papers such as the 2014 BEcoming an Architect paper. All recommendations and action items must be combined in one central document with a consistent system of tracking progress and status.</p>	Overall	With this foundational report outing and collating challenges, issues, and opportunities related to Intern Architects, the next step is creating an accompanying system whereby all recommendations, discussions, and conclusions can be organized into one space for tracking. The intention is that there be regular and transparent review of recommendations, plans for inaction, and follow-up to check in on status and ensure success. This regular updating should comprise an ongoing portion of dedicated time from the OAA's hired architectural graduate, or other staff.	<ul style="list-style-type: none">• The exact model to be devised by the Interns Committee in conjunction with OAA staff.• Look at similar initiatives and projects within the OAA, i.e. EDI working group or the operational review, and software precedents.	Immediate & Ongoing
3	<p>Develop a calendar and list of priorities that include events and other resources specifically pertaining to Intern Architects.</p> <p>This would include unique news items for Interns as well as regular and standard updates on any and all Interns-related issues.</p>	Overall	Not only does this provide an update for Interns, but encourages communication between departments in the OAA about issues related to Interns, i.e. updates from CALA meetings, reports from the Executive Director, status updates from the IAP administrator, etc.	<ul style="list-style-type: none">• Work with the Communications Committee to develop internal calendars and tracking of Intern-related events, and inclusion wherever necessary or possible on e-bulletins, special news blasts, updating of website, etc.	Immediate & Ongoing
4	<p>Develop a series of Continuing Education webinars that provide Architects with more information and perspective regarding the Internship program, and the experience of Intern Architects.</p> <p>a) Develop a Continuing Education webinar with the Communications Committee to educate Architects about the IAP. Education to the membership about Interns-specific issues and challenges should happen at two levels. Secondly, a comprehensive overview of the Internship Architecture Program should be offered to members, with focus on the changes implemented in September 2020. This could be done as a stand-alone or series of webinars</p>	<p>Theme: Professional Challenges</p> <p>Key Issues:</p> <ul style="list-style-type: none">• Poor compensation & unpaid overtime• Work-life balance• Restrictions at work• Pay inequity & unpaid overtime• Title doesn't accurately reflect experience• Majority of OAA members unaware of discussions surrounding change to the title of "Intern Architect" <p>Theme: Professional Challenges</p>		<ul style="list-style-type: none">• Working with the CC and CEC to determine best place for a webinar: as a Con Ed, conference addition, etc.	

	<p>targeted to Architects, as well as the membership at large (for Intern Architects or Student Associates to participate in as a refresher).</p> <p>b) Develop a Continuing Education webinar on work-life balance and organizational strategies for architects. This would be part of the Continuing Education Committee on work-life balance for Architects to help them understand new generations of designers and the changing landscape, and specific issues faced by Intern Architects. This webinar can be a workshop focusing on multi-generational, collaborative feedback: hire an expert on organizational change to help interns and employers to understand each other, their generation</p> <p>c) Develop a Continuing Education webinar that specifically addresses the collection of hours within IAP category #15, “Construction Phase - Site” within the perspective of a landscape permanently altered by COVID. This would have the dual benefit of assisting Intern Architects in understanding the variety of tasks and opportunities available to gain those hours, but would also provide Supervising Architects and employers new insight into how to provide that crucial experience.</p>	<p>Key Issues:</p> <ul style="list-style-type: none"> • Poor compensation & unpaid overtime • Work-life balance • Balancing passion & profession • Lack of creative tasks • Process takes too much time • Family & parental leave • Inadequate health insurance 			
5	<p>Further investigate and develop opportunities to encourage higher numbers of female-identifying and minority members of the OAA to engage in mentorship with the IAP.</p>	<p>Key Themes: Job Opportunities & Networking</p> <p>Key Issues:</p> <ul style="list-style-type: none"> • No measurable benefit in becoming licensed • Difficult to get credit for non-Canadian experience • Need more assistance for internationally trained architects to navigate the IAP • Lack of credit for international experience • Term implies that the Intern works for free or is confined to short-term work • Term implies a lack of training and education 	<p>There are several ongoing and recently completed initiatives within the OAA that could work in tandem to address this issue: the EDI working group has similar objectives, and the 2021 mentorship survey as undertaken by the Interns Committee should be reviewed when completed to look for opportunities to forward this recommendation.</p>	<ul style="list-style-type: none"> • Work on in conjunction with the Communications Committee and EDI working group. 	
6	<p>The OAA take stronger action on pushing for exemption under the Employment Standards Act (2000).</p> <p>Further review of the ESA could be undertaken by a lawyer to understand its implications for Intern Architects working in the profession. Any changes proposed under the regulatory portfolio, can work with the strategic portfolio, and ask for feedback from council on which portfolio takes the recommendation to the Government Committee.</p>	<p>Theme: Professional Challenges</p> <p>Key Issues:</p> <ul style="list-style-type: none"> • Family & parental leave • Poor compensation & unpaid overtime • Pay inequity & unpaid overtime • Long hours of work • Term diminishes and undermines the Intern’s expertise • Term implies that the Intern works for free or is confined to short-term work 	<p>This directly addresses many of the comments and issues raised by Interns over the years of workplace issues such as unfair compensation, poor working conditions, etc. The OAA has advocated for revisions to the ESA a number of times, most recently with a letter from Immediate Past President Kathleen Kurtin suggesting removing specific regulations that apply to architects and students. President Susan Spiegel released a bulletin to all members on October 26, 2021 reinforcing the OAA’s position of condemning “unfair compensation” for Intern Architects and Student Associates. There is opportunity for the OAA to take more concrete action in support of updates to this legislation.</p>	<ul style="list-style-type: none"> • The Interns Committee can work with OAA staff (Policy and Government Relations department) to confirm steps that have already been taken and committed to, and form a strategy for going forward. 	1-2 years
7	<p>Council commit to changing the title of “Intern Architect” and commit to funding and/or resources to further study appropriate alternatives.</p> <p>Begin this secondary review with further analysis of the intern title survey, the environmental scan as outlined in this report, and devise a timeline for</p>	<p>Theme: Professional Challenges</p> <p>Key Issues:</p> <ul style="list-style-type: none"> • Lack of public recognition • Pay inequity & unpaid overtime • Title doesn’t accurately reflect experience 	<p>Much of the overlap in issues discovered within the Comparative Analysis portion of the report points to an underlying stigma attached to the Internship program within Ontario’s architectural profession, that can be</p>		1-2 years

	proposing the final title change.	<ul style="list-style-type: none">• Majority of OAA members unaware of discussions surrounding change to the title of “Intern Architect”• Term diminishes and undermines the Intern’s expertise• Term implies that the Intern works for free or is confined to short-term work• Term implies a lack of training and education	addressed head-on by a title change. Excerpt from the analysis of the 2020 Intern Title Survey: <i>Positive connotation of the title can still be maintained while also addressing negative: i.e. “Appropriate because it shows they are in the process of becoming Architects/Close to being Licensed/Training” is a great reason, we can maintain this while also addressing “Term diminishes and undermines our expertise and experience/Term is belittling”</i>		
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Memorandum

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 4.8

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Natasha Krickhan, Vice President Education

Ellen Savitsky, Manager, Education and Development

Date: November 30, 2021

Subject: **Update on mandatory Continuing Education on Equity, Diversity and Inclusion for the Cycle 2021-2022 and future plans related to mandatory programming for the upcoming Continuing Education cycles**

Objective: To provide an update on mandatory Continuing Education on Equity, Diversity and Inclusion for the Cycle 2021-2022 and to seek Council direction on future plans related to mandatory programming for the upcoming Continuing Education cycles.

Background

In December 2020, Council approved a recommendation of the Comprehensive Education Committee to introduce the mandatory requirement for a minimum one learning hour of accredited programming focused on Equity, Diversity, and Inclusion (EDI) for the Continuing Education Cycle 2021-2022.

The decision to introduce the requirement for this subject matter comes from, in part, the results of the most recent OAA Membership Survey where almost a third of respondents reported having experienced discrimination or harassment in the workplace. Similar concerns were further shared by participants in the OAA's Equity, Diversity, and Inclusion Roundtables in late 2020.

As a regulator, the OAA has a duty to investigate conduct that may contravene the *Architects Act*, including "Conduct or an act relevant to the practice of architecture that ... would reasonably be regarded by members of the Association as disgraceful, dishonourable, or unprofessional." However, only known issues can be investigated, and most harassment and discrimination go unreported due

to fear of the potential backlash and negative effects.

The matter of Equity, Diversity, and Inclusion is not limited to a specific project typology, firm size, or other aspect that may not apply to all those in the architecture profession. The topic is of fundamental importance for all those licensed to provide services to the public.

In implementing this mandatory requirement, Council did not expect having all licensed members attend an Equity, Diversity, and Inclusivity course would solve the problem. The approach was meant to promote discussions on the issue and educate members on both appropriate behavior as well as potential courses of action when faced with discrimination or harassment in the workplace.

Implementation

Internal conversations regarding viability and necessity of introducing a mandatory continuing education requirement on Equity, Diversity and Inclusion were held at different levels including staff, committees and Council, for a prolonged period of time. It was recognized that the implementation of the mandatory continuing education requirement would need to include the following steps:

1. Source an education provider that is suitable for the purpose of developing and delivering continuing education sessions on the topic of Equity, Diversity and Inclusion. This was based on the fact that it had been decided that the OAA would dictate which courses would meet this mandatory requirement.
2. Negotiate and reach an agreement to define parties' roles and responsibilities, project timelines, compensation terms and schedule, etc.
3. Define a development plan and delivery schedule that is mutually acceptable and viable.
4. Setup sessions' online registrations and related webpages.
5. Implement the necessary IT modifications to the online continuing education transcript, to ensure it is capable of keeping track of the mandatory EDI requirement for compliance purposes.
6. Develop a communication plan and related social media outreach to inform the membership of the newly introduced continuing education mandatory requirement.

In October of 2020, staff was directed to start a search for an education provider that would be appropriate for the task and fit the defined budget. The following agencies and institutions were reached out to during the planning and selection process:

1. University of Toronto, School of Continuing Studies (SCS)
2. The Canadian Centre for Diversity and Inclusion (CCDI)
3. Society for Human Resource Management (SHRM)
4. The Lavin Speakers Agency
5. National Speakers Bureau (NSB)
6. Turner Consulting Inc.

After meeting with prospective education providers and interviewing potential speakers, the OAA selected Turner Consulting Inc. to deliver a set of 3 continuing

education webinars on Equity, Diversity and Inclusion. The agreement was formalized in May of 2021. The first EDI webinars were offered on June 10, 2021.

In brief, it took 7 months of very pointed search and extensive negotiations to find the right provider and formalize the matter. Moreover, it took more than 9 months to actually start offering the continuing education webinars on the topic of Equity, Diversity and Inclusion (October 2020 – June 2021)

Solution/Outcome of 9 months of work.

The Association partnered with Turner Consulting Group, an organization that has been delivering a range of equity-related services primarily to non-profit and public-sector organizations for almost two decades.

To obtain the mandatory hour, part of the existing requirement of 25 Structured Learning hours, a member was required to participate in at least one of the following three webinars. Each is being offered many times (approximately 26 total offerings) throughout the 2021–2022 Continuing Education Cycle. These sessions are free to all those who hold status with the OAA.

1. Understanding and Minimizing Unconscious Bias in the Hiring Process

Research in neuroscience and psychology has highlighted the impact that unconscious (or implicit) bias has on our behavior and decisions. This impact extends to the workplace and is reflected in day-to-day interactions, in the hiring process, and in one's work. Tana Turner offers participants an introduction to help them better understand their biases and how they impact the hiring process, as well as how to structure the hiring process to minimize this.

2. Human Rights in the Workplace

Led by Brenda C. James, a senior practitioner in human resources and employment equity for 30 years, this session provides an overview of the Ontario Human Rights Code and the responsibilities of organizations, managers, and employees to foster a respectful work environment and address issues when they occur. Participants will learn about the various violations, the protected grounds, and options for resolving issues.

3. The Business Case for Equity, Diversity, and Inclusion

Tana Turner works primarily in the non-profit and public sectors to assess the equity, diversity, and inclusion efforts of organizations. She will review key demographic and social trends that will present challenges to OAA members, both as employers and as practitioners. This session also discusses the benefits of a diverse workforce and strategies for getting the best from this diversity.

Compliance to-date and Feedback from Members

As of November 2021, approximately 25% of the membership is compliant with mandatory requirement for a minimum one learning hour of accredited programming focused on Equity, Diversity, and Inclusion (EDI). We have offered 10 EDI webinars with the enrollment exceeding 1200+ registrations. The feedback has been very positive. Here is some of the comments provided by members:

"Informative. Thought provoking. Long overdue."

"Very enlightening presentation. I enjoyed it and found it very helpful."

"...I had some great take-aways, specifically how the Human Rights Code trumps the building code, and the concept of an "equity review" on our projects..."

"...I have participated in a number of similar learning events with a volunteer organization - this presentation likely the best I have experienced..."

"Tana gave a great presentation and delivered the information in a calm and confident manner. I enjoyed Tana's teaching and presentation style and shifted my perception about unconscious bias. I have attended a previous seminar many years ago about this content and I found it helpful to listen to Tana and have a refresher on the content ..."

It has to be noted, however, that not all OAA members were in support of the initiative. Some members have expressed their concerns to staff and the OAA President. The following are examples of typical comments:

"... I, as a person of colour, had objected to the idea that the OAA has made racial equity a mandatory subject of professional development. While I wholly support the OAA's position to ensure practitioners are aware of the matter, making it mandatory I found and still find, insulting. Had the matter be a subject of discussion and timely articles published by the OAA, and made available through some forums, it would not have been seen as a declaration of our profession being woke. However, I did appreciate the availability of a non-racialized course content in Ontario's Human Rights Code and the Commission in fulfilling the requirement..."

"... I'm taking a few moments to voice some opinions I have specifically relating to the compressed timeframe and same time requirement as for a typical 2-year cycle. I am aware of the extension of the previous year; I was still just able to meet the requirements with the extension. It would not appear that a sympathetic message is forthcoming from the OAA so I'm in a position of having to advocate for myself and others like me"

"I have to express my concern in term as the OAA forcing licensed architects to take diversity training. I've been witnessing the OAA go down this predictable path for the last year and I can only assume more programs of forced equity will be the norm in the future. I find it personally offensive that as a 54-year-old registered architect I require training to stop my natural racist or sexist tendencies. It's unfortunate the OAA is choosing to go down this path to appease the woke community. Fighting real racism is fine but this program is based on fake narratives and I won't have anything to do with it."

"... there were fundamental problems with both the material and the presenter. (1) Numerous examples provided that were described as "Unconscious" bias were not unconscious at all, but were overt bias bordering discrimination. (2) A definition of bias was not provided; definitions that differentiated between bias from discrimination were not provided. (3) The presenter routinely commented that perceptions of differences that created communication barriers is a form of unconscious bias, and that hiring personnel should look past dress and language. The presenter did not have an understanding of the audience..."

Non-Compliance Implications

It is worth reviewing the impact of noncompliance with any new mandatory continuing education requirements within the context of existing OAA procedures. If a member does not fulfill the minimum one learning hour of accredited programming focused on Equity, Diversity, and Inclusion (EDI) or any additional mandatory learning hours as determined by Council within the prescribed time they are considered non-compliant. This triggers a non-compliance fine which can result in cancellation of licence (and potentially Certificate of Practice) if unpaid by the due date. Additionally, noncompliance results in the member's name being forward to the Public Interest Review Committee (PIRC). Upon review, PIRC has the authority to dismiss that matter, issue a Caution or Undertaking or forward the matter to the Complaints Committee for consideration. Subsequently the Complaints Committee may also dismiss the matter, issue a Caution or Undertaking or refer the matter to Discipline.

Costs and Financial Impact

Total monetary investment for EDI webinars accounts for approximately \$30K.

Turner Consulting agreed to deliver twenty-eight (28) EDI webinars for the total fixed amount of \$17,000, taxes included. Related closed captioning services cost is \$12,000, taxes included. Considering the EDI sessions are complimentary for members, the OAA will receive no enrollment revenue.

The staff time is an important metric that has to be considered, but is difficult to quantify in this particular case. Overall, the project spans as follows:

- 9 months of preparation (Sept. 2020 – May 2021)
- 12 months of administration (June 2021- June 2022)
- 3-5 months of post- cycle administration (non-compliance phase)

Final Remarks

Overall, the introduction of the mandatory requirement for a minimum one learning hour of accredited programming focused on Equity, Diversity, and Inclusion (EDI) was received neutrally to slightly positive by the membership.

In cases of disagreement, the members were more concerned regarding the short notice and inability to comply within the defined timeframe. Another common comment was concerned with the fact that similar EDI courses that are offered by education providers other than Turner Consulting Inc. were not eligible to fulfill the requirement.

The implementation of the mandatory continuing education requirement, as it was executed, required 9 months of planning and preparation. Future similar initiatives have to take into consideration the existing projects and timelines that are expected to be met and delivered by staff.

It is suggested that if the Council wishes to implement other mandatory learning for future cycles thought be given to designation a topic that can be fulfilled by a

wide variety of courses, as opposed to the OAA mandating and delivering a short list of mandated courses.

As VP Education I would like to suggest that, if Council agrees that there be mandatory content for next cycle, Council consider offering a few sessions on that topic free of charge to members.

Action:

Action 1. That, based on the feedback provided regarding Council's decision to implement a topic of mandatory learning under the Continuing Education program, Council provide direction as to whether it wishes to continue this practice.

Action 2: If Council agrees to mandate an area of specific learning content for members under the Continuing Education for the next cycle, that Council identify the topic area in January and set the number of hour(s) required, and that it be implemented such that members may choose how to fulfill that requirement based on selecting their own session(s) and/or learning provider that is consistent with a set of criteria established by the OAA, and that it be self reported.

Attachments: None

Memorandum

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 4.9

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
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Andrew Thomson	Settimo Vilardi

From: Communications Committee

Jennifer King	Farida Abu-Bakare
Bill Birdsell	Carl Knipfel
Joël León	Elaine Mintz
Arezo Talebzadeh	

Date: November 19, 2021

Subject: OAA Conference – Keynote Recommendation

Objective: To gain Council's support for the Communications Committee's recommendation of Katharine Hayhoe as keynote speaker for OAA Conference 2022.

Background:

The theme of the 2022 OAA Conference is "Inspiring Climate Action," and it is scheduled to take place in Toronto at the Beanfield Centre from **May 11 to 13, 2022**. The conference will showcase creative ideas and sustainable projects that explore architectural thinking applied to the climate crisis, introducing a wide range of perspectives from diverse experts within the architecture profession and beyond.

The keynote event will be presented virtually in late March, almost two months in advance of Conference Week, as a way to launch registration. A Zoom webinar, it will be free and open to the public, with an anticipated attendance of 500 people, mostly from within the profession.

The keynote address is intended to embody the theme of the conference, "Inspiring Climate Action" and to generate excitement as registration opens for the May event. The Communications Committee sought candidates who could inspire those in the architecture profession and allied industries to take ownership over their role in shaping a more sustainable and just built

environment that responds to the needs of communities in the face of the urgent climate crisis.

Given this, the Committee is recommending **Katharine Hayhoe** as the 2022 Keynote Speaker. Hayhoe is a respected and renowned climate scientist who helps engineers, city managers, planners, and others prepare for the ways climate change affects all of us. A professor in political science at Texas Tech University, she directs the Climate Science Center, and is a lead author for the US National Climate Assessment and host of the PBS Digital Series *Global Weirding*. Hayhoe says, "I spend a lot of time talking to people about climate science, impacts, solutions and how they connect to our values." She's been named one of *TIME*'s "100 Most Influential People," *Fortune*'s "50 Greatest Leaders," and *Foreign Policy*'s "100 Leading Global Thinkers."

Hayhoe was selected for her engaging presentation style that blends broad expertise with levity and humour. Hayhoe has a knack for bringing the climate conversation back to the level of shared experiences, community, and connection. Rather than employing fear-based tactics, Hayhoe focuses on tangible actions and solutions, bringing motivation and hope to audiences, making her an ideal candidate to set the desired tone for the conference.

Action: Council to approve the Communications Committee's recommendation of Katharine Hayhoe as the Keynote Speaker for OAA Conference 2022.

Attachments: <http://www.katharinehayhoe.com/>
Katharine's TEDTalk can be viewed here:
https://www.ted.com/talks/katharine_hayhoe_the_most_important_thing_you_can_do_to_fight_climate_change_talk_about_it?language=en

Memorandum

To: Council

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Gaganjot Singh
Settimo Vilardi

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 4.10

From: Communications Committee

Jennifer King
Bill Birdsell
Joël León
Arezo Talebzadeh

Farida Abu-Bakare
Carl Knipfel
Elaine Mintz

Date: November 30, 2021

Subject: Suggesting a Policy for New OAA Awards

Objective: To gain Council's support for the Communications Committee's wording for a policy covering the creation of new OAA Awards.

Background:

The OAA Awards program runs on a two-year cycle, alternating between the Design Excellence Awards, Best Emerging Practice, and career achievement awards with the aspirational SHIFT Challenge program.

This cycle and the specific awards available are the result of a 2016 consultation that provided findings and recommendations on how the OAA could better adapt its program to opt for quality over quantity when it came to recognizing the achievements of the architecture profession. Amendments to the jury process at the time included bringing the review process online, revising the selection, and instituting a conflict of interest policy.

Given the extensive work to streamline the awards program, and taking into account ongoing work by the Communications Committee to ensure transparency, fairness, equity, and inclusion in the process, the decision to add additional awards should not be taken lightly. Any new award must be about recognizing a quality or achievement that is not currently celebrated and/or about improving the equity and diversity of those eligible.

Further, it must consider matters related to fairness, transparency, equity, diversity, and inclusion. The OAA must also not be swayed by commercial interests or financial motives.

As the Association currently lacks a well-defined policy over new awards, the Communications Committee, following Council direction, has created the wording in the attached appendix for consideration.

Action: Council to approve the Communications Committee's recommendation for wording of a policy related to the creation of new OAA Awards.

Attachments: Policy for New Awards Draft.doc



Council Policy

Policy Name	Creation of New OAA Awards
Issue Date	December 10, 2021
Revision Dates	N/A

OAA Awards Program Background

The OAA Awards program runs on a two-year cycle. It alternates between the [Design Excellence Awards, Best Emerging Practice, and career achievement awards](#) with the aspirational [SHIFT Challenge program](#)—an opportunity to show the public and the profession how architectural thinking offers innovative and creative approaches to societal issues.

The award cycle and the specific awards available are the result of a 2016 consultation that provided findings and recommendations on how the OAA could better adapt its program to opt for quality over quantity when it came to recognizing the achievements of the architecture profession. Amendments to the jury process at the time included bringing the review process online, revising the selection, and instituting a conflict of interest policy.

Given the extensive work to streamline the awards program, and taking into account ongoing work by the Communications Committee to ensure transparency, fairness, equity, and inclusion in the process, the decision to add additional awards should not be taken lightly. Any new award must be about recognizing a quality or achievement that is not currently celebrated and/or about improving the equity and diversity of those eligible.

Process for Creating a New Award

Whether internal to the OAA or external to the profession, any individual or group that wishes to suggest the creation of a new award should submit the idea to the [OAA Communications Committee](#), via an email to the [Communications Manager staff liaison](#), for consideration at its next available meeting.

Should the Committee feel the proposed award meets the various criteria outlined in this policy, it will, through the Vice President Communications, share the information as a memo for Council's consideration. While the Committee will make suggestions based on its evaluation of the proposal, ultimately the decision to move forward with a new award falls to OAA Council, which will also need to take into account existing staff and financial resources to ensure the sustained maintenance of an additional award.

Considerations for a New Award

Any new award must align with the objects of the Association (as determined by the *Architects Act*). The OAA's principal object is to regulate the practice of architecture and to govern its members in accordance with the Act, the regulations, and the bylaws so the public interest may be served and protected. Additional objects involve standards of knowledge, skill, and professional ethics, as well as promoting public appreciation of architecture and the allied arts and sciences.

A proposed award would need to meet new objectives, either in recognition or in eligibility, that are not currently being met by an existing award. It might address design issues and objectives as well as the evolving knowledge that fuels the profession that is not already possible among the existing award slate.

Further, new awards must be self-sustaining. Even those that do not come with a monetary prize require physical awards, invitations to recognition events, staff administration, etc. Council would need to take this into account for future budgeting. Entrance fees for a new award will consider the cost-benefit for applicants (Design Excellence currently has a fee, while SHIFT does not).

In some instances, a proposed award may be accompanied with financial donations. Such a contribution would need to be weighed against OAA values to ensure value-alignment. Additionally, only the OAA must be able to name its awards. Sponsored awards, regardless if by an individual, an estate, or an organization, can be risky for objectivity and reputation—especially if their name reflects a particular person or group. As such, funding donations may be more effective when added to a central pool for the entire awards program.

All these factors will be considered by the Committee when determining the need for a new award and whether to bring the information forward to Council.

Should Council agree to The OAA would retain control of the terms of any new awards, not the donor—this means only the OAA can set eligibility criteria. Similarly, award juries must remain impartial, so donors or champions for new awards cannot sit as jurors.



ITEM 4.11

**To Be
Distributed**

Memorandum

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 4.13

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Paul Hastings, VP Regulatory

Date: November 22, 2021

Subject: Proposal to revise Complaints Process

Objective: Seeking approval of the proposed changes to OAA's process in the consideration and investigation of Complaints.

Background

The requirement to effectively consider and investigate complaints into member or holder conduct is fundamental in maintaining the public trust in the professional integrity of the OAA's members and holders of Certificates of Practice.

Considering and investigating complaints is a core statutory obligations of the OAA, and a failure to adequately carry out this obligation invites unnecessary reputational, legal, and financial risk.

Increasingly, professional regulators are called to demonstrate its procedures and outcomes are transparent, objective, impartial and fair. While the OAA has had a long traditional of relying on volunteerism, recent shifts in the regulatory landscape require the professionalization of certain areas – specifically the handling of complaints and prosecution of misconduct.

A recent decision of the Supreme Court of Canada, *Canada (Minister of Citizenship and Immigration) v. Vavilov*, can be seen as a "recalibration of the governing approach" of administrative bodies, resulting in more scrutiny in the decision making processes of complaints and discipline committees that address member and holder conduct. In plain terms, this has meant less deference is being shown to regulators' decision making committees, as review courts are holding them to the same standard as other judicial bodies. Thus, the need for specialized knowledge and skill has become increasingly vital to the effective handling and prosecution of complaints.

The skills and knowledge required to investigate allegations of misconduct requires trained, neutral, and experienced investigators. The within proposal offers an explanation as to why the OAA should no longer rely on volunteer committee members to *conduct* investigations into member complaints and offers a modernized approach to the ways in which complaints can be considered and disposed of by Complaint Committee (CC) members.

The proposal will require additional resources; however, it would not require any changes to the Architects Act (the Act) or its regulations. The proposal will also bring the OAA in line with other modern regulators of high risk professions.

Proposal

In alignment with the strategic goals arising from the operational review adopted by OAA Council, a proposal for amending the process to address the risks noted above is set out in the attached document, *Proposal to Revise Complaints Process*.

The motion proposed would seek approval from Council to:

- Formally adopt and require a preliminary review process of each complaint, to be conducted by OOTR staff
- Require that all complaints that are referred to the Complaints Committee are supported by a third party investigator
- Eliminate monthly committee meetings and adopt a system of panels of 3-5 members to:
 - Approve investigation plan
 - Direct and oversee investigation
 - Decide on disposition of the complaint
- Formally adopt the decision making process for dispositions of complaints set out in the attached document, which includes using the attached risk matrix to guide decision making
- Require that a viability assessment by outside counsel be conducted prior to referring the matter to the Discipline Counsel

Benefits of the proposed approach

- Reduce processing timelines for complaints, thereby reducing risk of judicial scrutiny related to undue delay, and alleviating hardship on members who are the subject of complaints. The average time to deal with a complaint is 7 months. The new process is expected to reduce processing time by 2-4 months.
- Reducing the number of unnecessary referrals to the discipline committee, reducing financial costs to the OAA, financial burden on Members and legal risk of unsuccessful prosecutions. Currently the referral rate to Discipline is about 35%. Most professional regulators (e.g. LSO, CSPO) have rates of less than 10%.
- Professionalizes the investigation of complaints and reduces administrative burden on committee members. Allows committee members to serve as 'subject matter experts' on the profession, and focus their skills and knowledge more precisely and effectively.
- Aligns with the OAA's adoption of the right-touch approach – where solutions are proportionate to the risk they pose to the public.
- Enhances the public's confidence in the complaints process, thereby enhancing the reputation of the architecture profession.

Action: Seeking motion from Council to approve the attached process changes set out in the attached *Proposal To Revise Complaints Process* to enhance the OAA's process in the consideration and investigation of complaints about OAA members

Attachments: Proposal To Revise Complaints Process



PROPOSAL TO REVISE COMPLAINTS PROCESS

Claire Hepburn
NOVEMBER 2021

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Introduction

The requirement to effectively consider and investigate complaints into member conduct is fundamental in maintaining the public trust in the professional integrity of the OAA's members.

Increasingly, professional regulators are called to demonstrate its procedures and outcomes are transparent, objective, impartial and fair. While the OAA has had a long traditional of relying on volunteerism, recent shifts in the regulatory landscape require the professionalization of certain areas – specifically the handling of complaints and prosecution of misconduct.

A recent decision of the Supreme Court of Canada, [Vavilov](#), can be seen as a "recalibration of the governing approach" of administrative bodies, resulting in more scrutiny in the decision

making processes around member conduct. In plain terms, this has meant less deference is being shown to administrative bodies, as review courts are holding them to the same standard as other judicial bodies. Thus, the need for specialized knowledge and skill has become increasingly vital to the effective handling and prosecution of complaints.

The skills and knowledge required to investigate allegations of misconduct requires trained, neutral, and experienced investigators. The within proposal offers an explanation as to why the OAA should no longer rely on volunteer committee members to *conduct* investigations into member complaints and offers a modernized approach to the ways in which complaints can be considered and disposed of by Complaint Committee (CC) members.

The proposal will require additional resources; however it would not require any changes to the *Architects Act* (the Act) or its regulations. The proposal will also bring the OAA in line with other modern regulators of high risk professions.

This Proposal also provides an overview of the existing complaints process and provides an overview of enhancements that have been recently implemented.

The recommendations contained herein will offer the following benefits:

- More defensible outcomes, reducing exposure in appeals/ judicial review
- More robust investigations at the outset, eliminating unnecessary referrals to the Discipline Committee (DC)
- Greater alignment with a risk-based/ right-touch approach, resulting in more proportionate outcomes
- More streamlined process, reducing delay

Overview of two mechanisms for addressing member/holder misconduct

The OAA has two statutory mechanisms to address allegations or concerns related to a member or holder's professional misconduct. Section 38 of the Act affords the Registrar the authority to appoint an investigator to investigate when there are reasonable and probable grounds to do so.

The other mechanism is through the Complaints Committee. The powers and duties of the Complaints Committee (CC) are set out in at section 30(1) of the Act and require the CC to 'consider and investigate' written complaints. Excerpts from the Act are found at Appendix A.

The CC handles about 15 complaints a year and, on average, 4 to 5 complaints are referred to the DC each year.

There have been three Registrar Investigations (RI) commenced in the last 18 months. Two are ongoing and one was resolved when the member voluntarily resigned. In each RI, an appointment of investigator (AOI) is issued and served on the Member. For the last three investigations, the Registrar has appointed the firm of Barker Hutchison to conduct the investigation.

RIs are typically commenced when the Registrar receives information about a member that raises a serious concern about member (e.g., a stolen seal, criminal behaviour, or serious misconduct) and there is no formal written complainant. The proposal below **does not** seek to amend the current process for RI.

The Office of the Registrar also oversees investigations related to breaches of the Act. More information about same can be found [here](#).

Current Process for handling complaints about Members

The 2021 Complaints Committee Manual sets out, in detail, the OAA's current complaints process, in discreet stages. Excerpts from the manual are found at Appendix 'B'. The Proposal is primarily concerned with amendments to the Committee Review Stage. Prior to this stage, the OOTR will respond to any questions or concerns related to a member. Once a formal complaint is filed with the OAA, the OOTR will conduct a preliminary review to assess whether there is a jurisdictional and evidentiary basis to proceed with the complaint. If the complaint is not closed at the preliminary stages, the OOTR will facilitate an exchange of information process. The Member (Respondent) has 14 days to respond to the complaint. Thereafter, the complainant has 14 days to reply to the response. Generally speaking, if the Respondent has a history of complaints, that information is generally forwarded to the CC as well.¹

¹ In the event there is a history of complaints that is to be considered by the CC, that history should also be put to the Member for comment by the 3rd P investigator.

Once all material has been received, the documents (Complaint, Response, and Reply and conduct history) will be forwarded to a designated team within the CC. Teams are usually comprised of three members of the CC and, whenever possible, a more senior member is paired with newer members of the CC.

After the CC considers the materials, the following actions may be taken:

1. Additional clarification may be requested from any party to the complaint.
2. Arrangements may be made to inspect drawings as appropriate.
3. Arrangements may be made for interviews with the Complainant and/or the OAA member. Interviews are only held when the Committee determines that it is necessary.

The CC will then draft a case report, which is prepared by the team in accordance with a template. The template requires a summary of the documents reviewed, a description of the concern, and an analysis of the concern.

The CC is not permitted to make any findings. Rather their analysis must consider the following:

- *Whether the alleged conduct is serious enough to warrant a referral to the DC or other action; and,*
- *Whether there is a reasonable prospect that the OAA could prove the allegations if they went to the Discipline Committee.*

To refer a matter to the DC, the CC must answer 'yes' to both of the above questions. The case report will also include recommendations for a disposition. Dispositions can include:

- (a) referral to the Discipline Committee;
- (b) dismissal of the complaint; or
- (c) such action as it considers appropriate in the circumstances.²

'Such action' generally includes cautions, undertakings, and/or education.

Once the Case Report is prepared by the Team, it will be circulated to the CC and a team member will provide an overview of the findings for discussion at the next scheduled CC

² See *Architects Act* at s.30(2)(a)-(c)

meeting (CC meetings are held monthly, except in July and August where no meetings are held).

The CC has an opportunity to discuss the complaint, can either approve the recommended disposition, recommend an alternative disposition, or recommend that the investigation continue. If the investigation continues, a revised Case Report will be reviewed by the CC at the next available meeting. Once the disposition has been approved the Team will prepare the Decisions and Reasons, following the template provided. Generally speaking, the Decisions and Reasons will provide a more concise summary of the concern and analysis to support the reasons for the disposition.

In accordance with the Act, Decisions and Reasons are only required when the Complaint is dismissed.³ However, in practice, the CC will also deliver Decisions and Reasons when action is taken under 30(2)(c), if for example a caution, undertaking or additional education is issued.

Once the Decisions and Reasons have been approved, the OOTR will deliver a copy of same and a letter to both the Complainant and to the Respondent. The Complainant is also provided information about how to apply to the OAA Complaints Review Council (CRC). The CRC will assess the way in which the complaint was handled and cannot re-assess the outcome of the Complaint. No changes are proposed to the CRC process.

Deficiencies and concerns with current process

a) Need for professionalization of investigations

Conducting effective, fair and thorough investigations requires a highly specialized skill set and training. If the OAA fails to conduct appropriately thorough investigations, or misstates facts, all findings and recommendations flowing therefrom could be dismissed. This invites reputational and legal risk to the OAA and undermines the credibility and integrity of the complaints process.

While there is no singular process that must be followed when conducting an investigation, good investigations are based on eight fundamental principles:

1. Investigators must be as independent as possible.

³ See *Architects Act* at s.30(3)

2. Investigators must be trained and experienced.
3. All potentially relevant issues must be identified and, where appropriate, pursued.
4. Investigations must be sufficiently resourced.
5. All relevant physical and digital evidence must be identified, preserved, collected and examined, as necessary.
6. All relevant documentation must be secured and reviewed.
7. All relevant witnesses must be identified, segregate, where practical, and thoroughly interviewed.
8. The analysis of all the material gathered during the investigation must be objective and based solely on the facts.⁴

Currently, members of the CC are volunteers, who undergo one ½ day of training each year to familiarize themselves with the policies and procedures of the Complaints process. They are also introduced to concepts like bias, assessing conflicts of interest, and the evidentiary standards required for referral to the Discipline Committee. CC members are not trained in how to conduct investigations, nor are they given training on how to present evidence and write reports. As a result, the case reports often confound fact with opinion or conjecture, and the materials submitted by the complainant and respondent are often the only documents considered. In other words, it is uncommon to see additional interviews of the parties to a complaint, and even rarer still, the interviewing of third parties.

b) Timeliness (Delay)

While the Act does not impose timelines for the resolution of a complaint, the exigencies of procedural fairness require that regulatory bodies must administer complaints without undue delay. A finding of undue delay will depend on the facts of the case and the complexity of the prejudice suffered by the member being investigated. There have been recent developments in the jurisprudence to suggest 'one can expect more frequent and, possibly, more successful challenges based on abuse of process for undue delay in disciplinary matters.'⁵

The current set-up for the review of complaints would probably attract judicial scrutiny, particularly any delay caused by the need to reconvene on multiple instances. As noted

⁴ At page 9 of 'Undertaking effective investigations guide' Available online: https://www.investigationstraining.com/wp-content/uploads/Undertaking_effective_investigations_guide.pdf

⁵ "Invigorated" Undue Delay Scrutiny by Bernie LeBlanc available online: <https://canliiconnects.org/en/commentaries/72309>

below, the average time the CC takes to deal with a complaint is 7 months. There are, however, examples of complaints that have taken well over a year to resolve. This, of course, is not taking into account the matters that are referred to DC.

c) Lack of risk matrix

Currently, the CC is not required to use a risk matrix or any similar tool against which they can assess the seriousness of a complaint. As a result, the handling of complaints can lead to inconsistent and disproportionate outcomes.

d) Inappropriate referrals to Discipline Committee

Failing to conduct a thorough investigation adversely impacts the OAA's prosecution of misconduct. This would probably result in the expenditure of unnecessary resources (e.g. dismissals for lack of evidence, decisions being appealed on procedural or evidentiary grounds).

Additionally, without a formal risk matrix or any criteria against which the CC can assess the seriousness of the conduct, there is often a reluctance to identify any conduct as 'not serious enough to warrant a referral'. As a result, for matters where the evidentiary threshold has been met, this has likely resulted in matters being over-referred to the DC. In other words, the CC has lacked the framework and the tools to address member misconduct in more remedial ways, and which are more proportionate to the risk they pose to the public.

Recent enhancements

a) Working with Investigator

Since October 2019, the OAA has been working with a trained and experienced regulatory investigator, Sarah Marceau, to assist with complaints, on an ad hoc basis. Careful consideration has been given to the process for engaging the support of an investigator, and has been outlined in the CC Manual.

Sarah has assisted with 6 complaints between October 2020 and July 2021. Her experience and training are reflected in the timeliness and quality of the case reports she produces. The

teams who have worked with her provided unanimously positive feedback about the quality of her work.

Recently, in collaboration with Sarah, the OOTR has developed OAA Guidelines for conducting Statutory Investigations and Interviews of Witnesses, included below at Appendix C. Sarah has been helpful in handling a particularly demanding and vexatious complainant. Having the expertise to respond appropriately in highly contentious matters serves to enhance the OAA's reputation and will insulate it against any potential or future claims about the handling of the complaint

Preliminary Review

Beginning in late 2020, the OOTR began to formalize a more thorough preliminary review based on established criteria.⁶

With each new written complaint, a formal preliminary review will be conducted and, beginning July 2021, an Intake form will be complete. A copy of this form is attached at Appendix E of this proposal.

Where appropriate, the OOTR will explore alternative means of addressing the complaint, in a manner that is proportionate to the risk posed to the public.

Proposal

All complaints to be assigned an investigation⁷

Beginning in early 2022, it is proposed that all complaints referred to the CC will be assigned to an Investigator once the exchange of documentation is complete. The investigator will develop an investigation plan, that includes a list of witnesses to interview and seek the preliminary approval of same from the OOTR and final approval from a panel of CC members.

⁶ The OAA's Office of the Registrar may close a complaint after a preliminary review if:

- the evidence provided does not fall within the OAA's regulatory mandate or raise a regulatory concern;
- a further investigation by the OAA's Complaints Committee would not help to resolve or address the complaint or the complainant's concern;
- the information and documentation contained in the complaint does not provide a reasonable evidentiary basis to support the allegations;
- the allegations are the subject of concurrent criminal, civil or other regulatory proceedings (however a complaint may be re-opened once the other proceedings have ended).

⁷ By June 2022, the OAA will issue a request for proposal seeking additional investigators, with preference given to Investigators who are members of the OAA or have architectural experience.

Once the Investigator has completed the investigation, she will complete a summary of evidence (the Summary). The Summary, together with all supporting documents, will be provided to a panel comprised of no fewer than three members of the CC, by way of the OOTR.

Additionally, the Investigator will request that the Respondent confirm whether or not ProDemnity has been assigned to investigate an errors or omissions claim with respect to the same matter as the complaint. If yes, the Respondent will be asked to provide all materials relating to the investigation to avoid a duplication of investigative resources. Further the Registrar may exercise discretion to request that ProDemnity furnish to the Registrar any information that is in the possession of the insurer and that is specified in the request related to a claim or claims for indemnity in respect of the practice of architecture, in accordance with section 39(2) of the Act.

Creation of Panels

The Architects Act, at s. 29 (4) states 'three members of the Complaints Committee, of whom one shall be a person elected to the Council, constitute a quorum. As such, it is proposed that panels be comprised of 3-5 committee members (depending on the complexity and nature of the complaint), including one member elected to Council. The CC current has 18 members. It is proposed that at least 4 panels be constituted each year. Each panel would be need to have a member elected to Council to ensure quorum.

An enhanced orientation would be required in February each year, delivered by legal counsel, the Investigator and staff. Monthly CC meetings would cease and panels would meet when the investigation is complete, and after the panel members have had an opportunity to review the summary of investigation and the full case file.

Process for the Panel

The panel, OOTR staff, and the Investigator will meet (via Zoom), once the Summary of Evidence is complete and the Panel has had an opportunity to review the materials.

Step One:

The panel reviews and considers the Summary and supporting documents in advance of the meeting. The Panel will assess whether there is sufficient evidence to establish a reasonable prospect that the OAA could prove the allegations if they went to the DC.

Guiding factors for assessing evidence:

Overarching Question:

Is there clear, cogent and convincing evidence of the misconduct?

The Panel should consider the following for each or the articulated concerns:

- Is the information before them relevant to proving or disproving a disputed fact in the complaint?
- Note whether the evidence is hearsay (when a witness reports what a second party said). Direct evidence is always preferred.
- Best evidence rule requires the use of the most original source of any evidence (e.g. first-hand witness, original document, dated photograph, handwritten dated notes, emails, text messages)
- Is the evidence corroborated? If so, greater weight should be placed on this evidence. However, keep in mind that corroboration is not required.
- Evidence of similar past conduct (e.g. past history of complaints or discipline) will be considered an aggravating factor and relate to the seriousness of the complaint – not evidence that the misconduct occurred.

Once the above factors have been discussed and reviewed, the Panel will decide if there is sufficient evidence to warrant a referral.

If there is insufficient evidence, the Panel will decide whether to dismiss the complaint or consider whether additional investigation would be in the public interest to do so.

If the Panel is unable to reach a decision on whether the evidentiary threshold has been met, they may seek guidance from the OOTR and/or seek a prosecutorial assessment.

In some cases, where the conduct falls short of best practice, but does not rise to the level of misconduct, the Panel may consider issuing practice advice and make reference to any resources or education that the Panel considers appropriate.

Step Two:

If any of the concerns in the complaint meet the evidentiary threshold, they will be assessed according to the Complaints Risk Matrix, found below at Appendix D.

Each panel member will be asked to consider aggravating factors (i.e. factors which heighten the risk to the public) and mitigating factors.

The conduct itself will also be classified based on risk. For example, administrative offences are considered low risk and would require aggravating factors to require a referral to the DC. On the other hand, concerns affecting health and safety are considered high risk and, unless there were mitigating factors, the matter ought to be referred to the DC, when there is an evidentiary basis for doing so.

Careful considerations should be given to whether remedial action (e.g. a caution or undertaking) would address the misconduct and adequately protect the public.

If the Panel is unable to reach a decision on whether the matter is serious enough to warrant a referral, they may seek guidance from the OOTR and/or seek a prosecutorial assessment.

The decision of the majority of the Panel shall be considered the final decision of the panel (i.e. consensus is not required). More consideration and analysis is required where one or more panel member dissents with the majority decision.

Step Three:

If the consensus is that the matter should be referred to the DC, OAA staff will seek a viability assessment prior to reaching a final disposition. The purpose of the viability assessment (Assessment) is to confirm that the case is prosecutable and that the investigation is sufficient to meet the appropriate evidentiary burden to withstand a reasonable prospect of proving the allegations.⁸

Viability assessments may be obtained where the majority of the Panel is unsure whether or not to refer the matter to DC.

Step Four:

⁸ A viability assessment will not result in any additional expenditures by the OAA, since an assessment would occur if the matter was referred directly by the CC. The assessment would be done by the same prosecutor assigned to the matter, should it be referred to the DC. The assessment would also prevent unnecessary expenditures if the matter is not prosecutable. There has been a longstanding issue with the OAA of matters being over-referred to DC and this extra step will eliminate the risk of this occurring going forward.

Once the Panel has reached a final decision (i.e. no further investigation required), the Investigator will complete the Decisions and Reasons for any matter not referred to the DC.

Should the complaint be referred to the DC, the matter will be referred, in full.

Notes from the Panel should not be forwarded to the DC.

Additional Improvements

a) Data management and benchmarking

The OOTR has significantly enhanced the tracking of complaints to enable easier reporting on the number of complaints received per year, resolved per year, the length of time it took to resolve the complaint, the concern(s) listed in the complaint, and the outcome of the complaint. Improvements to data-management will allow for more evidence-based decision making. The OOTR is currently working to migrate the tracking of the complaints and discipline process directly into the existing IMIS database. This will allow for streamlined administration of the process and enhance the OAA's ability to harness and analyse data going forward.

Based on the OAA's existing records, data about complaints can be summarized as follows:

- Average number of complaints received per year is 15, with an average range between 8-22 complaints
- The average number of complaints that are referred to Discipline each year is roughly 4.5, or one third of the written complaints received.⁹
- The average length of time, from 2018 onwards, to resolve a complaint is 7 months

The OOTR shall continue to monitor the data once the revised process is implemented and trends would be noted. It is anticipated that fewer referrals will be made to DC, relative to the number received, and the average resolution time will be reduced.

⁹Many regulators, including CPSO set thresholds that no more than 10 percent of complaints should be referred to discipline. The LSO had similar referral rates.

Resource Implications

The additional resource implications of bring on a third party investigator have already been captured in the 2022 Council approved budget¹⁰. Based on a review of the cases to date, the average expense is about \$3,500 per complaint.

Assuming that the volume of complaints remains steady at an average of 15 per year, a conservative budget of **\$52,500 has be set aside**, per year. It is anticipated that some complaints will be resolved by way of preliminary review, which will require fewer resources to process.

/CH

¹⁰
Prepare Presentation & Attend Orientation Session - 3 hrs
Copying permit drawings or other drawings (Section 8(9) requests to AHJs)
Case Management (15 cases @ \$3500 each)
On-going legal advice (viability, process advice)

	1,000
	500
	<u>52,500</u>
	15,000
Total Miscellaneous	<u>69,000</u>
TOTAL COMMITTEE BUDGET	<u><u>\$75,265</u></u>

Appendix A: Relevant sections of the Act

Complaints Committee

29. (1) The Complaints Committee shall be composed of,

- (a) at least one member of the Council who was elected to the Council;
- (b) at least one member of the Council who was appointed to the Council by the Lieutenant Governor in Council; and
- (c) such other members of the Association as may be appointed by the Council. R.S.O. 1990, c. A.26, s. 29 (1).

Idem

(2) No person who is a member of the Discipline Committee shall be a member of the Complaints Committee. R.S.O. 1990, c. A.26, s. 29 (2).

Chair

(3) The Council shall name one member of the Complaints Committee to be chair. R.S.O. 1990, c. A.26, s. 29 (3).

Quorum

(4) Three members of the Complaints Committee, of whom one shall be a person elected to the Council, constitute a quorum. R.S.O. 1990, c. A.26, s. 29 (4).

Powers and duties of Complaints Committee

30. (1) The Complaints Committee shall consider and investigate complaints made by members of the public or members of the Association regarding the conduct or actions of any member of the Association or holder of a certificate of practice or a temporary licence, but no action shall be taken by the Committee under subsection (2) unless,

- (a) a written complaint has been filed with the Registrar and the member or holder whose conduct or actions are being investigated has been notified of the complaint and given at least two weeks in which to submit in writing to the Committee any explanations or representations the member or holder may wish to make concerning the matter; and
- (b) the Committee has examined or has made every reasonable effort to examine all records and other documents relating to the complaint. R.S.O. 1990, c. A.26, s. 30 (1).

Idem

(2) The Committee in accordance with the information it receives may,

- (a) direct that the matter be referred, in whole or in part, to the Discipline Committee;
- (b) direct that the matter not be referred under clause (a); or
- (c) take such action as it considers appropriate in the circumstances and that is not inconsistent with this Act or the regulations or by-laws. R.S.O. 1990, c. A.26, s. 30 (2).

Decision and reasons

(3) The Committee shall give its decision in writing to the Registrar for the purposes of subsection (4) and, where the decision is made under clause (2) (b), its reasons therefor. R.S.O. 1990, c. A.26, s. 30 (3).

Notice

(4) The Registrar shall mail to the complainant and to the person complained against a copy of the written decision made by the Complaints Committee and its reasons therefor, if any, together with notice advising the complainant of the complainant's right to apply to the Complaints Review Council under section 32. R.S.O. 1990, c. A.26, s. 30 (4); 2006, c. 19, Sched. B, s. 1.

Hearing

(5) The Committee is not required to hold a hearing or to afford to any person an opportunity for a hearing or an opportunity to make oral submissions before making a decision or giving a direction under this section. R.S.O. 1990, c. A.26, s. 30 (5).

DRAFT

Appendix 'B': Excerpts from Complaints Manual

1. INTRODUCTION

As the regulator of the practice of architecture in Ontario, the OAA handles complaints regarding the conduct or actions of a member of the OAA. The Architects Act, R.S.O. 1990, c. A.26 (the Act) prescribes the complaints process to ensure that the public interest in Ontario is served and protected.

A complaint may be made if there is concern that a member of the OAA (Architect, Licensed Technologist OAA, a holder of a Certificate of Practice, or holder of a Temporary Licence) has contravened the Act or has engaged in professional misconduct as set out in the Regulations (R.R.O. 1990, Reg. 27, s. 42).

The OAA's Complaints Committee (the Committee) exists to investigate and consider complaints regarding the conduct of an architect, Licensed Technologist OAA and/or a holder of a Certificate of Practice. The Committee's role is to determine whether a matter should proceed to the disciplinary stage.

The Committee does not make a finding of whether a member is guilty of professional misconduct or incompetence. Rather, the Complaints Committee performs a screening function by gathering relevant information. More information about the complaints process and possible outcomes of the process can be found below.

2. BEFORE FILING A COMPLAINT

If you have questions or concerns about an architect's professional conduct, we would encourage you to contact the Office of the Registrar at the OAA. In many instances, OAA staff can help address whether submitting a formal complaint is the most appropriate forum to address your concerns.

If you have questions or concerns about an OAA member's conduct, normally the first step is to talk to the member. If you are unable to resolve the issue, and believe there is a professional conduct or competency concern, please check the online directory to ensure the architect, Licensed Technologist OAA, or architectural practice is registered with the OAA. If the party in question does not appear in the directory, please contact the Office of the Registrar to let us know that someone is misrepresenting themselves as an architect or Licensed Technologist OAA.

If the person is not a member or the entity does not have a Certificate of Practice, the OAA cannot investigate the matter. However, through the Office of the Registrar, other actions may be taken to ensure that no person or entity misrepresents their qualifications or ability to offer professional services to the public.

Contact the Coordinator, Act Enforcement, Ms. Jakanah Sambavalingam 416-449-6898 Ext. 208 or jakanahs@oaa.on.ca with your questions.

3. FILING A COMPLAINT

Filing a formal complaint with the OAA is a serious matter. The complaints process should not be used for matters that are frivolous or vexatious, or to address other civil or commercial disputes that should be dealt with through legal avenues. The OAA does not have the mandate or authority to govern its memberships' contractual and business dealings.

The complaints process can be initiated via the OAA website's online form, by emailing complaints@oaa.on.ca, or a written submission mailed to the OAA. Please address written submissions to Ms. Christie Mills, OAA Registrar, under private & confidential cover, and include the following:

1. The name of the architect or Licensed Technologist OAA and/or the name of the Certificate of Practice.
2. The name and address of the project (where applicable);
3. A clear and concise statement of the specific complaint(s);
4. A copy of any Client/Architect Agreement or, if the agreement was oral, a statement of the Complainant's understanding of the agreement to provide professional services;
5. Copies of drawings, documents or other relevant material including meeting notes, invoices and other correspondence which substantiate the complaint(s).

If you are using the online form, be sure to scan, upload and attach all relevant documents and send them via email to: jakanahs@oaa.on.ca. Please make sure you clearly reference the complaint in the subject line (either by architect name or project).

4. PRELIMINARY REVIEW

The OAA reviews every complaint inquiry we receive, although we may not take action on all of them. The complaints process first point of contact is the Coordinator, Act Enforcement (Coordinator). The Coordinator will acknowledge the receipt of information and, together with the Registrar and Deputy Registrar, perform an initial assessment to identify if the matter raises issues that are within the OAA's jurisdiction.

The OAA's Office of the Registrar may close a complaint after a preliminary review if:

- the evidence provided does not fall within the OAA's regulatory mandate or raise a regulatory concern;
- a further investigation by the OAA's Complaints Committee would not help to resolve or address the complaint or the complainant's concern;
- the information and documentation contained in the complaint does not provide a reasonable evidentiary basis to support the allegations;

the allegations are the subject of concurrent criminal, civil or other regulatory proceedings (however a complaint may be re-opened once the other proceedings have ended).

If a matter is closed before proceeding to the Complaints Committee, the complainant will receive a letter from the Office of the Registrar explaining that the matter is closed and the OAA's reasons for closing it.

5. EXCHANGE OF INFORMATION Is email correspondence OK?

If the complaint is not closed after a preliminary review, you will receive a letter from the OAA acknowledging receipt of the complaint. Next steps are:

1. The OAA forwards your letter of complaint and supporting documentation to the architect or Licensed Technologist OAA to respond in writing within 14 days with regard to the issue(s).
2. The architect or Licensed Technologist OAA sends a letter of response. The member's letter of response is shared with the Complainant.
3. The Complainant has 14 days to reply to the OAA on matters pertaining only to the concerns of the original complaint.
4. All material related to the complaint is forwarded to the Complaints Committee for review and integrated into the Committee's scheduled meetings.

After this exchange of information is complete, no further documentation shall be accepted by either party, unless it has been approved or requested by the Complaints Committee.

6. COMMITTEE REVIEW STAGE

Once the exchange of information is complete, the matter will be referred to the Committee. The Committee makes every reasonable effort to examine all records and other documents relating to the complaint and decides if the nature of concerns raised in the complaint and the evidence in support of those concerns warrant a referral to the Discipline Committee.

The Committee process does not involve a formal hearing with a lawyer.

Who is on the Committee?

The Committee is comprised of volunteer architects, including at least one elected architect from OAA Council, and one person who is not an architect but a Lieutenant-Governor-in-Council appointee (LGIC). LGICs are appointed by the Province of Ontario.

Commented [CH1]: Yes – email has become the standard means of communicating with parties to a complaint.

Committee members are required to declare conflicts of interest. Committee members do not participate in the investigation of a complaint where a real or perceived bias could exist. **The unconscious bias course required**

After consideration of the material by the Complaints Committee, the following actions may be taken:

1. Additional clarification may be requested from any party to the complaint.
2. Arrangements may be made to inspect drawings as appropriate.
3. Arrangements may be made for interviews with the Complainant and/or the OAA member. Interviews are only held when the Committee determines that it is necessary.

Commented [CH2]: Unconscious bias training is worked into the orientation, however, we could require that CC members also take the OAA's separate course as a co-requisite to being on this committee (and probably DC, as well)

Appendix C: Complaints Committee Manual Update

Interviews

- All interviews will be conducted by a third party investigator (TPI).
- Should the team or committee have further questions after the summary of evidence is complete, inquiries will be made by the TPI, and coordinated by OOTR staff.
- The TPI shall follow the guidelines for conducting an investigation, as set by the OOTR.

OAA Guidelines for conducting Statutory Investigations and Interviews of Witnesses

These guidelines apply to investigations arising from the OAA's obligation to administer its statutory obligations, and includes: formal complaints into members' misconduct, Registrar's Investigations, and investigations into potential breaches of the Act, (e.g. holding out, unauthorized practice) ("Investigations").

These guidelines do not apply to workplace investigations, and other non-statutory investigations, however, they may be used as a reference, as applicable.

1. Unless and until the OAA hires a trained investigator, all interviews conducted in the course of an Investigation shall be conducted by a trained Third Party Investigator (TPI).
2. The TPI shall develop an investigation plan, that includes a list of witnesses to interview and seek the approval of same from the Office of the Registrar (OOTR).
3. Unless instructed to do so, the TPI shall *not* audio record the interviews of witnesses.

4. Should the OOTR instruct that the interviews be audio recorded, it's must be done with the knowledge and consent of the interviewee.¹¹
5. The TPI shall provide a summary of the interview (Summary) to the interviewee within 3 days after the interview, requesting that the interviewee confirm its accuracy in a form and manner prescribed by the TPI.
6. Format of the Summary: the TPI shall prepare a narrative summary of the information. This may include organizing the information provided chronologically or thematically as needed, and therefore the Summary is *not* an exact transcription (i.e., it doesn't follow a question and answer format).
7. The Summary shall be provided to the members of Complaints Committee delegated to consider the Complaint, by way of OOTR staff.

¹¹ A summary of the interview should still be prepared for the Committee's benefit and the audio recording is used as a "back up" if any details are disputed later.

Appendix D

RISK MATRIX – COMPLAINTS

General considerations:

1. The need to protect the public;
2. Matters of health & safety;
3. Any on-going risk, or the risk of repetition of the alleged failings;
4. Any past conduct that may indicate a pattern or likelihood of repeating misconduct;
5. The impact of the alleged misconduct/ incompetence has had on the client;
6. The complainant's circumstances e.g. particular vulnerability or ignorance of the building industry that required extra consideration;
7. Issues of professional practice that need to be considered by the OAA as a deterrent for other architects;
8. The health of the architect (both at the time of the alleged misconduct/ incompetence and at the point of investigation) and whether relevant evidence of any issues has been provided (this may trigger a duty to accommodate).

Category	Type of Conduct	Regulation	Risk Level
1. Member's Integrity	Illegal conduct/aiding and abetting illegal conduct, Fraud (signing false report or account of fees) Misrepresentation Breaching Confidentiality disgraceful, dishonourable or unprofessional Improper use of seal Lying on an application Becoming bankrupt Working with unauthorized practitioners	42.1 -42.7 42.14, 42.15 42.31 42.44, 42.45 42.54 42.18, 42.21-22 42.27 42.30 42.40-41	Medium-high

2. Member's Competence	Not applying reasonable skill and judgement Not meeting the performance standards with respect to general review	42.39 50	ALL
3. Adherence to regulatory requirements	COP's failure to adhere to performance standards Failing to abide by an administrative requirement Failure to co-operate Unauthorized participation in a competition	47,42.8-10, 42.8, 42.10, 42.20, 42.23-26, 42.29 42.28, 42.28.1, 42.49-50	Low-medium (except in cases where there is repeated and flagrant disregard for the requirements)
4. Conflicts of Interest	Having a conflict Accepting \$ other than a client Using services that are detrimental to the client's best interests Failing to act impartially	42.16, 43 42.37 42.43 42.43 42.46	Medium
5. Relationship to the Client	Unreasonable billing practices Unreasonable withdrawal of services Failure to meet contractual obligations Disclosing confidential client information	42.11,42.13 42.48 42.52,42.53 42.44	ALL
6. Relationship with other members	Competing with another holder without a fee Copying designs Soliciting work when other members are engaged Not complying with the standards in s. 49 – (changing architects)	42.12 42.34 42.47 49	Low-medium
7. Safety	<u>deliberate or reckless</u> disregard for the rights and <u>safety</u> of others disgraceful/dishonorable conduct (e.g. harassment, criminal behaviour) insofar as it puts others' safety at risk	42.38 42.54	High

APPENDIX E: Complaint Intake Form and Preliminary Review

To be completed before the document exchange process

Name of Complainant	
Name of Member	
Date of Preliminary Review	
Date complaint received	
Complaint Number	

1. Does Member have a history of complaints?

If yes, provide details:

2. Does the complaint raise a regulatory concern (i.e. professional misconduct, professional standards)?

If NO, forward to Deputy Registrar with a recommendation to dismiss the complaint on a preliminary basis.

If Yes, detail the relevant sections that are applicable to the complaint:

3. Are the allegations subject to a concurrent criminal, civil or administrative/ regulatory proceeding?

If YES, forward to Deputy Registrar for further review.

4. Are the allegations contained in the complaint supported by evidence (e.g emails, contract documents, witness statements, or detailed accounts of the incident(s))?

If yes, please list the evidence:

5. Has the Complainant raised concerns that may aggravate the complaint?

If yes, please select

If other, please describe:

6. What is the outcome of the Preliminary Review?

If Assigned:

- enter name of investigator
- Panel Assigned

If Dismissed, date the letter was sent to complainant (file closing date)

If held in abeyance, until when

Form Completed by:

Form Reviewed by

DRAFT

Memorandum

To: Council

Susan Speigel
J. William Birdsell
Barry Cline
Paul Hastings
Natasha Krickhan
Jeffrey Laberge
Agata Mancini
Elaine Mintz
Kristiana Schuhmann
Andrew Thomson

Farida Abu-Bakare
Heather Breeze
Gordon Erskine
Jennifer King
Kathleen Kurtin
Michelle Longlade
Lara J. McKendrick
Deo M. Paquette
Gaganjot Singh
Settimo Vilardi

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 4.14

From: Building Committee

Sheena Sharp, Chair
Andrew Thompson
Deo Paquette

Kathleen Kurtin
Gordon Erskine

Date: November 20, 2021

Subject: OAA Building Committee – Reserve Fund Study

Objective: To provide Council with the final report re. OAA Reserve Fund Study and obtain approval to adopt the findings and recommendations

As the OAA's building renovation was nearing completion, and in accordance with the OAA's Building Reserve Policy, a decision was made to conduct a building reserve fund study in the second quarter of 2021. The intent of the Building Reserve Fund is to provide a source of sustained funding for Capital Maintenance and Repair that cannot be otherwise funded in a single budget year through the OAA's existing annual operating budget for repair and maintenance of the OAA Headquarters.

An RFP process was conducted in order to select and engage an appropriate independent consultant to perform the work. As a result of that process, Keller Engineering was engaged and the work was conducted over the summer months.

An update on the status of the study and report was provided to Council at the September 2021 meeting. It has been noted that one final element was needed – the report from the elevator consultant, along with recommendations and options to update or replace – and then the report could be finalized for Council approval.

As a reminder, the final report includes the following:

- All major components of the building in terms of their specified durability, expected lifecycle and replacement value including but not limited to:
 - a. Landscaping
 - b. Hardscaping
 - c. Roof
 - d. Solar Panels
 - e. Mechanical Equipment
 - f. Glazing and Curtain Wall
 - g. Opaque exterior building envelope
 - h. Electrical systems
 - i. Interior Finishes
 - j. Elevator (*decision to modernize as opposed to replace has been made*)
- A detailed plan that captures the above in terms of timing of replacement and yearly funding required to meet those needs.
- Recommendation of inflation and interest rates to be utilized in the RFS plan.
- Definitions/explanations regarding when elements are considered faulty or to have failed.

It is noted that an amount/contribution to the OAA capital reserve has been already been included in the 2022 budget process at approximately \$154,000. The funding plan also anticipates a transfer being made at the close of 2021, dependent on whether a surplus is realized. Moving forward beyond these two considerations, a schedule of required annual contributions has been established as follows:

	2021	2022	2023	2024	2025
Yearly Contribution	\$274,156	154,000	\$157,850	\$161,796	\$165,841
Percent Increase to Total Yearly Contribution	N/A	-43.8%	2.5%	2.5%	2.5%
Starting Balance		\$519,735	Current Yearly Contribution		\$274,156
Critical Year		2021	Critical Year Balance		\$661,677
Assumed Inflation Rate		2.5	Assumed Interest Rate		2
Annual Capital Maintenance Budget Threshold			\$1,000		

The Building Committee recommends that Council receive and approve the recommendations of the Reserve Fundy Study as prepared by Keller and that the Executive Director be directed to monitor its adherence on a go forward basis.

Action: Council is requested to consider the following motion:

It was moved by.... and seconded by that Council receive the Reserve Fund Study as prepared by Keller Engineering and approve the recommendations regarding annual contributions to the OAA capital reserve in order to address the costs associated with the ongoing repair maintenance of the OAA Headquarters Building; and, that the Executive Director be directed to monitor adherence to those capital contributions as well as the elements of maintenance and repair of the major components of the building.

Attachments: OAA Reserve Fund Study



KELLER
ENGINEERING

RESERVE FUND STUDY WITH SITE VISIT
111 Moatfield Drive, Toronto, Ontario

FILE # 3210620
2021-11-30

PROTECTING PEOPLE'S BUILDINGS

OTTAWA TORONTO KINGSTON CALGARY EDMONTON

Executive Summary

Site inspection and component inventory were performed on June 30, 2021, by:

- Kenneth Andeza, Senior Building Specialist of Keller Engineering

Based on our site inspection, we recommend the following work be completed within the next 5 years:

Immediate or Ongoing Work

- Resurfacing of the asphalt pavement on the ground level covered parking area
- Replacement of the concrete walkway
- Resetting of the interlocking stone paver walkway
- Replacement of the fibre cement panels

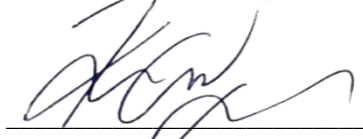
Within The First Five Years of The Study

- Replacement of the skylight
- Replacement of the electric unit heater
- Replacement of the jockey pump
- Installation of a backflow preventer onto the sprinkler main riser
- Modernization of the hydraulic passenger elevator

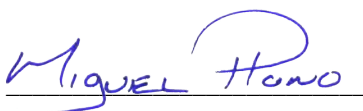
The following funding plan has been recommended to the Client to ensure the Reserve Fund remains adequate for the entire 30-year period of this study. It is based on the provided financial information as well as the below assumptions of economic growth and inflation.

	2021	2022	2023	2024	2025
Yearly Contribution	\$274,156	154,000	\$157,850	\$161,796	\$165,841
Percent Increase to Total Yearly Contribution	N/A	-43.8%	2.5%	2.5%	2.5%
Starting Balance		\$519,735	Current Yearly Contribution		\$274,156
Critical Year		2021	Critical Year Balance		\$661,677
Assumed Inflation Rate		2.5	Assumed Interest Rate		2
Annual Capital Maintenance Budget Threshold			\$1,000		

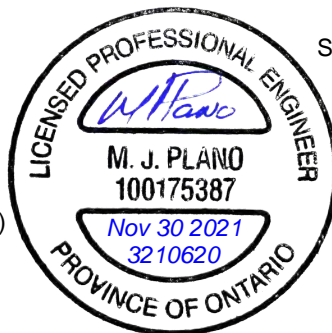
This Reserve Fund Study has been prepared by:



Kenneth Andeza, Senior Building Specialist



Miguel Plano, P.Eng. (Mechanical & Electrical)



Steve Christison, P. Eng. (Architectural & Structural)

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4.3	Fibre Cement Panels			
4.4	Curtain Wall System			
4.5	Fenestration System			
4.6	Roofing System			
4.7	Sealants			

Description of Property

111 Moatfield Drive, Toronto, Ontario is approximately 0.77 acres and is developed with a single-tenant, three-storey commercial office building and currently occupied by Ontario Association of Architects. The building was reportedly constructed in approximately 1991 and has a reported total building area of 22,297 square feet (ft²).

The substructure of the building is constructed with cast-in-place concrete slabs-on-grade on the main stairwell and utility rooms on the ground level and cast-in-place concrete foundation walls. There is no basement level in the building.

The superstructure of the building is constructed with steel frame support structures (i.e., consisting of columns, beams, trusses, cross-bracings, and open web steel joists) and concrete columns supporting composite floor slabs (i.e., profiled steel deck overlain with concrete) and fluted steel roof decks.

The exterior wall systems of the building consist of insulated vertical aluminum panels, curtain wall systems, and exterior insulation and finish systems (EIFS). The columns on the ground level have been cladded with fibre cement panels.

The main, upper, and lower-level roof systems consist of a protected membrane roof assembly with modified bitumen roof membranes installed on fluted steel roof decks.

Areas of asphalt paved driveways and parking areas, interlocking brick paver driveway, and interlocking stone paver walkway are located throughout the site. There are approximately 45 parking spaces (31 covered parking areas on the ground level).

Areas of soft landscaping (i.e., grass, shrubs, planters, trees, etc.) are located on the north and west perimeters and east and south portions of the site.

Heating and cooling to the building is provided by a combination geothermal and hydronic solar loop system, water-to-water heat pumps to provide heated and chilled water to fan coils in the building's perimeter.

The main hydro equipment consists of a concrete pad mounted municipal transformer located on the northeast portion of the site. The Federal Pioneer 1,200A 240V main fused disconnect switchgear is located in the main electrical room on the ground level, which protects and isolates the main electrical feed into the building.

The building underwent significant renovations to meet net-zero carbon emissions targets, which were completed in 2018/2019.



Figure 1: Aerial view of the property.

Building Elevations



General view of the north elevation of the building.



General view of the east elevation of the building.



General view of the west elevation of the building.



General view of the south elevation of the building.

Based on our site inspection and review of the supplied documentation, the component inventory consists of the following systems:

- Site Services and Infrastructure
- Site Features
- Building Structure
- Building Envelope
- Interior Finishes
- Mechanical Systems
- Ventilation Systems
- Plumbing Systems
- Electrical Systems
- Emergency Power Systems
- Lighting Systems
- Fire Protection Systems
- Security Systems
- Elevator Systems

References

The following documentation was supplied by the Client:

- Consultant Reports
 - Appraisal Report; dated 2021.04.27; Bosley Farr Associates Ltd.
 - Thermal Evaluation of Protected Membrane Roof Assembly Report; dated 2018.02.28; NRC
 - Site Inspection Report - East Wall Remediation; dated 2020.04.17; CoEfficient Building Science
 - Elevator Reserve Fund Study; dated July 2021; Rooney, Irving & Associates Ltd.
- Financial Documentation
 - Auditor's Financial Statements Fiscal Year 2020; dated 2020.11.30; Grant Thornton
 - OAA Operating and Budget; dated 2020.10.23
- Drawings
 - Architectural Drawings; A2-A7, A20-A22, A30-A38, A40-A57, A61-A68, A70-A73, and A80; Issued for Building Permit Revision No.4; dated 2019.03.18
 - Mechanical Drawings; M001, M101, M102, M103, M104, M111-M114, M121-M124, M201-M203, M211-M216, M221-M224, M230-M233, M301-M302, M401, M411-413, and M421; Issued for Permit; dated 2017.07.21
 - Additional Mechanical Drawings; M211-M212, M214, M230-M231, and M303; Re-issued for Permit; dated 2018.03.06
 - Electrical Drawings; E1.0, E3.0-E3.2, E4.0-E4.3, and E5.0-E5.1; Issued for ESI-10; dated 2018.12.04

Frequently Asked Questions:

What is the Purpose of a Reserve Fund Study?

The Reserve Fund Study is a regular undertaking to set annual contributions to the Reserve Accounts so as to ensure sufficient funds are available to fund the major repairs and replacement to the common elements of the condominium as they become due.

The COMPREHENSIVE STUDY is provided in 2 sections, the Technical Assessment, where common elements are assessed and evaluated for remaining service life and the Financial Assessment where the priorities of the building and are scheduled and budgeted for planning purposes.

How does Keller approach this?

Keller Engineering has provided Reserve Fund Studies to complexes in Ontario since 1986. In our over 3 decades of reporting, we have developed the skills, practice and experience required to assist complexes in approaching their planning and financing requirements in a manner that takes into account the objectives of the client along with the needs of the complex.

Throughout this report, tips are identified for important suggestions or guidance to the complex.

How should you read this report?

The report is separated into building systems and elements. Each section provides a description of the element, and a table summarizing the following information:

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					

Furthermore, each section includes photos of general condition and identified defects and recommendations regarding further inspections.

How should you read the spreadsheet?

The spreadsheet, included in Appendix A, is a visual representation of the repair and replacement scheduling along with our recommended plan over the period of the study.

Expenditures are shown per element type as un-inflated present worth values for ease of comparison of the values of the projects. Then, all expenditures within one fiscal year are tabulated so they can be inflated to future worth values for forecasting the future costs at the projected time of the expenditure.

Our recommended contributions to the reserve fund are determined through an iterative process and are provided for the following three fiscal years. For the period following this adjustment period, the contributions are set to increase at the inflation to ensure the reserve fund remains adequate for the entire scope of the study

The reserve fund balance is evaluated at the end of each fiscal year and is determined by examining the balance at the end of the previous fiscal year, subtracting the future worth expenditure, and adding the forecasted contribution and the estimated interest earned in that fiscal year. At the end of the spreadsheet, the remaining reserve fund is shown in current dollars to provide a better perspective of the fund balance at the end of the study period.



KELLER TIPS

- RFS spreadsheets are a tool to inform your annual budget.
- Complexes must increase the values in this report by inflation if they are using the estimates for individual project budgeting.

How does Keller confirm what elements are included?

The technical assessment process will develop a Component Inventory, which is the list of the assets that will require major repair or replacement of the life off the complex. This list is developed by several means:





- Review of available as-built drawings to better understand the elements,
- Site evaluation and interviews with stakeholders will identify assets such as equipment and furniture, that would not be identified in building plans.

How does Keller establish condition of the elements?

A site inspection is performed during the technical assessment to estimate the general condition of the building elements.

Conditions are evaluated based off multiple factors including age of the element, signs of degradation, signs of premature deterioration, and professional judgement. Furthermore, any non-reserve fund reports that have been provided to Keller regarding condition of an element, such as a roof condition assessment, will be reviewed and considered during the technical assessment.

Conditions are rated as follows:

-  Good – The element generally exhibits little to no deterioration and is expected to last or exceed its estimated full life cycle, assuming regular maintenance and no change to its general environment.
-  Satisfactory – The element generally exhibits minor deterioration, in line with its age and is expected to last its estimated full life cycle, assuming regular maintenance and no change to its environment.
-  Fair – The element is serviceable although there is evidence of collective degradation or deficient operation. Major repairs may be required within the next 5 years.
-  Poor – the element is either at the end of its life cycle or there is potential for imminent failure. The element may be inoperative or exhibit total failure and immediate repairs or replacement may be required.

Many elements, such as mechanical and electrical equipment components and infrastructure, are largely obstructed from full view or are assessable during a general reserve fund study site visit as such, the conditions of these elements are heavily weighted towards age relative to overall life expectancy and any information obtained through 3rd party reports.

The condition assessment of the common elements is based upon visual examination only. Neither destructive testing nor performance monitoring are conducted.

How does Keller establish the type of recommended repair or replacement?

Elements can have multiple repair or replacement options; however, the Reserve Fund plan will focus on the options that, in Keller's opinion, are most appropriate given the age and time to replacement of the elements. Alternative repair or replacement options may be selected in the future that might impact the contribution levels.

Timing of repairs are based on the estimated remaining service life, urgency of the intervention, and funding constraints of the complex.

Depending on the condition or type of element, repairs or replacement may be envisioned and funded as full projects, such as a roof membrane replacement, or as an allowance whereby a portion of funds are put aside at regular intervals to ensure a portion of the element can be addressed as the needs arise. These allowances are scheduled and funded such that sufficient collective funding is available over the life of the element to ensure a full renewal of all portions, regardless of when they are scheduled.



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- Elements are reviewed on a sampling basis, the scale of which is dependent on the element type and professional judgement.
- Where each boiler may be reviewed, only a representative portion of a brick veneer would be reviewed.
- Reserve Fund Study inspections are not meant to be an exhaustive inspection of every element and cannot be relied upon to have full assessed the condition of any element.

How does Keller establish the timing of the repair or replacement?

When determining the timing of expenses, several factors are reviewed, and each factor is graded on its importance. The factors include

- i) The risk to the complex if there is an imminent failure of the component
- ii) The ability to maintain the component in an effective and usable state
- iii) The complex's wishes to update a component

In most cases, expenses for each element have been budgeted for the specific fiscal year in which the repair or replacement will likely be required. If possible, repair or replacement of the elements will usually be performed throughout the complex for one year rather than spreading the repairs out over a few years as this is generally the most cost-effective solution. For cases where repair or replacement of a building component is not required throughout the complex at the same time, it may be more cost effective to phase the work over two or more years. Phasing the work may also be necessary due to a lack of funds.



KELLER TIPS

- Judging priorities is not always easy. Many clients want a lobby refurbishment. Most clients want potholes repairs. All clients always want hot water.



KELLER TIPS

- Life expectancy projections for the elements assume that the complex will provide satisfactory and timely periodic maintenance. The study does not make allowances for the effects of rare events such as flood, fire, lightning, explosions, earthquakes etc.

How does Keller establish the price of the repair or replacement?

The procedures for determining repair/replacement costs of the elements involve site inspections, quantity take-offs from drawings, cost estimations, and a spreadsheet layout which are described in detail in this report.

Once the type and quantity of repair or replacement work are known, the costs associated with such work are estimated. Keller Engineering has developed an extensive listing of unit costs for a wide variety of repair and replacement work involving all civil, structural, architectural, and electrical elements that are typically included in Reserve Fund Studies. This listing was compiled using prices obtained from repair and replacement contracts in which Keller Engineering has been involved, cost estimates provided by manufacturers, suppliers and contractors, and published pricing data.

For unique repair or replacement items, advice is generally obtained from a contractor with experience in the work of concern. In such cases, the contractor examines the work and prepares an estimate for our use in the Reserve Fund Study.

Unless requested, all costs assume that the Contractor performing the work will have full access to the work site for the entire duration of the project and no special considerations have been provided to allow continual use or access of the work area by the unit owners.

Replacement costs are typically based on like-for-like with a similar asset unless code or other circumstances require the replacement cost to include an upgrade.

Estimates of costs are Class D estimate intended for planning purposes and not for accounting or tender use. Estimates assumed economies of scale will be achieved by bundling of work tasks where appropriate. These estimates include some reasonable allowance for site specific access requirements, where assessable and appropriate, but do not account for environmental concerns, which should be evaluated on a project specific basis.

Costs are subject to other variances in the market. Costs may vary depending on time of year, contractor availability and other factors.



KELLER TIPS

- Estimates must be updated over time, further developed for scope of work, and confirmed by competitive pricing. Detailed repair specifications are often required to in order to confirm scopes of work and costs.
- Allowances for soft costs, such as consulting services and contingency allowances are included in the budget estimates.

Is there a contingency built into the estimates?

In our experience the function and needs of the reserve fund will vary significantly even over 3-year planning intervals. As such, in lieu of building in direct contingencies to every element, we have provided an annual contingency on all expenses varying between 5-10% in the first 3 years of the study, where price fluctuation most commonly affects funding plans. This contingency

can be used to fund potential shortfalls in estimates or mitigate the impact of elements that require replacement earlier than anticipated.

If the contingency is not used for any specific project, it is captured in the reserve account and will serve to increase the fund balance when updating at the next planning interval.

How far into the future does the plan project?

As requested by the Client, the requested scope was for a 30-year study. Keller Engineering projects expenses for a timeframe 15-years beyond the 30-year plan. Financial plans will be presented that will meet the necessary funding requirements of both the 30-year plan and the period 10-years beyond. It is common that a financial plan that only meets the 30-year period will not be sufficient to prevent a deficit occurring in the 10-years beyond the scope of the study. The Board of Directors may elect to proceed with a funding plan which exhibits a deficit beyond the 30-year plan with the knowledge that a significant increase to the contributions may be required upon time of the next Reserve Fund Study.

What inflation rate is used?

A 30-year annual inflation rate of **2.5%** has been used in this report. This rate is based on annually published data by Statistics Canada relating to the construction price index for residential buildings in the local region.

While the increase in construction costs will fluctuate from year to year, an annual rate of **2.5%** will likely provide a reasonable representation of how prices will increase over the scope of the study.

What interest rate is used?

For this Reserve Fund Study, a 30-year **2.0%** interest rate was assumed in calculating the annual contributions from interest earned on the reserve fund balance.

While actual inflation and interest rates may differ from those assumed for this report, the above rates, in combination, should be representative over the next few years.

Is there a minimum fund balance that the plan should not go below?

An adequately funded reserve fund will maintain a reasonable minimum balance throughout the study. This year in which the minimum balance occurs is the Critical Year. This value of this minimum balance is developed in conjunction with the board of directors and based on the size of the building, the timing of the critical year, and the quantity of work forecasted in the near-term.

For this report a minimum balance of **\$200,000** was used.

How does Keller determine future funding requirements?

The purpose of the spreadsheet is to determine the annual reserve fund contributions required to ensure that there will be sufficient funds to pay for all foreseeable expenditures over the period of the study. To determine the total expenditures to be incurred in each fiscal year, the projected expenditures are entered into the spreadsheet, summed, and adjusted for yearly construction cost increases.

Trial values for the annual reserve fund contributions are entered into the spreadsheet and through an iterative process the most appropriate annual contributions are determined and used to establish the 30-year funding plan. The iterations account for annual expenditures, annual contributions from owners' monthly fees as well as contributions from investment interest earned on the unused balance of the reserve fund.

The most appropriate contribution ensures that sufficient funds are accumulated in the reserve fund to cover all anticipated expenditures as they come due while leaving a surplus at the end of the study period. The size of the surplus depends greatly on the individual complex and on the expenses that are to be incurred beyond the study period. Complexes which are expected to incur large expenditures shortly beyond the study period should have a large surplus.



KELLER TIPS

- Provided the Critical Year falls outside the 3-year funding interval, a secondary iteration may be useful to identify theoretical funding adjustments made by in future reserve fund studies.

1.0 Site Services & Infrastructure

1.1 Water and Wastewater Infrastructure



Description

The underground services which include sanitary and storm water piping systems, water mains, supply lines and electrical services are situated beneath the building.

Recommended Inspection:

- Camera inspections be performed in every 5 years.



KELLER TIPS

- Sewer cleaning be performed in every 10 years.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Water Mains and Supply Lines	Various Locations	Varies	1991	40-50		Major Repairs	\$20,000	2041	1	20
Sanitary Sewers	Various Locations	Varies	1991	40-50		Major Repairs	Included Above	2041	1	20
Storm Sewers	Various Locations	Varies	1991	40-50		Major Repairs	Included Above	2041	1	20

2.0 Site Features

2.1 Pavements, Pavers & Concrete Curbs

Description

Access to the property is provided by an entranceway from Moatfield Drive located on the southeast corner of the site.

The driveways and parking areas consist of asphalt pavements, which are located on the ground level (covered parking areas) of the building and on the west portion of the site.

The main entrance driveway consists of interlocking brick pavers, which is located on the south portion of the site.

The driveways and parking areas are bordered with concrete curbs.

Based on information provided by the Site Representative, a partial replacement of the asphalt pavement located on the west portion of the site was completed in 2019 (~ 2 years ago) as part of the installation of the geothermal loop system.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Asphalt Pavements	Ground level (Covered Parking Area)	755 m ²	1991	15-20		Resurfacing	45,000	2021	1	15
Asphalt Pavements	West Portion of the Site	600 m ²	2019	15-20		Resurfacing	36,000	2034	1	15
Asphalt Pavements	Various Locations	Varies	Varies	15-20	-	Localized Repairs	Annual Capital Maintenance Budget	2021	1	4
Interlocking Brick Pavers	South Portion of the Site	335 m ²	1991	30-50		Replacement	95,000	2026	1	30
Interlocking Brick Pavers	South Portion of the Site	Varies	Varies	30-50	-	Localized Repairs	Annual Capital Maintenance Budget	2021	1	-
Concrete Curbs	West Portion of the Site	65 m	1991	30-40		Replacement	10,000	2034	1	30
Concrete Curbs	South Portion of the Site	145 m	1991	30-40		Replacement	20,000	2026	1	30
Concrete Curbs	Various Locations	Varies	Varies	30-40	-	Localize Repairs	Annual Capital Maintenance Budget	2021	1	-



General view of the asphalt paved driveway and parking areas observed on the west portion of the site.



General view of a partial replacement of the asphalt pavement observed on the west portion of the site (replaced in 2019).



Cracking in the asphalt pavement observed on the west portion of the site.



General view of the asphalt paved parking area on the ground level (covered parking area).



Deterioration in the asphalt pavement observed on the ground level.



General view of interlocking stone pavers observed on the south portion of the site.



Deterioration in the pavers observed on the south portion of the site.



Cracking and deterioration in the pavers observed on the south portion of the site.



Cracking and deterioration in the concrete curb observed on the southwest portion of the site.







Deterioration in the concrete curb observed on the south portion of the site.

2.2 Walkways

Description

The walkways consist of cast-in-place concrete and interlocking stone pavers, which serve the main entrance and are located on the east and southeast portions of the site.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Concrete Walkway	Southeast Portion of the Site	15 m ²	1991	30-40		Replacement	6,000	2021	1	30
Concrete Walkway	Southeast Portion of the Site	Varies	Varies	30-40		Localized Repairs	Annual Capital Maintenance Budget	Varies	Varies	-
Interlocking Stone Paver Walkway	East and Southeast Portions of the Site	325 m ²	1991	30-50		Resetting	30,000	2021	1	30
Interlocking Stone Paver Walkway	East and Southeast Portions of the Site	Varies	Varies	30-50		Localized Repairs	Annual Capital Maintenance Budget	Varies	Varies	-



General view of the concrete walkway observed on the southeast portion of the site.



Cracking in the concrete walkway observed on the southeast portion of the site.



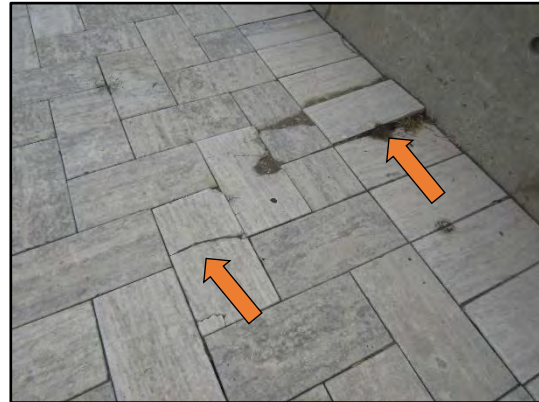
General view of interlocking stone pavers observed on the east portion of the site.



Settled and uneven stone pavers observed on the south portion of the site, which may pose a potential tripping hazard.



Settled and uneven stone pavers observed adjacent to the main entrance of the building, which may pose a potential tripping hazard.



Lifted and cracking in the stone pavers observed on the southeast portion of the site.

2.3 Retaining Walls

Description

The retaining walls are constructed with cast-in-place concrete walls, which are located on the east portion of the site.



KELLER TIPS

- Inspect the retaining walls regularly for cracking, movement, and settlement. Any signs of cracking, movement and settlement require immediate repairs to maintain wall integrity.
- Remove vegetation growth (i.e., weeds) in retaining walls. It can penetrate through cracks and open spaces, causing the wall to shift and can create larger adjustment issues over time.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Concrete Retaining Walls	North and East Portions of the Site	Varies	1991	30-40		Localized Repairs	Annual Capital Maintenance Budget	Varies	Varies	-



Cast-in-place concrete retaining wall observed on the east portion of the site.




Minor cracking in the concrete retaining wall observed on the east portion of the site.

2.4 Soft Landscaping

Description

The landscaped grounds, grass areas, shrubs, planters, and trees are located on the north and west perimeters and east and south portions of the site.


Site grading around the building provides positive drainage away from foundation walls and towards catchment areas.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Landscaped Grounds, Grass Areas, Shrubs, Planters, and Trees	Various Locations	Varies	Varies	Varies		Localized Repairs	Annual Capital Maintenance Budget	Varies	Varies	-

2.5 Bollards

Description

The bollards consist of steel posts filled with concrete, which are designed to protect the building and pedestrians.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Bollards	Various Locations	Varies	Varies	15-20		Localized Repairs	Annual Capital Maintenance Budget	Varies	Varies	-





General view of the steel bollards filled with concrete. Note: Areas of peeling/flaking paint on the steel bollards were observed on the west elevation of the building.

3.0 Building Structure

3.1 Substructure

Description

The substructure of the building is constructed with cast-in-place concrete slabs-on-grade on the main stairwell and utility rooms on the ground level and cast-in-place concrete foundation walls. There is no basement level in the building.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Concrete Slabs-On-Grade	Various Locations	Varies	1991	50+		-	-	Beyond 30 Years	1	50
Foundation Walls	Various Locations	Varies	1991	50+		-	-	Beyond 30 Years	1	50

3.2 Superstructure

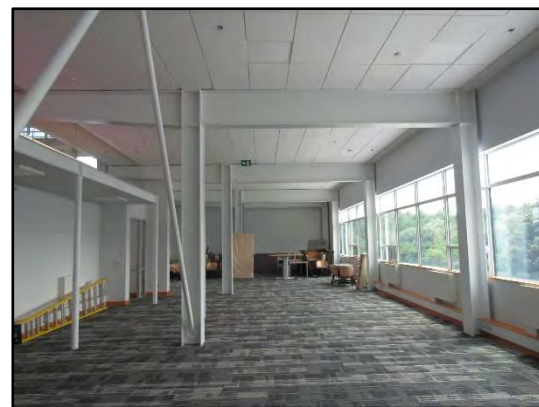
Description

The superstructure of the building is constructed with steel frame support structures (i.e., consisting of columns, beams, trusses, cross-bracings, and open web steel joists) and concrete columns supporting composite floor slabs (i.e., profiled steel deck overlain with concrete) and fluted steel roof decks.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Steel Frame Structure	Various Locations	Varies	1991	50+		-	-	Beyond 30 Years	1	50
Concrete Columns	Ground Level	Varies	1991	50+		-	-	Beyond 30 Years	1	50



General view of the steel columns (covered with fibre cement panels).



General view of the steel frame support structures (i.e., columns, beams, and cross-bracings).



General view of steel columns and trusses on the main roof area.



General view of a steel column supporting a composite floor slab (profiled steel deck overlain with concrete).

4.0 Building Envelope

4.1 Aluminum Panel Systems

Description

The exterior walls have been cladded with a thick gauge custom fit aluminum panel system.

This wall system is constructed of individual weather resistant overlapping panels that are fastened to the existing steel frame support structure.

General Notes

Based on information provided by the Client, installation of new smart vapour barrier and replacement of the caulking on the 3rd floor panels were completed in 2019 at the cost of \$70,000.



Recommended Inspection:

- Aluminum panel condition assessment including destructive testing.



KELLER TIPS

- Exterior painting serves an important function in preserving the aluminum panels and enhancing the appearance of the property.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Aluminum Wall Panels Caulking	All Elevations	Varies	1991	30-40		Replacement	100,000	2031	1	35
Aluminum Wall Panels	All Elevations	Varies	Varies	30-40		Localized Repair Allowance	30,000	2041	1	5



General view of the insulated vertical aluminum panels.



General view of the insulated vertical aluminum panels.



Detached aluminum panel observed on the west elevation of the building.



Discolouration and staining on the aluminum panel observed on the south elevation of the building.

4.2 Exterior Insulation and Finish System (EIFS)



Description

Exterior insulation and finish systems, more commonly known as EIFS, were installed on the ground level, 2nd level and at the soffits of the building.

These walls are constructed with rigid insulation panels of varying thickness that has been covered with reinforcing mesh, a cementitious base coat, and an acrylic finishing coat. The insulation panels are either mechanically fastened or adhered with an adhesive to a back-up wall.

Recommended Inspection:

- EIFS Survey.



KELLER TIPS

- Staining of the EIFS is commonly caused by poor flashings around windows or other penetrations. The flashings at these areas usually can be improved and the panel can be recoated to improve the appearance.
- While the EIFS itself can last over 50 years, overtime, the finish coat will begin to fade in colour. Recoating of the EIFS with a vapour permeable product not only will freshen the look of your building but will also help prevent cracking within the finish coat should be performed anytime the exterior walls are exposed from the interior side.

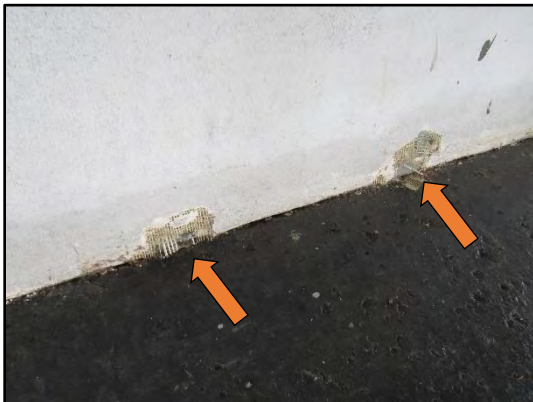
Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
EIFS: Walls	All Elevations	640 m ²	2019	25-30		Recoating	70,000	2047	1	30
EIFS: Soffit	Ground Level: Covered Parking Area	965 m ²	2019	25-30		Recoating	100,000	2047	1	30
EIFS: Soffit	2nd Level: North and South Elevations	125 m ²	2019	25-30		Recoating	15,000	2047	1	30



General view of the EIFS on the ground level.



Unfinished EIFS observed at the main entrance on the ground level (scheduled to be refinished subsequent to the site visit).



Localized damaged EIFS observed on the ground level.



Flaking/peeling coating on the EIFS observed on the soffit on the south elevation of the building.

4.3 Fibre Cement Panels

Description

The columns have been cladded with fibre cement composite panels, which are located in the covered parking area on the ground level.



Recommended Inspection:

- Inspection of the mechanical fasteners for corrosion.



KELLER TIPS

- Repair and replace the impact damaged fibre cement panels to preserve and enhance the appearance of the property.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Fibre Cement Panels on Columns	Ground Level	15	1991	25-30		Replacement	45,000	2021	1	25



General view of the columns which are cladded with fibre cement panels. Note: Severely damaged fibre cement panels were observed on the southeast portion of the building.



Typical impact damaged fibre cement panels observed on the ground level.

4.4 Curtain Wall System



Description

Curtain wall systems are located on all elevations of the building.

The curtain wall systems are constructed with independent frames that carry no structural loads. The frames are infilled with a mixture of fixed and operable insulated glass units (IGUs), non-vision (spandrel) panels and pronounced aluminum frames.

Based on review of select dates stamped on the window spacers, the IGUs were manufactured in 1990 (~31 years old).

Recommended Inspection:

- Curtain wall survey.



KELLER TIPS

- Complete a curtain wall survey prior to refurbishing the curtain wall system to determine the condition.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Curtain Wall Systems Curved Wall	East Elevation	90 m ²	1991	40-50		Curtain Wall Refurbish	123,000 ¹	2036	1	45
Curtain Wall Systems (Excluding the Curved Wall)	East and South Elevations	320 m ²	2008	40-50		Curtain Wall Refurbish	437,500	Beyond 30 Years	1	45
Curtain Wall Systems	All Elevations	Varies	Varies	40-50		Localized Glass Replacement Allowance	25,000	2026	1	5

¹ A curtain wall refurbish allowance of \$123,000 has been made in place of the localized glass replacement allowance in fiscal year 2036 and every 45 years thereafter. Refurbishing of the curtain wall systems includes a full glazing replacement and replacement of the pressure caps.



General view of the curtain wall system on the east elevation of the building.



General view of the curtain wall system on the south elevation of the building.



General view of the original curved curtain wall system on the east elevation of the building.



General view of the curtain wall system on the south elevation of the building.

4.5 Fenestration System

Description

The window systems consist of fixed and operable IGUs set into a strip configuration as well as curtain wall systems, which are located on all elevations of the building.

Based on information provided by the Client, the IGUs on the 2nd and 3rd floors were replaced with smart transition windows (by View) in 2019, as such are 2 years old. The smart windows transition seamlessly between four tint states, which anticipates the sun's movement and continuously adjusts tint levels based on glare, heat, and daylight.

For Curtain Wall Systems refer to Section 4.4 for repairs, replacement, and recommendations.

The skylight is located above the atrium lounge on the central portion of the upper level roof area of the building.

The main entrance of the building consists of aluminum swing doors with metal frames. The doors providing access to the garbage room and utility rooms consist of metal swing doors with metal frames. The doors at the main stairwell consist of metal swing doors complete with single-glazed (SG) inserts with metal frames. The doors at the emergency exits consist of metal swing doors with metal frames. The doors in the interior office space consist of horizontal sliding and swing SG doors with aluminum frames, metal swing doors with metal frames, and wood swing doors with metal frames. The doors providing access to the roof terrace consist of swing SG doors with aluminum frames. The door at the garbage room consists of a steel roll door located on the west elevation of the building.

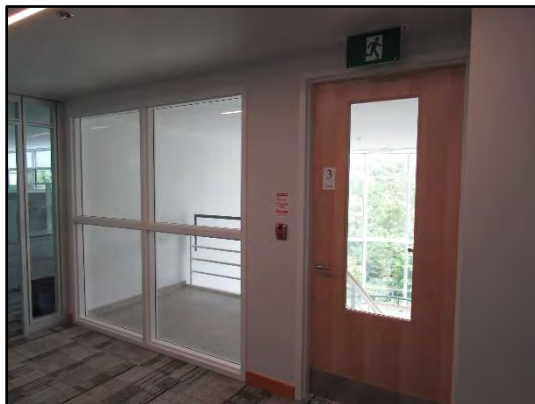
Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
IGUs Clerestory Windows	All Elevations	115 m ²	2008	30-40		Replacement	147,000	2048	1	35
Skylight	Upper Level Roof Area	1	1991	15-20		Replacement	2,000	2021	1	15
Garbage Steel Roll-up Door	West Elevation	1	1991	30-40		Replacement	5,000	2026	1	30
Exterior Doors	Various Elevations	Varies	Varies	Varies		Localized Repairs	Annual Capital Maintenance Budget	Varies	Varies	-



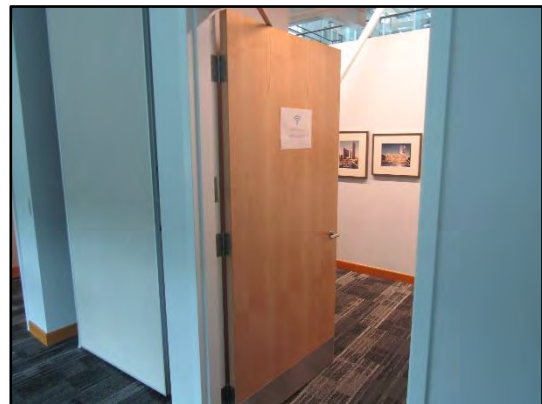
General view of the aluminum doors with metal frames at the main entrance.



General view of a horizontal SG door with aluminum frame in the interior office space.



General view of a solid core wood door with a SG insert with metal frame at the main stairwell.



General view of a wood door with metal frame at the boardroom.



Corrosion on the steel roll-up door observed on the west elevation of the building.



General view of the original skylight on the upper level roof area of the building.

4.6 Roofing System



Description

The main, upper, and lower level roof systems consist of a protected membrane roof assembly with modified bitumen roof membranes. Based on the 2018 Thermal Evaluation of the Protected Membrane Roof Assembly Report, the roof assembly comprised of the following components:

Main and Lower Level Roofs:

- Precast concrete pavers bonded to XPS (Extruded Polystyrene) insulation
- XPS (Extruded Polystyrene) insulation
- Modified bitumen roofing membrane cap sheet
- Mineral fibre insulation
- Cement board (mechanical fastened)
- Fluted metal roof deck

Upper Level Roof:

- Precast concrete pavers bonded to XPS (Extruded Polystyrene) insulation
- XPS (Extruded Polystyrene) insulation
- Modified bitumen roofing membrane cap sheet
- 3-ply hot mop asphalt
- Mineral fibre insulation
- Cement board (mechanical fastened)
- Fluted metal roof deck

Drainage of the roof systems is provided by internal roof drains which likely drain to the municipal sewer system.

Penetrations through the roof systems consist of internal roof drains, roof anchors, goose-neck vents, and steel columns.

It should be noted that due to the concrete pavers and solar panels, a thorough visual assessment of the roof systems was not possible at the time of the site visit.

Recommended Inspection:

- Roof cut tests.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Conventional MBM	Main Roof Area	675 m ²	2018	20-25		Replacement	218,000	2038	1	20
Conventional MBM	Upper Level Roof Area	315 m ²	2018	20-25		Replacement	102,000	2038	1	20
Conventional MBM	Lower Level Roof Areas	115 m ²	2018	20-25		Replacement	37,000	2038	1	20
Conventional MBM	Terrace Roof Area	85 m ²	2018	20-25		Replacement	28,000	2038	1	20
Conventional MBM	Various Locations	Allowance	Varies	20-25		Localized Repair Allowance	5,000	2023	1	5



General view of the main roof area.



General view of the upper level roof area.



General view of the lower level roof area.



General view of the terrace roof area.



Damaged precast concrete pavers and insulation observed on the upper level roof area.



Vegetation growth observed at the roof drain location observed on the main roof area.

4.7 Sealants

Description

Exterior sealants have been installed at the joints in the cladding, flashings and around the perimeters of the windows and doors.



Recommended Inspection:

- Sealant inspection.



KELLER TIPS

- While it may appear easier to apply new sealants over the old, cracked sealants, new sealants will not properly bond to the old sealants, and this can result in failure of the sealant within the first couple years. When replacing sealants, the existing sealant should be fully removed, the joint fully cleaned and only then should new sealant be installed.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Sealants	All Elevations	Varies	2019	10-15		Replacement	40,000	2029	1	10



General view of the exterior wall and window perimeter sealants.




Cracking in the exterior wall joint sealant observed on the east elevation of the building.

5.0 Interior Finishes

5.1 Interior Finishes

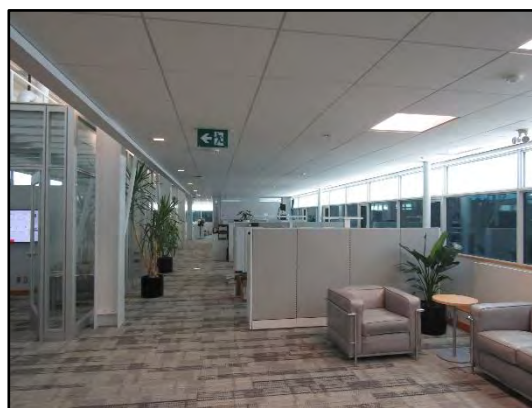
Description

Interior finishes protect the drywalls and structural components of the building. They also enhance the overall aesthetic and create harmonious living spaces.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Interior Finishes	Various Locations	Allowance	2019	15-20		Localized Repair Allowance	100,000	2026	1	15



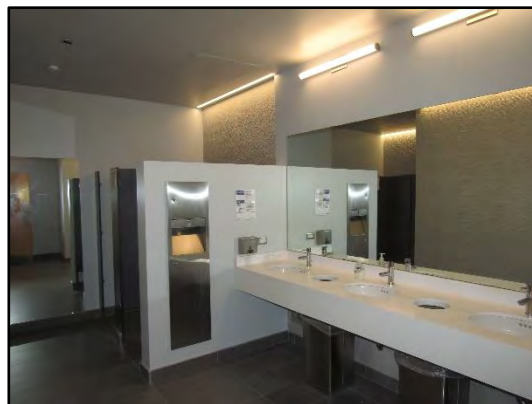
General view of the main lobby and stairwell.



General view of a typical office space.



General view of the atrium café.



General view of a typical washroom.



General view of the kitchen.



General view of the main electrical room.

6.0 Mechanical Systems

6.1 Heating & Cooling Plants

Description

Heating and cooling to the building is provided by a combination geothermal and hydronic solar loop system, water-to-water heat pumps to provide heated and chilled water to fan coils in the building's perimeter.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Water-to-Water Heat Pumps (10-Ton)	Mechanical Room	4	2018	15-20		Replacement	75,000	2033	1	15
Hydronic Solar Heaters	Central Roof Area	24	2018	25-30		Replacement	36,000	2043	1	25
Geothermal Loop	West Portion of the Site	Allowance	2018	50+		Replacement	200,000	Beyond Study	1	50



ClimateMaster water-to-water heat pumps.



Hydronic solar thermal panels.

6.2 Hydronic Specialties

Description

Heating circulating pumps provide circulation between the boiler and the main heating loop.

The expansion tanks handle the expansion and contraction for the liquid in the closed loop system.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Geothermal Loop Pumps 104USgpm	Mechanical Room P-1.1 & 1.2	2	2018	25-30		Replacement	18,000	2043	1	25
Heating Water Circulation Pump 80USgpm	Mechanical Room P2.1 & 2.2	2	2018	25-30		Replacement	16,000	2043	1	25
Chilled Water Loop Pumps 104USgpm	Mechanical Room P-3.1 & 3.2	2	2018	25-30		Replacement	18,000	2043	1	25
Solar Collector Heating Pump 18USgpm	Mechanical Room P-4.1	1	2018	15-20		Replacement	3,000	2033	1	15
Expansion Tank w. Serviceable Bladder	Mechanical Room	2	2018	40-45		Replacement	23,000	Beyond Study	1	40
Expansion Tank Bladder	Mechanical Room	2	2018	10-15		Bladder Replacement	12,000	2028	1	10
Plate & Frame Heat Exchangers	Mechanical Room	2	2018	20-25		Replacement	20,000	2038	1	20
Solar Heat Injection Circulation Pump	Mechanical Room P-2.3	1	2018	10-15		Replacement	2,000	2028	1	10
Glycol Feeder	Mechanical Room	2	2018	30-35		Replacement	8,000	2048	1	30
Expansion Tank Diaphragm	Mechanical Room	1	2018	10-15		Replacement	6,000	2028	1	10



Armstrong hydronic loop pumps.



Bell & Gossett expansion tanks.



Plate and frame heat exchangers.

6.3 Distribution Equipment

Description

The hydronic piping and risers distribute water throughout the building.



KELLER TIPS


- Life expectancy of hydronic piping and rising might be reduced by 10-20 years with poor maintenance or water treatment. Therefore, we recommend that proper maintenance and water treatment be performed regularly.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Hydronic Piping & Risers	Various Locations	Allowance	2018	50 - 70		Major Repairs	250,000	Beyond Study	2	60

6.4 Terminal Equipment

Description

The terminal equipment consists of fan coils. Fan coils provide heating and air conditioning to the building.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Fan Coil Units (Floor & Wall Mounted)	Building Perimeter	78	2018	30-35		Replacement	250,000	2048	1	30



Wall mounted fan coil.





Floor mounted fan coils.

6.5 Self-Contained Equipment

Description

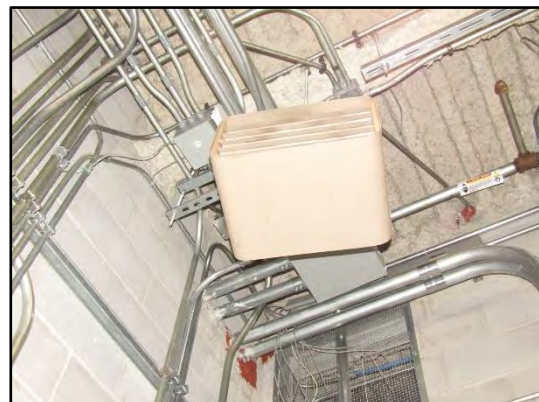
A Mitsubishi direct expansion air-conditioner unit provides cooling in the computer server room.

Electric suspended unit heaters and baseboard heaters provide heating in the utility rooms.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Air Conditioner Unit - Ductless Split (1.5-Ton)	Server Room / Mechanical Room	1	2019	15-20		Replacement	4,000	2034	1	15
Electric Unit Heater	Electrical Room	1	1991	25-30		Replacement	3,000	2022	1	25



Mitsubishi air conditioning unit.




Electric suspended unit heater.

6.6 Miscellaneous Mechanical Equipment

Description

The building automation system provides control and interaction with all the HVAC components in the building.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Building Automation Systems	Various Locations	Allowance	2018	20-25		Repairs or Upgrades Allowance	10,000	2028	1	5

7.0 Ventilation Systems

7.1 Building Ventilation Systems

Description

The Daikin hydronic air handling unit provides fresh air, heat recovery, heating, and cooling to the building.

The Greenheck exhaust fans provide ventilation and temperature control.

The Greenheck smoke fans seldom run and provide smoke removal when a fire alarm is triggered.

The Big Ass ceiling fan circulates air in the atrium café.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Hydronic Air Handling Unit	Mechanical Room	1	2018	30-35		Replacement	160,000	2048	1	30
VAV Boxes	Various Locations	18	2018	15-20		Replacement	75,000	2033	1	15
Big Ass Ceiling Fan	Lunchroom	1	2018	25-30		Replacement	13,000	2043	1	25
Stairwell Exhaust Fan	Main Roof Area	1	2018	25-30		Replacement	5,000	2043	1	25
Smoke Exhaust Fans	Main Roof Area	2	2018	40-45		Replacement	15,000	Beyond Study	1	40



Daikin air handling unit.



Greenheck main stairwell exhaust fan.



Big Ass ceiling fan.

8.0 Plumbing Systems

8.1 Plumbing Systems



Description

Plumbing systems consist of domestic hot and cold water risers, and sanitary and storm water pipes and stacks.

The main water incoming line appears to be equipped with a Watts 2-inch backflow preventer. Based on review of the inspection tag, the backflow preventer was last inspected in November 2019, which is outdated. As such, Keller Engineering recommends inspection of the backflow preventer by a certified plumbing contractor.

Recommended Inspection:

- Ultrasonic thickness testing of the domestic hot and cold water pipes should occur on periodic intervals to better assess their condition and remaining service life.
- Camera inspection and flushing of the sanitary pipes and stacks should be performed every 10 years.
- Testing of the backflow preventers should be performed year by a qualified technician.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Domestic Cold and Hot Water Distribution Pipes and Risers	Various Locations	Allowance	1991	60-80		Replacement	40,000	Beyond 30 Years	1	70
Sanitary and Storm Pipes and Stacks	Various Locations	Allowance	1991	60-80		Replacement	40,000	Beyond 30 Years	1	70
Backflow Preventer	Sprinkler Room	Allowance	2016	15-20		Replacement	5,000	2031	1	15



Main water incoming line and water meter.






Watts 2-inch backflow preventer installed onto the main water incoming line.

8.2 Hot Water

Description

A heat pump domestic hot water heater with remote condenser is used as a primary system for the domestic hot water.

The indirect hot water heater uses solar heat to provide domestic hot water and storage for the building.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Indirect Hot Water Tank Heater Stainless Steel	Mechanical Room	1	2018	25-30		Replacement	8,000	2043	1	25
Domestic Hot Water Heater Heat Pump	Mechanical Room / Roof Area	1	2018	15-20		Replacement	8,000	2033	1	15
Domestic Water Expansion Tank	Sprinkler Room	1	2016	10-15		Replacement	Annual Capital Maintenance Budget	2026	1	10



Indirect hot water tank heater and recirculation pump.



Potable water expansion tank.

9.0 Electrical System

9.1 Main Electrical Service

Description

The main hydro equipment consists of a concrete pad mounted municipal transformer located on the northeast portion of the site. The primary transformer is owned and maintained by Toronto Hydro.

The main fused disconnect switchgear is located in the main electrical room on the ground level, which protects and isolates the main electrical feed into the building. The main electrical service is rated at 1,200 Ampere, 240 Volt, 3 Phase, 4 Wire service, complete with a Federal Pioneer main disconnect switch.



KELLER TIPS

- Toronto Hydro requires that 3m clearance on all sides of the concrete pad mounted transformer for servicing the equipment and to provide equipment cooling. Trees and shrubs surrounding the concrete pad mounted transformer must be removed.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Main Disconnect Switchgear (1200A, 240V)	Electrical Room	1	1991	40-45		Replacement	152,000	2031	1	40



Main concrete pad-mounted municipal transformer.



Main disconnect switchgear.

9.2 Electrical Distribution Equipment



Description

The distribution breaker panels divide electrical power feed into subsidiary circuits.

Fused disconnect switches provide electrical power feed and overload protection to individual pieces of equipment.

Dry core transformers reduce the voltage of the electrical feed.

Recommended Inspection:

- Although costs are not included in this study, as they do not constitute a major repair or replacement, we recommend periodic maintenance and infrared thermography be performed on the electrical system every 5 years, using funds from the annual capital maintenance budget.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Distribution Breaker Panels	Various Locations	11	1991	40-50		Replacement	84,000	2031	2	40
Distribution Breaker Panels	Server Room	1	2010	40-50		Replacement	5,000	2050	1	40
Solar Power Distribution Breaker Panel	Second Floor Electrical Room	1	2019	40-50		Replacement	20,000	Beyond Study	1	40
Fused Disconnect Switches	Elevator Machine Room	1	1991	40-50		Replacement	5,000	2031	1	40
Solar Power Fused Disconnect Switches	Various Locations	3	2019	40-50		Replacement	20,000	Beyond Study	1	40
Solar Power Dry Core Transformer	Second Floor Electrical Room	1	2019	35-40		Replacement	20,000	Beyond Study	1	35



Distribution breaker panels.






Various disconnect switches.

9.3 Solar Power

Description

A solar photovoltaic energy system consisting of an array of solar photovoltaic panels are located on the on the main, upper, and lower level roof areas, which produces electrical power to the building. Excess power is sold back to the Toronto Hydro grid.

Based on information provided by the Site Representative, the solar photovoltaic energy system was installed in approximately 2019 (~ 2 years ago).

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Solar Modules	Roof Areas	208	2019	25-30		Replacement	100,000	2044	1	25
Inverters	Main Roof	4	2019	20-25		Replacement	20,000	2039	1	20
Optimizers	Main Roof	104	2019	25-30		Replacement	15,000	2044	1	25



Array of solar photovoltaic panels.



Fronius solar power inverters.



Solar photovoltaic energy system disconnect switch.



Solar photovoltaic energy system rapid shutdown disconnect switch.

10.0 Lighting System

10.1 Lighting System






Description

The lighting systems are LED throughout and are managed with a Lutron system.

Interior LED light fixtures provide lighting to the interior spaces of the building.

Exterior LED light fixtures, wall mounted, light bollards, and poles, provide lighting throughout the exterior common areas of the building.

The emergency lighting, battery packs, & exit signage located throughout the building provide emergency power for emergency lights and exists signs.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Interior LED Light Fixtures	Corridors	Allowance	2018	Varies		Isolated Replacement Allowance	3,000	2023	1	5
Wall Mounted LED Fixtures	Garage	19	2018	25-30		Replacement	8,000	2043	1	25
LED Light Bollards	Exterior	6	2018	20-25		Replacement	4,000	2038	1	20
LED Light Standards and Poles	Exterior	3	2018	25-30		Replacement	24,000	2043	1	25
Emergency Lighting, Battery Packs, & Exit Signage	Various Locations	Allowance	2018	Varies		Isolated Replacement Allowance	2,000	2028	1	10



Light bollard.



Light standard and pole.

11.0 Fire Protection System

11.1 Fire Protection System

Description

The fire protection system consists of a wet sprinkler system. Based on the inspection tags, the sprinkler system was last inspected in April 2016, which is outdated. As such, Keller Engineering recommends inspection of the sprinkler system by a certified fire protection contractor.

Missing sprinkler head installation tool and sprinkler heads were observed in the sprinkler room. As such, install new sprinkler head installation tool and sprinkler heads in the storage cabinet.

An Emerson jockey pump maintains the sprinkler system water pressure.

There is no backflow preventer installed for the sprinkler main riser.

Additional fire protection is provided by dry chemical fire extinguishers located at various locations and at the exits. Based on the inspection tags, the fire extinguishers were last inspected in February 2020, which is outdated. As such, Keller Engineering recommends inspection of the fire extinguishers by a certified fire protection contractor.



Recommended Inspection:

- Keller Engineering recommends annual inspection of the fire protection systems by a certified fire protection contractor and should be continued to ensure that the systems always remain in active working condition.



KELLER TIPS

- Fire suppression system should be inspected and tested annually.
- Backflow preventer devices are required to be installed at the incoming fire water suppression system.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Sprinkler Pipes	Various Locations	Allowance	1991	60-80		Replacement	150,000	Beyond Study	1	80
Sprinkler Heads	Various Locations	Allowance	1991	50		Replacement	90,000	2041	1	50
Jockey Pump	Sprinkler Room	Allowance	1991	30-35		Replacement	2,000	2022	1	30
Backflow Preventer	Sprinkler Room	1	-	15-20	-	Installation	10,000	2022	1	15
Backflow Preventer	Sprinkler Room	1	-	15-20	-	Repair	5,000	2037	1	15
Fire Extinguishers	Various Locations	Allowance	2018	15-20		Replacement	2,000	2033	1	15



Sprinkler main riser and shut-valve.



Jockey pump.



A typical dry chemical fire extinguisher.



Missing installation tool and sprinkler heads observed in the sprinkler room.

11.2 Fire Alarm System

Description

The fire alarm system consists of an EST fire alarm main control panel and a remote annunciator panel, which provide monitoring of the fire alarm sensors.

The smoke detectors and heat sensors provide monitoring for the fire alarm system.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Fire Alarm Panels	Main Electrical Room	1	2019	25-30		Replacement	25,000	2044	1	25
Fire Alarm Partial Rewiring	Various Locations	Allowance	Est. 1991	50-55		Replacement	40,000	2044	1	50
Fire Alarm Sensors	Various Locations	Allowance	Varies	5-10		Isolated Replacement	2,000	2024	1	5



EST fire alarm main control panel.



EST remote annunciator panel.




Typical manual pull station.

12.0 Security System

12.1 Security System

Description

Key fob systems consist of a main controller and fob readers.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Key Fob System	Various Locations	Allowance	2018	15-20		Replacement	10,000	2033	1	15

13.0 Elevator System

13.1 Passenger Elevators

Description

The Otis hydraulic passenger elevator provides access to the Ground to 3rd level of the building. The hydraulic elevator has a maximum capacity of 907 kg or 12 persons.

The elevator system is maintained on a full maintenance contract by "Otis", an independent elevator contractor and was last inspected in April 2021.

Based on review of the Technical Standards and Safety Authority (TSSA) licence certificates for the elevator system, the licence certificate will expire on April 2, 2022.



Recommended Inspection:

- We recommend that a third party specializing in elevator repair and maintenance be retained to provide a study and report to complete a detailed inspection of the equipment's condition, accurately gauge potential modernization or upgrades and better estimate its remaining service life.

Element Type	Location	Quantity	Year Installed	Service Life (Yrs)	Condition	Anticipated Work	Cost (\$)	First Year	Phases (Yrs)	Cycle (Yrs)
Life Cycle Analysis					Repair / Replacement Forecasting					
Hydraulic Elevator Machine, Control Panel & Cab Interiors	Elevator Machine Room & Elevator Cab	1	1991	25-30		Modernization	129,000	2022	1	25
Anticipated Code Changes	-	-	-	-	-	Contingency Allowance	1,500	2027	1	5
TSSA License Certificate	-	-	-	-	-	Contingency Allowance	2,000	2022	1	5



General view of the main elevator lobby on the ground level of the building.



General view of the hydraulic reservoir and main elevator control panel observed in the elevation machine room.



General view of the control panel in the elevator cab.



General view of the TSSA license certificate observed in the elevator cab.

**APPENDIX A:
SPREADSHEET FOR
MAJOR REPAIR
AND
REPLACEMENT
COSTS**

111 Moatfield Drive, Toronto, ON: Spreadsheet For Major Repair & Replacement Costs, Fiscal Years 2021 to 2050

AGE OF COMPLEX	30 Years	31 Years	32 Years	33 Years	34 Years	35 Years	36 Years	37 Years	38 Years	39 Years	40 Years	41 Years	42 Years	43 Years	44 Years
REPAIR/REPLACEMENT ITEMS	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
1.0 SITE SERVICES & INFRASTRUCTURE															
1.1 Water and Wastewater Infrastructure															
2.0 SITE FEATURES															
2.1 Pavements, Pavers & Curbs	\$45,000					\$115,000								\$45,000	
2.2 Walkways	\$36,000														
2.3 Retaining Walls															
2.4 Soft Landscaping															
2.5 Bollards															
3.0 BUILDING STRUCTURE															
3.1 Substructure															
3.2 Superstructure															
4.0 BUILDING ENVELOPE															
4.1 Aluminum Panel Systems											\$100,000				
4.2 EIFS															
4.3 Fibre Cement Panels	\$45,000														
4.4 Curtain Wall Systems						\$25,000					\$25,000				
4.5 Fenestration Systems	\$2,000					\$5,000									
4.6 Roofing Systems			\$5,000					\$5,000					\$5,000		
4.7 Sealants									\$40,000						
5.0 INTERIOR FINISHES															
5.1 Interior Finishes														\$100,000	
6.0 MECHANICAL SYSTEMS															
6.1 Heating & Cooling Plants													\$75,000		
6.2 Hydronic Specialties								\$20,000					\$3,000		
6.3 Distribution Equipment															
6.4 Terminal Equipment															
6.5 Self-Contained Equipment		\$3,000												\$4,000	
6.6 Miscellaneous Mechanical Equipment								\$10,000					\$10,000		
7.0 VENTILATION SYSTEMS															
7.1 Building Ventilation Systems													\$75,000		
8.0 Plumbing Systems															
8.1 Plumbing Systems											\$5,000				
8.2 Hot Water													\$8,000		
9.0 ELECTRICAL SYSTEM															
9.1 Main Electrical Service											\$152,000				
9.2 Electrical Distribution Equipment											\$47,000	\$42,000			
9.3 Solar Power															
10.0 LIGHTING SYSTEM															
10.1 Lighting System			\$3,000					\$5,000					\$3,000		
11.0 FIRE PROTECTION SYSTEM															
11.1 Fire Protection System		\$12,000											\$2,000		
11.2 Fire Alarm System				\$2,000					\$2,000					\$2,000	
12.0 SECURITY SYSTEM															
12.1 Security System													\$10,000		
13.0 ELEVATOR SYSTEM															
13.1 Passenger Elevators		\$132,500					\$3,500					\$3,500			
GENERAL															
Contingencies	\$6,400	\$7,375	\$400												
Reserve Fund Study Update	\$8,100			\$4,000			\$8,100			\$4,000			\$8,100		
YEARLY EXPENDITURE TOTALS	\$142,500	\$154,875	\$8,400	\$6,000	\$0	\$145,000	\$11,600	\$40,000	\$42,000	\$4,000	\$329,000	\$45,500	\$199,100	\$151,000	\$0
EXPENDITURES INCL. INFLATION	\$142,500	\$158,747	\$8,825	\$6,461	\$0	\$164,054	\$13,452	\$47,547	\$51,173	\$4,995	\$421,148	\$59,700	\$267,767	\$208,155	\$0
CONTRIBUTIONS FROM FEES	\$274,156	\$154,000	\$157,850	\$161,796	\$165,841	\$169,987	\$174,237	\$178,593	\$183,058	\$187,634	\$192,325	\$197,133	\$202,061	\$207,113	\$212,291
ADDITIONAL CONTRIBUTIONS															
INTEREST CONTRIBUTIONS	\$10,286	\$11,599	\$14,773	\$18,135	\$21,774	\$22,287	\$25,906	\$29,001	\$32,175	\$36,425	\$32,530	\$35,881	\$35,236	\$35,869	\$40,780
REMAINING RESERVE FUND	\$661,677	\$668,529	\$832,326	\$1,005,796	\$1,193,412	\$1,221,632	\$1,408,322	\$1,568,369	\$1,732,428	\$1,951,492	\$1,755,199	\$1,928,514	\$1,898,043	\$1,932,870	\$2,185,941

ESTIMATED RESERVE FUND = \$519,735 November 30, 2020
CURRENT ANNUAL CONTRIBUTIONS = \$274,156 December 1, 2020
FUTURE ANNUAL CONTRIBUTIONS = \$154,000 December 1, 2021

NOTES:

1) Interest contributions for each year are calculated at the midpoint of the fiscal year and assume that all expenditures have occurred and 50% of contributions have been collected. A fixed interest rate of 2.0% is used in the calculation

2) Estimates for expenditures include HST and, where appropriate, engineering fees.

45 Years	46 Years	47 Years	48 Years	49 Years	50 Years	51 Years	52 Years	53 Years	54 Years	55 Years	56 Years	57 Years	58 Years	59 Years		AGE OF COMPLEX
2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	TOTALS	REPAIR/REPLACEMENT ITEMS
					\$20,000										\$20,000	1.0 SITE SERVICES & INFRASTRUCTURE
																1.1 Water and Wastewater Infrastructure
																2.0 SITE FEATURES
\$45,000													\$35,000		\$285,000	2.1 Pavements, Pavers & Curbs
															\$36,000	2.2 Walkways
															\$0	2.3 Retaining Walls
															\$0	2.4 Soft Landscaping
															\$0	2.5 Bollards
																3.0 BUILDING STRUCTURE
															\$0	3.1 Substructure
															\$0	3.2 Superstructure
																4.0 BUILDING ENVELOPE
					\$30,000					\$30,000					\$160,000	4.1 Aluminum Panel Systems
											\$185,000				\$185,000	4.2 EIFS
										\$45,000					\$90,000	4.3 Fibre Cement Panels
\$123,000					\$25,000					\$25,000					\$223,000	4.4 Curtain Wall Systems
\$2,000												\$149,000			\$158,000	4.5 Fenestration Systems
												\$5,000			\$405,000	4.6 Roofing Systems
		\$385,000												\$40,000	\$120,000	4.7 Sealants
			\$40,000													5.0 INTERIOR FINISHES
														\$100,000	\$200,000	5.1 Interior Finishes
																6.0 MECHANICAL SYSTEMS
							\$36,000					\$75,000			\$186,000	6.1 Heating & Cooling Plants
		\$40,000					\$52,000					\$31,000			\$146,000	6.2 Hydronic Specialties
															\$0	6.3 Distribution Equipment
												\$250,000			\$250,000	6.4 Terminal Equipment
											\$3,000		\$4,000		\$14,000	6.5 Self-Contained Equipment
		\$10,000					\$10,000					\$10,000			\$50,000	6.6 Miscellaneous Mechanical Equipment
							\$18,000					\$235,000			\$328,000	7.0 VENTILATION SYSTEMS
																7.1 Building Ventilation Systems
																8.0 Plumbing Systems
										\$5,000					\$10,000	8.1 Plumbing Systems
							\$8,000					\$8,000			\$24,000	8.2 Hot Water
																9.0 ELECTRICAL SYSTEM
															\$152,000	9.1 Main Electrical Service
														\$5,000	\$94,000	9.2 Electrical Distribution Equipment
			\$20,000					\$115,000							\$135,000	9.3 Solar Power
																10.0 LIGHTING SYSTEM
		\$9,000					\$35,000					\$5,000			\$60,000	10.1 Lighting System
																11.0 FIRE PROTECTION SYSTEM
	\$5,000				\$90,000							\$2,000			\$111,000	11.1 Fire Protection System
			\$2,000					\$67,000					\$2,000		\$77,000	11.2 Fire Alarm System
																12.0 SECURITY SYSTEM
												\$10,000			\$20,000	12.1 Security System
																13.0 ELEVATOR SYSTEM
	\$3,500					\$3,500					\$132,500				\$279,000	13.1 Passenger Elevators
																0 GENERAL
															\$14,175	Contingencies
\$4,000			\$8,100			\$4,000			\$8,100			\$4,000			\$60,500	Reserve Fund Study Update
\$174,000	\$8,500	\$444,000	\$70,100	\$0	\$165,000	\$7,500	\$159,000	\$182,000	\$8,100	\$105,000	\$320,500	\$784,000	\$181,000	\$5,000	\$3,892,675	YEARLY EXPENDITURE TOTALS
\$252,004	\$12,618	\$675,599	\$109,332	\$0	\$270,372	\$12,597	\$273,730	\$321,159	\$14,651	\$194,664	\$609,044	\$1,527,075	\$361,366	\$10,232	\$6,198,968	EXPENDITURES INCL. INFLATION
\$217,598	\$223,038	\$228,614	\$234,329	\$240,187	\$246,192	\$252,347	\$258,656	\$265,122	\$271,750	\$278,544	\$285,507	\$292,645	\$299,961	\$307,460	\$6,720,026	CONTRIBUTIONS FROM FEES
															\$0	ADDITIONAL CONTRIBUTIONS
\$40,855	\$45,826	\$37,747	\$40,945	\$46,509	\$46,895	\$52,567	\$53,253	\$53,133	\$59,271	\$62,066	\$56,767	\$33,143	\$32,504	\$39,024	\$1,103,162	INTEREST CONTRIBUTIONS
\$2,192,389	\$2,448,635	\$2,039,397	\$2,205,339	\$2,492,035	\$2,514,751	\$2,807,067	\$2,845,246	\$2,842,342	\$3,158,713	\$3,304,659	\$3,037,890	\$1,836,602	\$1,807,702	\$2,143,955	\$2,143,955	REMAINING RESERVE FUND
REMAINING RESERVE FUND IN 2021 DOLLARS															\$1,047,667	

3) Inflation assumed to be at an average rate of 2.5% over the time frame examined above.

APPENDIX B:
ROONEY, IRVING & ASSOCIATES LTD.
ELEVATOR RESERVE FUND STUDY



Rooney, Irving & Assoc. Ltd.
416-214-3675
amcgregor@rooneyirving.ca

ELEVATOR RESERVE FUND STUDY

111 Moatfield Drive, North York, Ontario

Date of Report
July 2021



1.0 PURPOSE

On July 22, 2021, RiA undertook a study of the elevator equipment located at Ontario Association of Architects, 111 Moatfield Drive, North York, Ontario for Keller Engineering. We conducted the study to determine the condition of the elevator equipment, evaluate the elevator service contractor's quality of maintenance, determine the capital costs likely to be encountered by the Owner, and to itemize any obvious maintenance deficiencies.

The site undertaken was predominantly visual, and system components were not disassembled under the scope of our work.

2.0 SUMMARY, RECOMMENDATIONS AND COSTS

RiA recommends that the deficiencies of Section 5 of this report be referred to the maintenance contractor for their corrective action. We would suggest 60 days as a reasonable time frame to correct the deficiencies.

Almost all the major components of the existing elevator system should be covered under the terms of a full maintenance program. On the assumption that there is such an agreement in place, there should be no major capital expenditures required to replace or repair these components within the expected life of the system. Notable exceptions are vandalism and replacement of obsolete parts. Another potential source of extra costs occurs when the property owner terminates one maintenance contractor's services, or the contractor themselves terminates their contract. In this case, a new contractor may require extras added to the monthly maintenance fee to cover the major components left in poor condition by the outgoing contractor. To avoid this source of extra costs, vigilant ongoing policing of the performance of the maintenance contractor is an effective approach.

Complete modernization – Because it has been over 30 years since its installation, the equipment has surpassed its engineered life expectancy. A modernization is required in the short term; the existing controller, oil tank, valve, motor, and pump require replacement. Also, a modernization typically involves the replacement of all operating buttons and fixtures, as well as replacement of all wiring. The upgrading cost for the existing elevator system includes all feasible associated work required to ensure the elevator system complies with the latest edition of the CSA Safety Code for Elevators. Elevator modernization is predicted to cost \$129,000. This includes the cost of a cab modernization.

Contingency fund for Provincial regulator – Periodically, the Technical Standards and Safety Authority (TSSA) dictates remedial work that must be carried out on various types of elevators. As these rulings become enforced, the Owner is responsible for the cost to ensure that the elevator is in compliance. We recommend that a contingency fund of \$1,500 is established every five (5) years to cover the cost of any future mandatory work for this site.

Emergency battery-operated lowering device – The elevator system is not equipped with an emergency lowering device or emergency power operation. In the event of a power failure in the

building, passengers could become entrapped in the elevator until the power is restored. The estimated cost for a battery-operated emergency lowering system is approximately \$8,000. This cost would be included in the price of a modernization.

3.0 DESCRIPTION OF VERTICAL TRANSPORTATION SYSTEM

The vertical transportation system consists of one inground hydraulic passenger elevator.

3.1 Technical Data

The technical and nameplate data of the elevating equipment is as follows:

Category	Description
Building Designation	1
Installation Number	66813
Class	Passenger
Capacity	2,000 lb
Speed	125 fpm
Floors Served	3
Car Door Opening	36" wide x 84" high Single-speed, side-opening
Door Protection	Multibeam infrared detector
Door Operator	Otis
Power Unit	Otis hydraulic Submerged remote 25 HP, 208 volt, 3 phase
Valve	Maxton UC4M
Electrical Controller	Otis LRV 2000
Drive	Inground with PVC protection
Manufacturer	Otis Elevator
Installation Date	circa 1990
Maintenance Contractor	Otis Elevator

3.2 Existing Conditions

The elevator system was manufactured and installed by Otis Elevator circa 1990.

The elevator hydraulic system uses hydraulic fluid as its means of vertical propulsion. Hydraulic fluid is forced under pressure into the cylinder by action of the electrically driven pump. This causes the piston, situated within the cylinder, to displace upwards. Down-direction travel is achieved through controlled gravity lowering. Under this condition, oil within the cylinder is allowed to return to the oil tank, through the controlled back flow as monitored by an electrically regulated valve unit.

The elevator is of in-ground cylinder design. This type of cylinder is prone to attack by electrical or corrosive chemical elements contained in the soil near the elevator. These mechanisms have led to the failure by leakage of elevator cylinders. The elevator has been equipped with PVC cylinder protection - a modern requirement of the Safety Code. PVC cylinder protection is meant to prevent failure of buried hydraulic cylinders by protecting the cylinder from corrosive elements.

The Otis elevator control system provided would most likely be considered proprietary by any elevator service contractor other than the original equipment manufacturer. This may limit the owner's choice of maintenance contractor and limit their ability to get competitive pricing on full parts and labour maintenance.

The elevator system is not equipped with emergency recall, in-car emergency service operation, or emergency power operation. In the event of a power failure in the building, passengers could become entrapped in the elevator.

The existing car cab finishes consist of raised laminate walls, eggcrate ceiling, and carpeted flooring. The finishes remain in good condition at this time. The cab and fixtures do not meet the following requirements of CSA B44 Code, Appendix E - Elevator Requirements for Persons with Physical Disabilities:

- The car does not chime appropriately – once to indicate the up direction and twice to indicate the down direction.
- The cab does not meet the requirement of 6'8" x 4'3" dimensions with a side-opening door.

3.3 Compliance to A17.1/CSA-B44 Safety Code for Elevators

The elevator system was installed in compliance with the then-existing A17.1/CSA-B44 Safety Code for Elevators. Since the date of installation, there have been revisions to the Code. Listed below are the readily identifiable variances relating to the current Code for newly installed and modernized elevators. The Code is not retroactive, unless mandated by Director's Ruling, therefore compliance with these items is not mandatory. However, they are listed here as optional for improving the safety of the existing elevator system.

Safety Code Items	
1.	Provide 110-volt GFCI receptacles in the elevator machine room.
2.	Provide Code issue data plate at the controller.
3.	Provide temperature and humidity range data plates at the controller.
4.	Provide hoistway access to Code.
5.	Provide communications failure status light at lobby.
6.	Provide 110-volt GFCI receptacle at car top.

4.0 MEASURED PERFORMANCE

The parameters defined below were measured. Those requiring adjustment are highlighted in red and are reflected in the Maintenance Deficiencies section of this report.

Parameter	Required	Elev. 1
Car Speed UP	125 fpm $\pm 10\%$	139
Car Speed DOWN	125 fpm $\pm 15\%$	106
Flight Time UP	≤ 13.8 sec	18.4
Flight Time DOWN	≤ 13.8 sec	19.2
Average Accel UP	0.02 g	0.04
Max Jerk	≤ 15 f/s ³	14
Door Stall Force	≤ 30 lb	25
Levelling Accuracy	1/4"	1/4"

Table Definitions

Car Speed: The normal maximum running speed of the elevator, measured in feet per minute.

Flight Time: The time elapsed for an elevator to serve two consecutive floors, measured from the time the elevator doors begin to close until they are 3/4 open at the next floor.

Average Acceleration: The average acceleration experienced in the car when approaching top speed, measured as gravity - g. The acceleration measurement is compared to a suggested value which is dependent on the type of elevator system - hydraulic, geared, or gearless.

Maximum Jerk: The maximum change in acceleration experienced in the car over the ride including start, acceleration, deceleration and stop. Jerk is measured in feet per second (cubed). The Jerk measurement is compared to a suggested value which is dependent on the type of elevator system - hydraulic, geared, or gearless.

Door Stall Force: The force exerted by the elevator car door, during a door close cycle but after the door has been manually brought to a stop. The force is measured while the door is approximately 1/3 closed. The measured force is compared to the maximum force allowed by the CSA Safety Code for Elevators - 30 lb of force.

Levelling Accuracy: The observed accuracy of floor landing at the time of our review. Note that this accuracy can easily vary, even within a given day.

5.0 MAINTENANCE

The elevator equipment is maintained by Otis Elevator, presumably under the terms of their full parts and labour contract. As most major components of the elevator system are generally covered under the terms of a full maintenance program, no major capital expenditures should be incurred to repair these components. Exceptions to full maintenance coverage detailed in the contract, such as vandalism, misuse, etc., should be noted. We caution that most elevator contractor's maintenance contracts employ an "evergreen" clause. This will result in the Owner being contractually obligated for a subsequent five-year term, should cancellation notice be given less than 90 days in advance of the fifth anniversary of the contract term.

The maintenance contractor is performing "routine" maintenance visits on a quarterly basis. The maintenance contract in place should be reviewed to confirm if monthly or quarterly visits were to be provided. RIA recommends monthly "routine" visits at a minimum be performed to ensure a reliable and safe elevator system as well as to ensure the longevity of the equipment. We note that quarterly visits are the minimum allowed by Code provided that this meets the maintenance frequencies set out by the various manufacturers of the equipment.

5.1 Maintenance Logs

The machine room safety logs are currently up to date with the exception of the issues noted below. These logs are required in the Province of Ontario to document safety work completed on elevator installations and the applicable legislation puts the onus of completion of the logs on the property owner.

The status of the logs are as follows:

Task	Record
Routine Visits	4 of last 4 planned visits logged Contractor's plan is for quarterly visits
Callback and repair log	Log indicates no calls, if accurate
Annual Work (CAT 1)	Last recorded February 1, 2021
Five-year Work (CAT 5)	No record found
Fire Service Testing	Not applicable
Emergency / Auxiliary Power Testing	Not applicable

5.2 Maintenance Deficiencies

Listed below are deficiencies that should be corrected by the maintenance contractor under the terms of a full-service maintenance contract. We recommend 60 days as the timeframe for corrective action. The contractor must attest to the completion of each deficiency by initialing and dating where indicated. If the contractor has any technical questions or concerns regarding any item, they should be directed to contractor@rooneyirving.ca.

Deficiencies	Date Corrected; Initials
1. Properly complete required tasks at 60-month intervals.	
2. Log all supplementary maintenance work.	
3. Log all malfunction calls.	
4. Provide signage on the oil line where it is external to the machine room and hoistway.	
5. Replace system hydraulic fluid or provide record of replacement within the last 36 months.	
6. Clearly mark the working and relief pressure at the power unit.	
7. Clearly label the manual lowering valve.	
8. Clean dusty car top.	
9. Provide smooth and quiet car door operation.	
10. Replace worn hall door gibs.	
11. Permanently fill in the door operator data tag information.	
12. Provide drip pans for car and counterweight rails.	
13. Adjust to decrease flight times in both directions.	

APPENDIX A – IMAGES

IMAGE 1 – Power unit

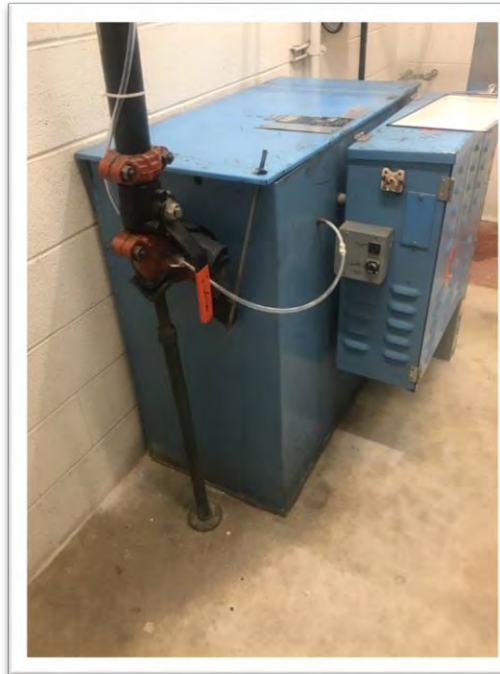


IMAGE 2 – Controller

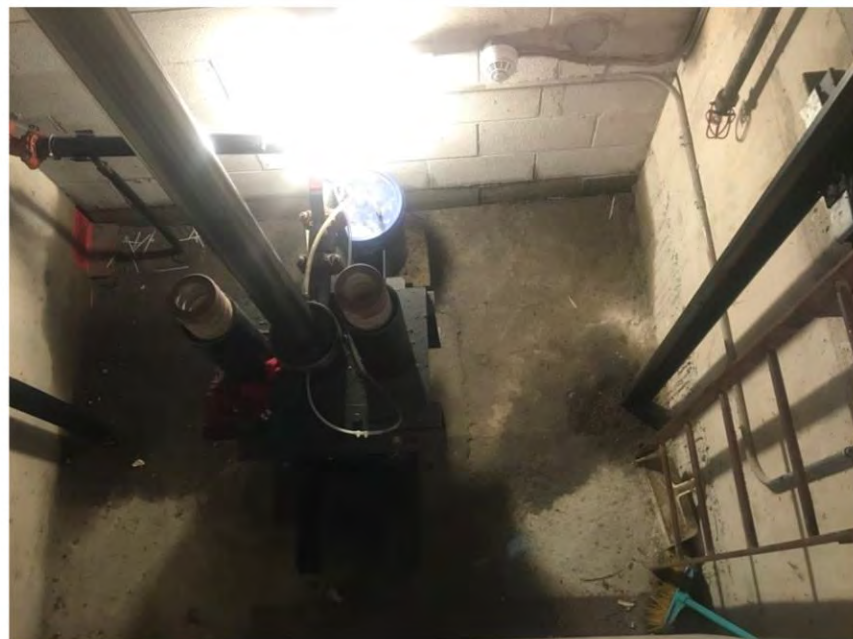


APPENDIX A – IMAGES, CONTINUED

IMAGE 3 – Car top



IMAGE 4 – Pit



APPENDIX B – PROJECTED CAPITAL COST TABLE

Predicted Work \ Year	0-5	6-10	11-15	16-20	21-25	26-30
Future mandatory work required by B44 Safety Code	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500
Complete modernization of existing elevator, including B44 Code upgrades and cab interior	\$129,000					

Notes of Costs:

- HST not included;
- Based on present-day dollars;
- Work which does not fall under the responsibility of the elevator trade, such as air conditioning, not included.

-END OF REPORT-

Memorandum

To: Council

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 4.15

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Christie Mills - Registrar

Date: November 26, 2021

Subject: Council Policy – Naming a Certificate of Practice

Objective: To review and approve an updated Council Policies related to naming a Certificate of Practice

The proposed updated Council Policies are being submitted for review and approval in accordance with the OAA's work to modernise Association literature and documentation to better reflect all OAA members and inclusive language.

There are distinct policies for Architect and Licensed Technologists OAA to align with the distinct Certificate of Practice applications for each designation.

Action: Review and approve proposed Council Policy – Naming a Certificate of Practice

Attachments: 1 - Proposed update to the Council Policy – Naming a Certificate of Practice – Architect
2 - Proposed update to the Council Policy – Naming a Certificate of Practice – Licensed Technologist OAA
3 - Existing Council Policy – Naming a Certificate of Practice



Council Policy

Policy Name **Architect - Naming a Certificate of Practice¹**

Issue Date **March 5, 2009**
March 9, 2006

Revision Dates **May 10, 2006**
June 6, 2010
November 6, 2014
January 18, 2019
December 10, 2021

Certificate of Practice – Sole Proprietor

An Architect who is a Sole Proprietor may name the Practice:

a) A generic name;

or

b) A person's name as long as:

- i) it is the applicant's name;
- ii) it is an Architect's name who has given authorization to use their name and this Architect was formerly part of the Practice;
- iii) it is a former Architect's name who has given authorization to use their name and this individual was formerly part of the Practice;

or

c) A person's initial(s) as long as:

- i) it is the applicant's initial(s);
- ii) it is an Architect's initial(s) who has given authorization to use their initial(s) and this Architect was formerly part of the Practice;
- iii) it is a former Architect's initial(s) who has given authorization to use their initial(s) and this individual was formerly part of the Practice.

Certificate of Practice – Partnership and Corporation

An Architect Partnership or Corporation may name a Practice and include the word "Architect" or any derivation thereof if it is using:

a) A generic name;

or

- b) A person's name, as long as:
 - i) the name belongs to an Architect and that Architect is part of the Practice;
 - ii) it is an Architect's name who has given authorization to use their name and this Architect was formerly part of the Practice;
 - iii) it is a former Architect's name who has given authorization to use their name and this individual was formerly part of the Practice.
- or
- c) Using initial(s) as long as:
 - i) the initial(s) belong to an Architect who is part of the Practice;
 - ii) the initial(s) belong to an Architect who has given authorization to use their initial(s) and this Architect was formerly part of the Practice.
 - iii) it is a former Architect's initial(s) who has given authorization to use their initial(s) and this individual was formerly part of the Practice.

Certificate of Practice – Partnership or Corporation - No Title Designation in Practice Name

A Partnership or Corporation that does not use the word "Architect" or any derivation thereof in its name may name the Practice:

- a) A generic name;
- or
- b) Personal names, as long as:
 - i) one name belongs to an Architect and that Architect is part of the Practice;
 - ii) one name is an Architect's name who has given authorization to use their name and this Architect was formerly part of the Practice
 - iii) one name is a former Architect's name who has given authorization to use their name and this individual was formerly part of the Practice.
- or
- c) Using initial(s) as long as:
 - i) an Architect's initial(s) are included and that Architect is part of the Practice;
 - ii) an Architect's initial(s) are included who has given authorization to use their initial(s) and this Architect was formerly part of the Practice.
 - iii) initial(s) of a former Architect are included who has given authorization to use their initial(s) and this individual was formerly part of the Practice.

Use of Word "Architect" or Derivations

An Architect Certificate of Practice may use the designation "Architect" or "Architects", or any derivation, in their business name if a letter of permission for filing when registering the company name has been asked for and secured from the Office of the Registrar.

Existing Practice Names

A Sole Proprietorship or Partnership or Corporation that is an existing architecture practice from another jurisdiction may use its existing name.



“Doing Business As (DBA)”

Style or Trade Names that are properly registered with the Province of Ontario and the OAA may be used but only in conjunction with the actual name of the Certificate of Practice; for example, Four Ontario Architects dba “pine trees”.

¹ *All business names in Ontario are subject to existing legislation on such matters.*





Council Policy

Policy Name **Licensed Technologist OAA - Naming a Certificate of Practice¹**

Issue Date **December 10, 2021**

Revision Dates

Certificate of Practice - Sole Proprietor

A Licensed Technologist OAA who is a Sole Proprietor may name the Practice:

- a) A generic name;
- or
- b) A person's name as long as:
 - i) it is the applicant's name;
 - ii) it is a Licensed Technologist OAA's name who has given authorization to use their name and this Licensed Technologist OAA was formerly part of the Practice;
 - iii) it is a former Licensed Technologist OAA's name who has given authorization to use their name and this individual was formerly part of the Practice;
- or
- c) A person's initial(s) as long as:
 - i) it is the applicant's initial(s);
 - ii) it is a Licensed Technologist OAA's initial(s) who has given authorization to use their initial(s) and this Licensed Technologist OAA was formerly part of the Practice;
 - iii) it is a former Licensed Technologist OAA's initial(s) who has given authorization to use their initial(s) and this individual was formerly part of the Practice.

Certificate of Practice – Partnership and Corporation

A Licensed Technologist OAA Partnership or Corporation may name a Practice and use "Licensed Technologist OAA" if it is using:

- a) A generic name;
- or
- b) A person's name, as long as:
 - i) the name belongs to a Licensed Technologist OAA and that Licensed Technologist OAA is part of the Practice;

- ii) the name belongs to a Licensed Technologist OAA who has given authorization to use their name and this Licensed Technologist OAA was formerly part of the Practice;
- iii) the name belongs to a former Licensed Technologist OAA who has given authorization to use their name and this individual was formerly part of the Practice.

or

- c) Using initial(s) as long as:
 - i) the initial(s) belong to a Licensed Technologist OAA who is part of the Practice;
 - ii) the initial(s) belong to a Licensed Technologist OAA who has given authorization to use their initial(s) and this Licensed Technologist OAA was formerly part of the Practice.
 - iii) the initial(s) belong to a former Licensed Technologist OAA who has given authorization to use their initial(s) and this individual was formerly part of the Practice.

Partnership or Corporation - No Title Designation in Practice Name

A Partnership or Corporation that does not use "Licensed Technologist OAA" in its name may name the Practice:

- a) A generic name;

or

- b) Personal names, as long as:
 - i) one name belongs to a Licensed Technologist OAA and that Licensed Technologist OAA is part of the Practice;
 - ii) one name is a Licensed Technologist OAA's name who has given authorization to use their name and this Licensed Technologist OAA was formerly part of the Practice
 - iii) one name is a former Licensed Technologist OAA's name who has given authorization to use their name and this individual was formerly part of the Practice.

or

- c) Using initial(s) as long as:
 - i) a Licensed Technologist OAA's initial(s) are included and that Licensed Technologist OAA is part of the Practice;
 - ii) a Licensed Technologist OAA's initial(s) are included who has given authorization to use their initial(s) and this Licensed Technologist OAA was formerly part of the Practice.
 - iii) initial(s) of a former Licensed Technologist OAA are included who has given authorization to use their initial(s) and this individual was formerly part of the Practice.

Use of Word "Architect" or Derivations

A Licensed Technologist OAA Certificate of Practice may use "Architectural" or "Architecture" in their business name if a letter of permission for filing when registering the company name has been asked for and secured from the Office of the Registrar.

Existing Practice Names

A Sole Proprietorship or Partnership or Corporation that is an existing architecture practice from another jurisdiction may use its existing name.



“Doing Business As (DBA)”

Style or Trade Names that are properly registered with the Province of Ontario and the OAA may be used but only in conjunction with the actual name of the Certificate of Practice; for example, Four Ontario Licensed Technologists OAA dba “pine trees”.

¹ *All business names in Ontario are subject to existing legislation on such matters.*





Ontario Association of Architects

Ontario Association of Architects

Policy Name

Issue Date

Revision Dates

Naming a Certificate of Practice

March 5, 2005, March 9, 2006,

May 10, 2006, June 6, 2010,

November 6, 2014

Naming a Certificate of Practice.

- 1) A Sole Proprietor may name his or her Practice:
 - a) A generic name; or
 - b) A person's name as long as it is his or her name; or
 - c) Using a person's initials as long as it is his or her initials.
- 2) A Partnership or Corporation may name a Practice and include the word "Architect" or any derivative thereof if it is using:
 - a) A generic name;
 - b) An OAA member's name or former member's name if
 - i) he or she is part of the Practice; and
 - ii) has given authorization for his or her name to be used;
 - c) An OAA member's initials or former member's initials if
 - i) he or she is part of the Practice; or
 - ii) has given authorization for his or her name to be used;
- 3) A Partnership or Corporation that does not use the word "Architect" or any derivative thereof in its name, may name the Practice:
 - a) A generic name; or
 - b) A person's name, as long as
 - i) one name belongs to an OAA Member; and
 - ii) he or she is part of the Practice; and
 - iii) has given authorization for his or her name to be used; or
 - c) Using initials as long as:
 - i) an OAA member's initial or initials are included;
 - ii) and the OAA member is part of the Practice; and
 - iii) has given authorization for his or her initial or initials to be used.
- 4) A Sole Proprietorship or Partnership or Corporation that is an existing architectural practice from another jurisdiction may use its existing name.
- 5) Style or Trade Names that are properly registered with the Province and the OAA may be used but only with the actual name of the Certificate of Practice; i.e. Four Ontario Architects dba "pine trees".

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 6.1.a

President's Log

Date	Event/Meeting	Location	Attendees	Time
November 4	London & District Construction Association Awards Gala	Virtual meeting	w/Association Members, jury	evening
November 5	CALA Regulators Meeting	Virtual meeting	w/CALA Representatives	1-4pm
November 8	Strategic Planning Consultant Interviews	Virtual meeting	w/S.Vilardi, E.Mintz, K.Doyle, C.Mills, M.Low	10-11am
November 8	Strategic Planning Consultant Interviews	Virtual meeting	w/S.Vilardi, E.Mintz, K.Doyle, C.Mills, B.Quinn	11am-12 noon
November 8	Strategic Planning Consultant Interviews	Virtual meeting	w/S.Vilardi, E.Mintz, K.Doyle, C.Mills, Parsons Dialogue	2:30-3:30pm
November 9	Strategic Planning Consultant Interviews	Virtual meeting	w/S.Vilardi, E.Mintz, K.Doyle, C.Mills, K.McLaughlin	1-2pm
November 10	SHIFT Recording	Virtual meeting	w/E.Missio	3-4pm
November 10	Grand Valley Society Visit	Virtual meeting	w/Society members, B. Birdsell, K.Doyle, E.Missio	6-8pm
November 12	Strategic Planning Consultant Selection Follow-up meeting	Virtual meeting	w/S.Vilardi, E.Mintz, K.Doyle, C.Mills, K.McLaughlin	1-2pm
November 12	OOA K-12 EDUCATIONAL DOC	Virtual meeting	w/A.Mancini, N.Krickhan, E.Savitsky	1-2pm
November 15	BAIDA Stakeholder Engagement	Virtual meeting	w/Abu-Bakare	1-2pm
November 16	SHIFT 2021	Virtual meeting	w/webinar	11-12pm
November 17	TSA- Preslide work	Virtual meeting	w/C.Mykytyshyn, L.Wu	1-3pm
November 17	London/Windsor Society Visit	Virtual meeting		1-3pm
November 18	Toronto Society Visit	Virtual meeting	w/Society members, K.Kurtin, K.Doyle, E.Missio	6-8pm
November 22	OOA K-12 EDUCATIONAL DOC	Virtual meeting	w/T. Gaber, E.Savitsky	1-2pm
November 23	Communications meeting	Virtual meeting	w/E.Missio, C.Mykytyshyn	11-12pm
November 23	Home Builder Magazine Interview	Virtual meeting	w/Home Builder Magazine	10-10:30am
November 24	Executive Committee Meeting	Virtual meeting	w/Executive Committee	11am-12 noon
November 24	HR meeting	Virtual meeting	w/S.Vilardi	12:30-1:30pm
November 24	Strategic Planner Meeting	Virtual meeting	w/K.McLaughlin, S.Vilardi, E.Mintz, K.Doyle, C.Mills	2:30-4:30pm
November 25	Next Edition of OBC Fall Consultation, Small Buildings	Virtual meeting	w/Stakeholders, MMAH	9:30-11:30am
November 25	Conference Working Group	Virtual meeting	w/Working Group members	2-3:30pm
November 25	Niagara Society Visit	Virtual meeting	w/Society Members, B.Birdsell, K.Doyle, E.Missio	6-8pm
November 26	Pro-Demnity Board Meeting	Virtual meeting	w/Board members	8:30am-12:30pm
November 26	Update on OAA Investigation Status	Virtual meeting	w/Board members	4:30-5:30pm
November 29	OAA Strategic Planning Initial meeting	Virtual meeting	w/K.Kurtin, S.Vilardi, K.Doyle, C.Mills, L.McLaughlin	11:00-12:00pm
November 30	Governance Committee	Virtual meeting	w/Committee Members	10:30am-1pm
November 30	International Architectural Roundtable Dinner	Toronto	w/Roundtable members	6-8:30pm
December 1	International Architectural Roundtable	Toronto	w/Attendees, Roundtable Members	8-10am
December 2	PACT Meeting	Virtual meeting	w/Committee members	10am-12 noon
December 6	OAA Strategic Planning Initial meeting	Virtual meeting	w/K.Kurtin, S.Vilardi, K.Doyle, C.Mills, L.McLaughlin	9:00-10:am
December 7	Meeting with Attorney General	Virtual meeting	w/Attorney General, K.Doyle	10-10:30am
December 9	Pre-Council Meeting	Virtual meeting	w/Council	6-8pm
December 10	Council Meeting	Virtual meeting	w/Council	9:30am-4pm

Memorandum

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 6.1.b

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Kristi Doyle, Executive Director

Date: December 1, 2021

Subject: Report from Executive Director

Objective: To provide Council with an update on activities of the Executive Director not covered elsewhere in the Council agenda.

This report outlines specific activities that have occurred and which have not been reported elsewhere in the Council package since the September meeting. This report has also been expanded to include an update on specific items pertaining to the Operational Review as approved and directed by Council.

Internal and Administration

I am happy to advise that we had three new staff start on November 29 as follows:

Leah Sweed is joining the Office of the Registrar as our new Coordinator, Investigations. Leah comes to us with an excellent background in working with another regulatory organization and will be working most directly with the Deputy Registrar dealing with OAA regulatory activities related to professional conduct and breaches of the *Architects Act*.

We also have two new staff joining the Continuing Education service area:

Felix Woehler is our new Webinar Coordinator and comes, most recently, from the employment with the YMCA. Felix is fluent in English, Spanish and German.

Ashley Ward joins us as our new Coordinator, Development coming from Kenilworth Media Inc. Both Ashley and Felix will be working directly with Ellen Savitsky, Manager of Education & Development.

I am also happy to note that **Mei Chen** who had served as the OAA's Office Assistant has moved into the position of Administrator, Finance after responding to the OAA's employment opportunity for the position.

Regular staff meetings continue on Wednesdays at 9:30 a.m. via Zoom. Weekly and Bi-weekly meetings with each of the services areas also continue via Zoom.

At a recent staff meeting, IT Administrator Abhishek Chaudhary provided staff with a short reminder tutorial on how to recognize spam and phishing emails.

On Friday December 3 the OAA social committee will be hosting a holiday social for the staff.

A meeting with the OAA Team Leads was held on November 22. We discussed the draft 'return to office policy'. I received good feedback as well as ideas and additional issues that will need to be considered going forward. On November 30, the proposed plan for 'return to office' was presented to the Governance Committee. After review it was agreed that the plan would be shared with Council for information. **A copy is attached** and I am happy to address any questions that Council may have at the December Council meeting.

In accordance with Council's approval to move ahead with the integration of the OAA's Technology Program into the OAA, work is already underway to integrate the finances and financial processes. OAA will be sending out the annual membership renewals for OAAAS members as part of our usual process, and taking over any expenses that OAAAS currently has early in the new year. By that time, the OAAAS bank account will have been reduced to zero.

Operational Review Updates

Rec: Develop, Implement & Monitor 5-year strategic plan

The selection of a Strategic Planning Consultant has been completed and Kathy McLaughlin & Associates has been engaged. A planning committee consisting of President Speigel, Vice President Vilardi, LGIC Elaine Mintz along with Registrar Mills and myself are working with the consultant to move through the consultation process and data gathering. All Council will be asked to participate in a survey to collect information. Some Council, staff and outside stakeholders will also be interviewed. The Strategic Planning session is scheduled for February 3 and 4 2021 and is intended to be held in person at this time. All Council is asked to block those dates.

Rec: Comprehensive Review of OAA's Technology & Data Management Needs at organizational level - IT REVIEW BUCKET

I have met with OAA's Information Technology Administrator, Abhishek Chaudhary as well as OAA outside IT consultants Velocity to review, in detail the section of the Operational Review report pertaining to our IT systems and database management. We assessed each of the points made and the recommendations. It was noted that some of the issues have been addressed since the operational review consultant had first interviewed staff. Chaudhary will be working with me to develop an RFP for an appropriate consultant to respond to the IT/data management recommendations. That RFP will be issued some time in the first quarter.

I do want to note however, notwithstanding this RFP process the OAA will be transitioning to Office 360 in the coming month as well as implementing multi-factor authentication for our database. This had always been the intent and will in fact address a number of issues raised out of the operational review. The timing has been expedited somewhat due to the fact that cyber security insurers are requiring these two elements for coverage. This is not surprising given the exponential growth and use of IT due to the pandemic. The majority of this cost will be covered by the capital budget, however I will discuss additional expenses that may not currently be budgeted with the Treasurer and report back to Council.

Rec: Fill Known or anticipated staffing needs HR BUCKET

Please refer to the four hires noted above in response to this recommendation.

Rec: Build Leadership Competencies across the OAA

Along with Registrar Mills and Manager, Finance Pruden, I attended the three-day *Effective Management Course* with P.A. Douglas, November 17 -19, 2021. While there were some good elements - in particular identifying the four general types of leadership and employee styles as well as ways to improve your memory, we felt it lacked practical application and training. As such I will be reassessing whether to send other managers, or source out other options for the new year.

OAA Manager, Human Resource, Robin Darling and I attended a webinar on November 25 offered through HR Downloads called *Compensation and the Marketplace*

Executive Director, Registrar and Deputy Registrar to attend the following CLEAR webinar on January 5, 2022: *Building an Inclusive Regulatory Community – From Policy to Practice*

I will be attending the Grant Thornton CNPO Seminars: *Managing your team in a COVID-impacted operating environment* on December 08, 2021 along with the Manager, Finance.

Rec: Track & Report Expenses by Service Areas

The Manager, Finance has implemented an information and tracking system within the file server for the Team leads to view and track their own individual service area budgets. Around the middle of each month, she will save a new version of the Budget to Actual and the Chart of Account YTD for the previous month for staff to review.

Rec: Prepare for post pandemic work place

Refer to the information above re. Return to Office Plan/Policy. Also Mandatory Vaccination Policy is now in place.

Rec: Change Culture of Expected Overtime

OAA will respond to new legislation re. right to disconnect and develop a policy

Rec: Invest in EDI at the OAA

Doyle and Speigel to attend the following ICD webinar on December 1 - *Inclusive and Diverse Governance on NFP Boards*.

The OAA's annual demographic survey will be administered for the second time during December as part of the fee renewal process.

OAA Activities/Policy and Industry Relations

I will meet with Bruce Palmer, Pro-Demnity CEO and President on December 3 for our regular check in meeting.

On December 1, I was part of a panel discussion at Construct Canada with my counterparts at ACEC-Ontario and the OGCA. The session served as a sneak preview to the findings of the study commissioned by the Construction & Design Alliance Ontario (CDAO) regarding the relationships among project owners' upfront investment in the pre-project stage, the quality of design documents, and construction project performance. It is hoped that the study results will provide an objective framework for a change in the project delivery policies for public infrastructure.

On December 7 I will be attending a meeting with the Attorney General alongside OAA President Susan Speigel and OAA Manager, Government Relations & Policy, Adam Tracey. This meeting is the last of a large number of MPP meetings that PGR staff had arranged as part of our World Architecture Day/QP Picks program. We do try to meet annually with the AG specifically since they are the Minister responsible for the *Architects Act*.

National Initiatives

Along with Registrar Mills, I will be attending a meeting of the CALA Administrators and Regulatory Staff on December 16. We will be meeting with the members of the Committee for the Examination for Architecture in Canada to review elements of the feasibility study they are conducting re. an online examination process for the future. A full presentation will then be made to the elected members of CALA in the New Year.

Action: For information only. No action is required.

Attachments: OAA Return to Office Policy

Ontario Association of Architects -- Return to Office Plan

Draft date: December 2, 2021

TRANSITION PERIOD

Timing

January 17, 2022 – Staff begins to return to work onsite at OAA Headquarters.

January 24, 2022 - The OAA will be open to drop in for public/members and deliveries.

This is plan contingent on the Province of Ontario continuing to be in Stage 3, as well as any directives or guidelines issued by government and/or health officials that might suggest further lockdowns or work from home initiatives be enforced. Attention will also be paid to the number of COVID cases being reported.

Until decided otherwise, all existing safety protocols currently established for the OAA will be in force including social distancing and face coverings. High-frequency cleaning of surfaces, café, and washrooms will also be in place as well as contact tracing.

Transition stage

January to March will reflect gradual transition measures that will bring us to full implementation of a new modern Office/Remote Work Policy for the OAA in Spring 2022.

During the transition time, no more than approximately half of the entire staff should be onsite at one time to reduce the effect and outcomes if someone becomes infected with, or exposed to, COVID-19. The organization and composition of staff that are on site each day will be decided in consultation with the Executive Director, Manager Human Resources, and the individual service area Managers. A draft rotation plan will be developed by December 20, 2021. The rotation plan for the transition will require staff to be present at the office at least two days per week.

Council meetings may be held at the OAA beginning January 20, 2021, but this is subject to the agreement of the Council as a whole and further assessment of the situation at that time since an in person meeting of Council will exceed the above noted capacity limits. It is recommended that Committee meetings continue to be virtual until the initial January to March transition period has completed.

Exposure: If any staff member is directly exposed to COVID-19 or tests positive once this plan is implemented, those staff that have had contact with that person will need to be tested and/or work remotely for a period of 10 days. This is a moderate to high concern as it could have a considerable impact on well-being of staff, and OAA operations, should someone contract COVID. For this reason, the Association will operate with a maximum of half the staff onsite at one time as noted above.

Mental health and time for making arrangements: The OAA considers the mental health of its employees of paramount importance. This transition period is established to take mental health into consideration as well as current home life circumstances that have resulted due to COVID-19. Flexibility

will be considered in the context of the transition period to address these matters, and allow time to move fully into the future state.

Mandatory vaccination policy: In fulfilling its obligations as an employer to ensure the safety workplace possible, the OAA has implemented a mandatory vaccination policy for all staff, Council, volunteers, and visitors.

Workstations: Individual staff members will return to their assigned work spaces. As long as social distancing is possible, current work stations will remain as is. For those in U-shaped workstations who are concerned about the ability to maintain social distances, additional barrier systems will be offered. Any other staff that are concerned about their workstation are encouraged to address those concerns immediately with their supervisor or the Manager, Human Resources.

Office hours: The transition period and future state continue to be based on the OAA's current policy around working hours for staff. Staff will be required to work seven hours per day, generally between 8:00 a.m. and 5:00 p.m. Flexibility will be built in to this plan, however, if a staff member is choosing an option noted below that allows commuting to the office during non-rush-hour times. This plan does not anticipate any further changes to the OAA's hours of operation as an organization. In general, day to day hours of operations will continue to be 8:30 a.m. to 4:30 p.m. Summer office hours will also continue to be observed.

THE FUTURE STATE

A modern hybrid approach reflecting in-office/working-from-home options

The OAA staff and volunteers have demonstrated that working from home can be effective in carrying out the day to day operations and functions of the OAA.

The recent OAA Operational Review revealed that most staff would appreciate options to work from home two to three days per week. Some Committee members and Council have also expressed their satisfaction with virtual meetings as they reduce the time commitment by eliminating travel and increase accessibility for members in locations outside of Toronto.

Establishing a hybrid model that will allow staff to work in-office as well as at home will contribute to increased staff morale, flexibility for staff in life/work balance, reducing traffic congestion, reducing commuter stress, and reducing lost productivity sitting in traffic. This "Future State" model speaks directly to the OAA/Council goals and objectives regarding climate stability, accessibility, inclusion, and accommodation.

The approach outlined here has been designed with all these factors in mind as well as a mindset that acknowledges the trust the OAA has in its employees, empowers them to take responsibility for their individual positions, while at the same time being a part of a team effort to support this new approach. Throughout the pandemic, it has become more apparent than ever that the OAA's staff is its greatest asset, along with its volunteers. This model recognizes both of those communities and offers flexibility, acknowledging the varied and individual circumstances of everyone.

The options outlined below represent the future state as of Spring 2022. Provincial safety protocols will continue to be observed as required, which may continue the need for social distancing and face masks. It is expected there will be no restrictions on the number of staff at the office at one time. However,

provincial guidance will continue to be referenced if there are restrictions on the number of individuals permitted for indoor gatherings.

Notwithstanding the above and the idea that there will be options, it is also recognized that some Councillors and members, as well as staff, would prefer to be at the OAA Headquarters in order to conduct business. This is also considered below.

Options available to Council and Committees

Committees: Committees as a whole and/or individual members of the committee will have the opportunity to attend meetings virtually on an ongoing basis once the January–March transition period has successfully ended. If meetings are two hours or less in length, virtual meetings will be used.

Notice will be sent to each committee by staff with information regarding these options as well as a poll to determine the preference of committee members in terms of virtual versus in person meetings. Based on that information and discussion with the Chair a decision will be made to hold the meeting(s) in person, virtual, or in a hybrid manner.

Council meetings: It is anticipated that Council meetings will be held in person at the OAA Headquarters beginning in early 2022. Council will decide if they are prepared to host the January 20 meeting at the Headquarters. There will be a virtual option offered to Councillors who wish to attend remotely.

Note that, if a Committee /Council is meeting in person or using a hybrid approach, the appropriate staff support will be required to be in attendance at the OAA Headquarters. Staff wishing to view a Council meeting will be permitted to do so virtually.

Options available to staff in the future state of operations

Option 1—Full-time in-office during regular business hours: Any staff member who wishes to return full-time to the office may do so. Safety protocols will need to be observed until otherwise decided.

Option 2—In office during regular business hours (two to three days), work from home for remainder of the regular work week.: The number of days in the office, as well as which days, will be decided in consultation with the Manager and approval of the Executive Director.

Option 3—Combination of work from home/in office on a daily basis: This option is to allow for daily onsite work, but includes some time spent working at home in order to take into consideration traffic/travel time. For example:

1. Begin working at home 8:00 a.m. – 10:00 a.m. (2 hours).
 2. Travel to OAA between 10 and 11 a.m. (1 hour off the clock)
 3. Work 11 a.m. to 4:30 p.m. with 30-minute lunch.
- Total work hours = 7.

Option 4—Combination of Options 2 and 3: Work from home for two days, and then three days in the office with flex time for travel as demonstrated under Option 3 above.

Some services areas and/or positions are more difficult to work from home. Once OAA staff enter this future state, working from home is likely not an option and therefore Option 1 will be observed.

Examples include:

- Reception;
- Building Maintenance; and
- Office Assistant/meeting set up, etc.

Managers

Individual Managers will be responsible for:

- developing the schedule for in office/work from home for individuals under their supervision;
- Ensuring staff accountability and work is being performed;
- obtaining approval of the work plan for their service area by the Manager, Human Resources and Executive Director;
- monitoring hours worked by staff under their supervision in accordance with the OAA's policies re. 'Office Hours' and 'Overtime' and raising any concerns with the Manager, Human Resources.
- regularly evaluating the effectiveness of the plan and reporting such to the Manager, Human Resources and Executive Director.

Staff

Individual staff members will be responsible for:

- immediately advising their direct supervisor and the Manager, Human Resources if they have been exposed to someone that has tested positive for COVID-19;
- accommodating others in terms of collaborative work projects, as well as Committee and internal meeting schedules (i.e. if staff training, meeting requiring all staff in person -- staff will need to be prepared to respond to a request to be in the office – as much notice as possible will be given in these circumstances);
- adhering to the arrangements and schedule agreed to with their Manager (exceptions will be made under exceptional circumstances, including inclement weather);
- coming to the office when conditions at home (e.g. no power, Internet outage) do not allow work at home in any given day;
- attending staff functions on site when requested;
- undertaking training on conducting Zoom meetings within the OAA meeting rooms to accommodate hybrid meetings;
- accepting feedback from their supervisor as to any concerns or issues arising from a hybrid model;
- understanding the implementation of a hybrid model is a pilot project subject to change or being discontinued; and
- acknowledging that Options 2–4 are not required and, as such, staff will be responsible for their working conditions at home.

Large, public gatherings at the OAA

The first large gathering/event, outside of Committee/Council meetings, will not be held at the OAA until May 2022. This will likely be the OAA Headquarters' Grand Reopening and coincide with the OAA Conference in Toronto.

Equipment for remote work and expenses:

Each staff member that chooses to continue working remotely in accordance with the above options, will be reimbursed up to \$250 each year to cover costs associated with equipment and supplies required for their home working conditions. Staff choosing to work from home will be responsible for all other home office needs as well as internet.

Any equipment that staff have taken home during the pandemic will be recalled to the OAA Headquarters. A date will be identified accordingly.

Pilot project

This future state will be in a pilot process status to be reviewed following one year of operation and subject to evaluation in January 2023. These options can be changed at the discretion of the Executive Director and Manager Human Resources, in consultation with the OAA Governance Committee. Implementation of these options does not constitute formal or legal changes in the contractual engagement of any staff member. If issues arise with this future state, they will need to be addressed immediately, and/or options can be removed with reasonable notice.

Memorandum

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
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Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 6.3.a

From: Kristiana Schuhmann, Vice President, Strategic

Date: November 26, 2021

Subject: **Update on the activities under the Vice President, Strategic portfolio**

Objective: To update Council about activities under the Vice President, Strategic portfolio.

Highlights

[Activities Report – Vice President, Strategic](#)

[PACT Updates](#)

[SBEC Updates](#)

[Construction Design Alliance of Ontario \(CDAO\)](#)

Activities Report – Vice President, Strategic

- SBEC meeting: December 15, 2021
- PACT meeting: December 2, 2021
- Council Executive meeting: November 24, 2021
- PACT applicant interviews: November 12, 2021
- Policy and Government Relations touch base meetings: October 25, 2021, November 8, 2021, November 22, 2021, December 6, 2021

- MMAH Building Code Consultation: November 23, 2021

PACT Updates

PACT met last on October 14, 2021 and will meet again on December 2, 2021. This will be the Committee's final meeting of this year. PACT is working on various items including:

- **Long-term Care Research Project** – Although work on the LTC research project continues to move along, OAA is still awaiting receipt of the final contract. Currently, no contract for this project has been signed and no funds from the OAA have been issued.
- **New Legislation** – Policy and Government Relations (PGR) staff are closely monitoring two newly proposed pieces of legislation that government is fast-tracking through the system. The first of these is Bill 27: *Working for Workers Act, 2021*. This proposed legislation does a number of things including prohibiting non-compete clauses and banning non-health regulators from having Canadian experience requirements as part of their licensing process. Bill 27 was quickly debated and then called before Standing Committee with very little notice, requiring the OAA President to quickly write and submit a response in turn. The OAA submission can be found in the Government Relations portal [here](#), and is also attached to this memo for information.

The other piece of legislation is Bill 37: *Fixing Long-Term Care Act, 2021*. This proposed legislation intends to improve staffing and care, better protect residents through improved accountability, enforcement, and transparency, and facilitate the building of modern, safe, comfortable long-term care homes. This legislation was also quickly debated and then called before a Standing Committee with very little notice, again requiring the OAA President to quickly write and submit a response. The OAA submission can be found in the Government Relations portal [here](#), and is also attached to this memo for information.

Both submissions have been shared with the OAA membership via OAA News.

- **City of Toronto Planning and Housing Committee** – The City of Toronto introduced an interim report on *Expanding Housing Options in Neighbourhoods: Multiplex Study*. Aimed at making multiplexes permissible throughout most of the City, Globe and Mail writer Alex Bozikovic described the initiative as “the boldest and most progressive planning policy to emerge from City Hall since the amalgamation of Toronto in 1998.” PGR staff will monitor the file and consider ways for the OAA (and/or TSA) to participate.

- **Committee Appointments** – Recommendations for PACT are present elsewhere in the Council package.

SBEC Updates

SBEC met last on October 28, 2021 and will meet again on December 15, 2021. This will be the Committee's final meeting of this year. Some members of SBEC also participated in the OAA/TSA virtual visit on November 18. PGR staff attended a joint Natural Resources Canada (NRCan)/City of Toronto webinar on NRCan Energy Efficiency Programs for the Commercial Sector, on November 25, 2021.

SBEC is working on various items, including:

- **Toronto Green Standard, Version 4** – Lisa King, Senior Environmental Policy Planner, City of Toronto, will join SBEC to discuss the upcoming implementation of the Toronto Green Standard, Version 4. The Committee will also explore the best options to disseminate information about the updated TGS to the membership.
- **Old Growth Timber** – *Canadian Architect* has agreed to publish an article on old growth timber that SBEC members are working on. It is anticipated that this article will be ready for publication in late winter or early spring, 2022.
- **Technical Jury for OAA Design Excellence Awards** – SBEC members, Karl van Es and Veronica Madonna have volunteered to undertake the technical jurying of the upcoming OAA Design Excellence Awards submissions. This year, the technical jury will use the TEUI calculator to verify accuracy of submission data.
- **Energy Efficiency Loans & Grants** – OAA staff have been tasked with investigating the availability of energy efficiency loans and grants as a follow up to requests emerging from the society visits.
- **Ontario Home Builder Magazine article on embedded carbon/zero carbon/sustainable residential construction** – SBEC member Veronica Madonna was asked to collaborate with President Spiegel on an article for Ontario Home Builder Magazine.

Construction Design Alliance of Ontario (CDAO)

The last CDAO AGM and Forum meeting was held on October 25, 2021, and the first meeting of 2022 is currently in the process of being scheduled. At the AGM, Sharon Portelli from ARIDO was selected to be CDAO's new Chair. The OAA has pushed for the climate emergency to be added as a CDAO strategic priority.

Represented by Executive Director Kristi Doyle, the OAA (and other CDAO members) will participate on a panel, *Enhancing Project Delivery through Pre-project Investment*, at The Buildings Show. This panel will discuss key findings arising from research done by the Ryerson University Institute for Infrastructure Innovation.

Action: **None. For information only.**

Attachments: Bill 27 submission (November 18, 2021)
Bill 37 submission (November 25, 2021)

Established in 1889, the Ontario Association of Architects (OAA) is the self-regulating body for the province's architecture profession. It governs the practice of architecture and administers the Architects Act in order to serve and protect the public interest.

Standing Committee on Social Policy
c/o Tanzima Khan, Clerk
99 Wellesley Street West
Room 1405, Whitney Block
Queen's Park
Toronto, ON M7A 1A2

[sent via email]

November 18, 2021

Re: OAA Submission on Bill 27

Dear Chair and Members of the Standing Committee,

The Ontario Association of Architects (OAA) thanks you for the opportunity to comment on Bill 27, *Working for Workers Act*, 2021. This legislation touches on important aspects related to workers' rights and the regulatory licensing process.

With regard to the former, the legislation does not adequately protect against unfair labour practices within the architecture profession. The OAA strongly encourages legislative reform to rescind exemptions in the *Employment Standards Act* related to architecture.

On behalf of the OAA, I am submitting this response. My colleagues and I would be happy to engage with you further as you prepare for clause-by-clause reading and eventual passage in the legislature.

SCHEDULE 2: EMPLOYMENT STANDARDS ACT, 2000

Policy on disconnecting from work

The OAA supports the right to disconnect, and encourages this legislative provision to be extended to the architecture profession. The OAA is concerned these protections, if passed, will not extend to architects and Licensed Technologists OAA as they are currently exempted from comparable provisions within the *Employment Standards Act* (by virtue of [O. Reg. 285/01: WHEN WORK DEEMED TO BE PERFORMED, EXEMPTIONS AND SPECIAL RULES](#)).

A right-to-disconnect policy offers little benefit to those in the architecture profession because the provincial government currently exempts these individuals from any rights or entitlements related to:

- minimum wage;
- hours of work;
- daily rest periods;
- time off between shifts;
- weekly/biweekly rest periods;
- eating periods;
- overtime;
- public holidays; and

- vacation with pay.

If the government is committed to the right to disconnect, then it must also rescind the architectural exemptions related to the *Employment Standards Act*—preferably through an amendment at clause-by-clause. This can quickly and easily be integrated into the Bill by integrating a provision to remove (or trigger the removal) of clause 2.1)(a)(i) from O. Reg 285/01.

The OAA has repeatedly requested this regulatory amendment as far back as March 2017. The OAA received a commitment from the Ministry of Labour in 2017 that said exemptions would be removed, but this commitment has not yet been honoured. We would welcome the government's support for this important change.

Non-compete agreements

Recently, the OAA has become aware of a growing use of non-compete agreements in architectural employment contracts.

On October 26, I sent out [an email](#) to all those who have status with the OAA, reminding our members that the use of non-compete agreements—particularly against intern architects—is inappropriate, and may prevent an intern architect from being able to gather the necessary experience and hours required for licensure. In this communique, I also cautioned employers that it is the regulator alone—and not individual firms—that can determine eligibility for licensure and practice.

The OAA conditionally supports legislative changes to remove non-compete agreements from contracts.

SCHEDULE 3: FAIR ACCESS TO REGULATED PROFESSIONS AND COMPULSORY TRADES ACT, 2006

Canadian experience requirements

While the OAA is supportive of efforts to reduce unnecessary barriers to licensure, it does not agree with recent characterizations of Canadian experience requirements as “bureaucracy and red tape.” Canadian experience requirements—at least in relation to the practice of architecture—align with legislative requirements set out in the *Architects Act* to serve and protect the public interest.

The OAA has been an active participant in ongoing conversations with the Office of the Fairness Commissioner, and remains committed to reducing barriers to licensure. Such efforts include the *Canberra Accord on Architectural Education* recognizing educational equivalencies, various mutual recognition agreements (MRAs) related to reciprocal licensure, and actively supporting the Broadly Experienced Foreign Architect (BEFA) program—an alternative pathway for foreign architects to become licensed.

The *Architects Act* also contains provisions for an exemption request to OAA Council. The purpose of Section 13(1)(d) and (e) of the *Act* and Section 33 of the Regulation is to provide a procedure for an applicant who can demonstrate their

qualifications, knowledge, or experience merit exemption. Council will consider requests wherein the applicant is very close to meeting the requirements, but is unable to do so because of personal hardship or special circumstances, or where their qualifications, knowledge, and experience are of such an exceptional nature.

As per Section 13(3)b of the *Architects Act*, the Registrar may refer an application for the issuance of licence to the OAA's Experience Requirements Committee. This Committee is tasked with determining whether the applicant has met the experience requirements prescribed by the Regulations for the issuance of licence, or if the applicant should be granted an exemption from "all or part of the academic and experience requirements set out in this Regulation" on account of their qualifications, knowledge, and experience. Again, these recommendations are subject to Council's final determination.

The OAA also grants project-specific temporary licenses to practitioners and practices, and allows foreign architects to practice under the supervision of a licensed architect. Put together, these measures allow significant labour mobility for foreign-trained architects to work or become licensed in Ontario.

Regarding the aforementioned MRAs, it is important to note that when striving to implement additional reciprocal agreements, the OAA identified significant deficiencies in the educational and/or licensing regimes of many other jurisdictions.

Architects in Ontario are highly trained and specialized individuals, requiring:

- an undergraduate and graduate degree in architecture;
- completion of 3,720 hours of architectural experience addressing each of the following competencies
 - o programming;
 - o site and environmental analysis;
 - o schematic design;
 - o engineering systems integration;
 - o building cost analysis;
 - o code research;
 - o envelope detailing;
 - o design development;
 - o construction documents;
 - o specifications and material research;
 - o document checking and coordination;
 - o energy literacy/sustainability;
 - o procurement and contract award;
 - o construction phase – office;
 - o construction phase – site;
 - o management of the project; and
 - o business/practice management;
- collaboration with a supervising architect and mentor; and
- passing and/or completion of additional examinations including the Examination for Architects in Canada (ExAC).

It takes architects roughly the same length of time to become licensed in Canada as it does a medical doctor.

Foreign-trained architects, where subjected to less-stringent academic or licensing standards, should be required to gain equivalency with domestically trained architects. Indeed, the goal must be to level the playing field and to ensure licensing requirements expressly serve and protect the public interest. Where foreign-trained architects have equivalent qualification, the OAA has multiple methods that allow alternative means to assess competency and gain licensure.

The OAA is committed to improving and enhancing the pathways to licensure to eliminate unnecessary barriers to the profession of architecture.

Expedited registration

The OAA supports provisions for expedited registration in the case of emergency, although it is important to note licensing and other regulatory processes related to architecture were not materially disrupted by the pandemic.

Thanks to previous experience with remote work during our headquarters renovation, the OAA was able to quickly mobilize its staff to work from home virtually. This ensured regulatory processes continued to function, serving and protecting the public interest with little impact on daily operations.

Supporting access of internationally trained individuals to regulated professions

The OAA strongly supports efforts to encourage broader participation of internationally trained individuals in our profession when they possess equivalent qualification (or are willing to take the necessary steps to obtain it). The Association recognizes that diverse backgrounds, training, and approaches bring tremendous value to the profession and our province.

The Ontario Association of Architects is a progressive regulator committed to serving and protecting the public interest through regulating the practice of architecture. On behalf of the OAA and the profession, I encourage a legislative amendment to remove architectural exemptions from the *Employment Standards Act*, and welcome further consideration or discussion around the other matters reflected in our submission.

Sincerely,



Susan Speigel, Architect
OAA, FRAIC
President



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Established in 1889, the Ontario Association of Architects (OAA) is the self-regulating body for the province's architecture profession. It governs the practice of architecture and administers the Architects Act in order to serve and protect the public interest.

Standing Committee on the Legislative Assembly
c/o Valerie Quioc Lim, Clerk
99 Wellesley Street West
Room 1405, Whitney Block
Queen's Park
Toronto, ON M7A 1A2

[sent via email]

November 25, 2021

Re: OAA Submission on Bill 37

Dear Chair and members of the Standing Committee,

The Ontario Association of Architects (OAA) commends government for introducing comprehensive legislation on long-term care, and welcomes the opportunity to comment on Bill 37, *Fixing Long-Term Care Act, 2021*. This legislation touches on important aspects related to fixing long-term care in the province; however, it fails to address the design of long-term care homes as a key part of addressing the problem. While a commitment to maintaining the building in a safe condition is included, this also needs to be present in a more consistent manner throughout the legislation.

As the OAA and its membership watched the tragedy of long-term care in Ontario unfold throughout the COVID-19 pandemic, we have all taken the opportunity to begin exploring the design interventions that can help mitigate the effects of this crisis and prevent it from ever happening again.

As the regulator for the profession responsible for the design of built environments where Ontarians live, work, and play, and entrusted to serve and protect the public interest, the OAA is keen to continue working alongside government to fix long-term care in our province.

The Association has taken the opportunity to review the proposed Bill 37, and the following is a series of recommendations based on this legislative review:

Continuous Quality Improvement:

The OAA is encouraged to learn that "continuous quality improvement" is contemplated in the proposed legislation. While a focus on patient satisfaction and outcomes is a significant measure of quality improvement, the opportunity to explore innovative and evidence-based design of long-term care homes should also be integrated into government's approach to "continuous quality improvement".

Section 44 of the proposed legislation states that, "The Minister may establish a Long-Term Care Quality Centre" that will support mission-focused organizations and advance and share research on innovative and evidence informed person-centred models of care. **The OAA recommends that the advancement and**



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sharing of research on innovative and evidence informed design of long-term care homes be included as an additional function of the Long-Term Care Quality Centre.

This recommendation is one that the OAA has heard loud and clear from members who design long-term care. In April 2021, the OAA hosted a member roundtable about the design of long-term care homes attended by 15 members with a combined 300 years' experience designing long-term care in Ontario. There was a resounding call for government support of design innovation. Moreover, the OAA has invested in this cause by supporting a research study with the University of Toronto and Jacobs Consultancy Canada Inc. This study explores design best practices that maximize infection control and patient quality of life outcomes. The final recommendations from this study will be submitted to government and can inform innovative and evidence-based approaches to the design of new long-term care homes in the province, as well as renovations to existing homes.

The addition of long-term care beds in the province is not enough; these beds must be better suited to infection control and patient quality of life outcomes. By supporting research on innovative and evidence informed design of long-term care homes, government can uniquely position itself to deliver the highest return on its investment to the betterment of everyone in Ontario.

Licensing:

Government has positioned Bill 37 as a tool to enhance transparency and improve enforcement. To be effective at doing this, measures need to be put in place that require licensees to bring their facilities up to the current Design Manual standards, and to update them as these standards are updated. As noted in the Auditor General's report on long-term care that was published in April 2021, over 40% of long-term care homes in Ontario are not currently compliant with 1999 design standards and many residents continue to share rooms with three additional people.

One major contributing factor to the 3800 deaths that have occurred in Ontario long-term care homes is the widespread reality of double- and multi-occupant bedrooms throughout the province. These bedroom configurations make physical distancing very difficult and increase the risk of infection spread. At the time of publication of the Auditor General's report, neither the Ministry nor the LHINs had record of how many residents were living in rooms designed to accommodate four beds (C and D classified rooms). However, it is known that in for-profit homes where more than half of the residents contracted COVID-19, bedroom configurations were primarily (more than 70%) multi-occupant suites.

In order to be eligible for licensure, the **OAA recommends that government require licensees to demonstrate how their homes are designed to meet the current design guidelines, including the accommodation single occupancy bedrooms.** In the case of existing homes, inspectors should be required to enforce this single occupancy requirement within a shorter, defined period.

Ontario Building Code:

Upon review of the proposed legislation, it is notable that there is no mention of updates to the Ontario Building Code as it pertains to long-term care (and other congregate living environments). The following recommendations for Code changes are straightforward and could have a significant impact on quality improvement in long-term care.

The first recommended change is to section 3.7.1.3. Sleeping Areas in Group B and Child Care Facilities, which currently states that:

- (2) Sleeping rooms for residents in long-term care homes shall have, exclusive of space provided for washrooms and for built-in or portable clothes closets, a floor space not less than,
- (a) 10.22 m² in a single-bed unit,
 - (b) 16.72 m² in a two-bed unit,
 - (c) 25.08 m² in a three-bed unit, and
 - (d) 29.73 m² in a four-bed unit.

The OAA recommends that this section should be amended to remove consideration of three- and four-bed units and should include the requirement for a vestibule between the sleeping room and any corridor.

The vestibule could support hand hygiene through the inclusion of a washbasin, and could function as storage space for personal protective equipment and linens. This amended section should read as follows:

3.7.1.3. Sleeping Areas in Group B and Child Care Facilities

- (2) Sleeping rooms for residents in long-term care homes shall have, exclusive of space provided for washrooms and for built-in or portable clothes closets, a floor space not less than,
- (a) 10.22 m² in a single-bed unit, and
 - (b) 16.72 m² in a two-bed unit shared by consenting residents.

(3) [new inserted article] Sleeping rooms for residents in long-term care homes shall have a vestibule, not less than 8 m² in area, between the sleeping room and any corridor.

The second recommended change is to section 3.7.4.4. Plumbing Fixtures for Care, Care and Treatment or Detention Occupancies, which currently states that:

- (2) In a Group B, Division 2 or 3 *occupancy*, washrooms shall be provided so that each washroom,
- (a) serves not more than four patients or residents,
 - (b) is accessible from patients' or residents' sleeping rooms,
 - (c) contains one water closet, and
 - (d) contains one lavatory.

The OAA recommends that this section is amended to include single occupancy bathrooms in long-term care and to require a shower in each

of these single occupancy bathrooms. The amended section should read as follows:

3.7.4.4. Plumbing Fixtures for Care, Care and Treatment or Detention Occupancies

(2) In a Group B, Division 2 or 3 *occupancy*, washrooms shall be provided so that each washroom,

- (a) serves not more than:
 - i. four patients, or
 - ii. **one resident in long-term care, or**
 - iii. **two consenting residents in long-term care; and**
- (b) is accessible from patients' or residents' sleeping rooms,
- (c) contains one water closet,
- (d) contains one lavatory, and
- (e) in the case of a long-term care facility includes one shower.**

These simple Code changes can lead to significant quality improvements for long-term care residents and the time to implement them is now. Ontarians living in long-term care have been through enough tragedy in the last two years and these changes can help to mitigate further tragedy from unfolding.

Long-term Care Design Manual:

The OAA is keenly aware of the importance of the Long-term Care Design Manual's role in regulating the design of these homes; however, this manual appears to be updated at irregular intervals (the last update was 2015, and prior to that was 1999). **In order to strengthen Bill 37 and to improve long-term care for all Ontarians, the OAA recommends that the legislation mandate:**

- **Regular intervals for updates to the Design Manual;**
- **Shortened, defined timeframes for existing long-term care homes to come up to the current standard; and,**
- **The inclusion of Design Manual compliance inspections along with the other quality improvement inspections that the legislation currently proposes.**

“Safe Condition and in Good State of Repair”:

Inspections to ensure compliance with the current Design Manual, the Ontario Building Code, and provisions within this Act or related regulations, are of particular importance. In the Auditor General's report, it was noted that licenses for approximately 26,500 beds are set to expire in 2025, but it is not clear how many of these meet 2015 (or even 1999) Design Manual standards. Similar to condominium reserve fund inspections which are mandated by the Condominium Authority of Ontario to occur within the first year of the condominium incorporation and every three years following that, the **OAA recommends that similar inspections are done within the first year of licensing and every three years following that. Furthermore, inspection reports should be made publicly available to enhance transparency about long-term care quality.**

Further amendments to the legislation should be considered. While this legislation begins to address recommendations in the COVID-19 Commission Final Report to prescribe the staffing mix under the Act, the maintenance and upkeep of the

facility remains largely undefined putting residents at potential risk. S19(2)(c) does clarify that every licensee is responsible to ensure that the home is “maintained in a safe condition and in a good state of repair” but how this gets operationalized within homes should be better defined.

Good state of repair should be further assigned as a responsibility to one of the designated staff in s76, most likely to the Administrator unless legislators determine that a new person should be defined within this section. Training (s82) should require that staff be trained on how to report building-related deficiencies to this designated individual. S84 and 85 should be amended to make it clear to residents or substitute decision-makers how they communicate building-related complaints. This amendment could occur in s84(2)(e) or be added as a standalone subsection.

The OAA hopes that inspections (s144 onwards) explicitly cover the home being “maintained in a safe condition and in a good state of repair” but advises government to make this explicit if not adequately reflected in existing or envisioned inspection processes and/or roles and responsibilities.

The OAA believes that s159 (suspension or revocation) would cover failing to maintain the home in a safe condition and good state of repair, but posits that government may want to explicitly add this failure under subsection (2) as a clearly articulated reason why a license may be suspended.

The OAA believes that s184(2) would allow for the Minister to issue operational or policy directives on homes being “maintained in a safe condition and in a good state of repair” but posits government may want to amend s184(2)(a) to read “the proper management, operation **and maintenance** of long-term care homes in general.”

These clauses will help to operationalize s19(2)(c) and to ensure that homes remain in the “safe condition and in a good state of repair” that residents deserve and that the legislation intends. In this spirit, the OAA hopes that once the legislation is passed, the Lieutenant Governor in Council will also take full advantage of S193(2)(17). The OAA welcomes the opportunity to collaborate on establishing those regulations.

It is important to note that earlier in the year, the OAA tabled 27 recommendations to the Minister of Long-Term Care. While many of these recommendations may reside more at a policy level, we do still encourage members of the Standing Committee to consult both this deputation and our earlier submission and to determine if any recommendations could be reconciled within the existing legislation; for instance, requiring long-term care homes to be integrated within existing communities as the default.

On behalf of the OAA, I thank you for the opportunity to share the architecture profession’s recommendations and encourage you to reach out to me further should you wish to discuss clarifications, legislative changes, or how we can work with government to help ensure Ontario’s long-term-care homes can better serve the public.

Sincerely,

A handwritten signature in black ink, appearing to read 'SSpeigel'.

Susan Speigel, Architect
OAA, FRAIC
President



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The Honourable Rod Phillips
Minister of Long-Term Care
Main Legislative Building, Queen's Park
110 Wellesley Street West, Room 436
Toronto, ON M7A 1A2

July 8, 2021

Sent via email: rod.phillips@pc.ola.org

Re: Long-Term Care Submission

In March 2020, we collectively began to witness the unimaginable: a hundred-year pandemic sweeping across the globe, infecting thousands across Canada, but particularly vulnerable residents and loved ones in long-term care (LTC) homes.

Deeply moved by the unfolding tragedy, the architectural profession began to explore what it could do to help mitigate the effects of the crisis. As the regulator of a profession responsible for the design of Ontario's built environment, and entrusted to serve and protect the public interest, the OAA is keen to play an important role in assisting the Government as it moves forward with this critical task.

In *Ontario's Long-Term Care COVID-19 Commission: Final Report*, the province's Long-Term Care COVID-19 Commission (the Commission) reminds us that, "Ontario's legislative promise to long-term care residents is to provide residences that are 'safe, comfortable, home-like environment[s]' that support 'A high quality of life'." The *Ontario Residents' Bill of Rights* requires a safe environment for every resident. Ontario has not met this challenge, and we must collectively strive to do better.

The OAA submits the following 27 recommendations for consideration, and looks forward to discussing them further as we work together to solve this urgent crisis. These recommendations are covered in the pages that follow, categorized by broader subject, and can be seen collectively in Appendix B.

FUNDING

In April 2021, the OAA hosted a virtual roundtable event that brought together those in the architecture profession with experience in designing long-term care homes. The participants agreed that good policy and adequate funding are required to create a successful space. In the most recent iteration of the *Long-Term Care Home Design Manual* (2015), attempts were made to shift thinking away from institutional settings toward the creation of home-like environments. However, despite many revisions, this desired outcome is often contradicted by the document and the way it is applied. Participants agreed a shift in the guidelines is necessary to focus more on performance and less on prescriptive rules.

At the roundtable, participants discussed the importance of funding to support innovations in design and care to improve the quality of LTC homes across Ontario. They noted that their clients are keen to innovate, but lack the financial

ability to do so. Trying to secure funding for any measure that goes beyond the guideline is difficult. It is further complicated by the unprecedented realities brought on because of the COVID-19 pandemic, such as the quadrupling of construction material costs (namely lumber and steel) that have resulted from supply shortages. Architects are eager to innovate but, in the absence of appropriate funding, very little innovation is possible.

Recommendation #1: Increase capital funding for long-term care homes by indexing the Capital Funding Model to annual construction cost data.

PROCUREMENT

In their final report, the Commission cites “credible estimates” indicating the province will require “an additional 96,000 to 115,000 long-term care beds by 2041.” As this is a dauntingly high number, the natural response may be to do whatever it takes to get as many shovels in the ground as quickly as possible. However, this approach poses great risk—at best, from failing to realize the full potential of LTC homes Ontarians deserve and, at worst, from repeating the mistakes of the past.

We should not stop construction underway, but we must recalibrate in real time how we procure, design, construct, and maintain long-term care homes. Extraordinary costs may drive procurement officials and legislators to the lowest bid, but the focus is, and has always been, on best value. We must use our investment wisely to get the best and most innovative long-term care homes to protect and enrich the lives of our residents.

The Commission recommends separating the delivery of services from the construction of long-term care homes. It is questionable whether a profit incentive will actually decrease the costs of construction, particularly when considered over the lifecycle of the building. Short-term decisions geared toward the handover may result in significant post-occupancy costs in terms of both operations and maintenance.

It is understandable for investors and developers to focus only on the part of the equation that concerns them. However, a sustainable, long-term approach will be paramount in warding off the problems that are almost otherwise guaranteed to manifest.

More broadly, on the subject of private versus public procurement, the OAA has members with opinions across the spectrum. Some diametrically oppose P3s, while others support the model. Throughout these concerns, it has become apparent that P3 procurement can contribute toward a solution, or actively work against one. The procurement model must be carefully considered before it is employed. Simply put, a P3 is not the only way to design and construct these facilities—this delivery method simply forms a part of the solution at best.

While procurement may seem innocuous, it has reared its head in subtle but unmistakably significant ways throughout the course of the crisis. Indeed, the Commission flags that while 90% of the existing stockpile of personal protective equipment was destroyed, “successive governments spent three years deliberating procurement policy options” instead of replenishing the stockpile. We must focus some of our attention on getting our procurement processes right.



Recommendation #2: Focus on the long-term cost, not the lowest cost.

Recommendation #3: Find the right mix between traditional and P3 procurement.

INVESTING IN DESIGN

Regardless of whether these facilities are procured through a public or private model, the selection process—particularly for architecture and engineering services—must change. For well over a decade, the industry collectively has advocated for a change from lowest bid procurement to qualifications-based selection (QBS).

While this may sound self-serving, there is an irrefutable body of evidence that shows lowest-bid value cannot be effectively used in the procurement of consulting services. Repeatedly, governments at the municipal, provincial, and federal levels have used low-bid procurement to disastrous effect. Setting aside the detrimental effects to taxpayers and the institutions themselves, lives have even been tragically lost in the process. These realizations have been accepted long-ago by our counterparts in other jurisdictions.

Qualifications-based selection has been federally required for the procurement of architectural and engineering services in the United States since 1972 (via the passage of the *Brooks Act*). “Mini *Brooks Acts*” have been passed by almost every state legislature, and further mirrored down within many municipalities. While Ontario may have pride in our procurement process and like to view ourselves as leaders, that pride is largely misplaced. In this particular regard, we are more than a half-century behind our closest neighbour.

Recommendation #4: Adopt QBS as the procurement method for architecture and engineering services.

STRIKING THE RIGHT BALANCE

Symptomatic or asymptomatic spread. Existing threats and future unknowns. Architects must plan for these challenges, incorporating necessary separation, barriers, and safety measures while delivering meaningful homes for our citizens. At the OAA’s roundtable, architects spoke at length about this balance. We must not move too far toward a hospital or institutional setting, or else we break out legislative (and moral) commitment to provide meaningful living spaces. However, we must design spaces that can reduce or even eliminate threats from outbreaks, something the Commission notes are “common in long-term care homes.”

All the while, we must also change our very way of thinking, recognizing that the needs of long-term care residents have significantly changed, and likely will continue to change. As the Commission notes, “[w]hen compared to long-term care residents a decade ago, today’s residents experience higher percentages of cognitive impairment, physical disability, medical instability and incontinence.”

The architecture profession requires a supportive government to be able to move us all out of that paradox of providing adequate medical care and infectious



disease control while maintaining a home-like environment, and recognizing significantly higher and evolving resident needs. Architects need every possible tool at their discretion given the Herculean task before them.

Recommendation #5: Provincial policy and funding must empower architects to design spaces that rise to the challenge of infection control and increasingly complex medical needs, while maintaining a home-like environment.

INNOVATION

The Commission celebrates “innovative programs to strengthen quality of life and care in long-term care homes,” including “better home design to meet the evolving needs and acuity of long-term care residents.” While we have many exemplary architecture practices who have delivered exemplary designs, we must provide broader guidance and leadership to the industry.

The OAA is supporting a research study with the University of Toronto that will conduct a literature review and perform post-occupancy assessments on well-regarded homes in Ontario to identify best practices that maximize infection control, occupant satisfaction, and well-being. While we will not know the findings until the study is completed, we would encourage the government to review these recommendations once available and to work with our industry to set improved standards across the board for all long-term care homes.

Recommendation #6: Review findings and work with OAA to integrate best practices into the next iteration of the *Long-Term Care Home Design Manual*.

FOSTERING A NEW SELF-REGULATED PROFESSION

As a regulator entrusted to serve and protect the public interest, the OAA noted the Commission’s recommendation on making personal support workers (PSWs) a regulated profession. The OAA would support government in this mandate, particularly the recommendation to bridge a new group of regulated professionals under the umbrella of an already-established regulator. This model would appear to parallel the one we have proposed for other professionals in the consulting industry.

Recommendation #7: Consider making PSWs a regulated profession under the umbrella of an already-established regulator.

NEW DESIGN STANDARDS

The Commission flags concerns around the physical design of older long-term care homes—in particular, three- and four-bedrooms. The OAA expressly shares these concerns, and we are in agreement with our experts that single occupancy rooms are a requirement both from a best practice, Infection Prevention and Control Canada (IPAC) standpoint, human dignity, and from a user preference

standpoint. [Some studies](#) indicate residents prefer their own room by a margin of 20 to 1.

However, things are not quite so simple. As our roundtable participants point out, even if single-occupancy rooms should be the requirement, there must be flexible spaces allowing for deviations from the prevailing standard. Examples include space for specialized medical equipment or the need to accommodate elderly couples entering (or wishing to enter) a facility together. It is inhumane to separate a couple, family member, or possibly even a friend because a policy is too prescriptive and inflexible.

This flexibility could most likely be accomplished by specifying a proportion of couples suites or larger rooms, which could accommodate these and other needs as they arise. (A recent report prepared for the Alberta Department of Health recommended eight couple suites per 100 units) This approach would be consistent with Ontario's *Residents' Bill of Rights* which specifies "[e]very resident has the right to share a room with another resident according to their mutual wishes, if appropriate accommodation is available."

On a similar note, in its report, the Commission identifies the 2015 requirement for a washroom in all resident bedrooms. The OAA is not aware of any discussions to change or lessen these requirements, but recommends the single-occupancy washroom requirement be upheld not only in new facilities, but also in the retrofit of older ones. The Commission detailed stories of residents who were denied the right to a shower due, in part, to risks around contagion. The only way to resolve this would be to also require a shower in each of these washrooms.

Throughout the Commission's findings, as well as other various studies, cohorting and isolating were critical to reducing the spread of COVID-19. The OAA's own roundtable echoes these findings, recommending smaller cohorts, improved funding models, and policies supporting small-scale "household" models. Various other targeted design recommendations were also shared, including:

- Increasing dining and lounge space to allow for great social distancing or subdividing space when heightened transmission risks exist;
- Increasing staff space to reduce the risk of transmission between staff members;
- Incorporating a personal protective equipment (PPE) station at the entrance to each room; and
- Creating a unified standard for ventilation of all long-term care homes, incorporating best practices from hospital ventilation.

The importance of clean air is becoming increasingly clear and its relevance is being explored in the context of shared spaces and other congregate living environments. Recent reports from the [U.S. Centers for Disease Control \(CDC\)](#) found that COVID-19 incidence was 39% lower in schools that improved ventilation.

Recommendation #8: With the exception of a set proportion for couples suites or larger rooms that allow for flexibility, require all long-term care homes to have single-occupancy rooms with individual washrooms containing a shower.

Recommendation #9: Update and rapidly deploy a new *Long-Term Care Home Design Manual*.

Recommendation #10: Update the Ontario Building Code and *Long-Term Care Home Design Manual* to explicitly recognize and address infection control in design, incorporating relevant CSA standards.

Recommendation #11: Consider developing a national standard on long-term care design to reduce regional variation and bring together national best practices.

Recommendation #12: Reflect the current literature on airborne (specifically aerosol) transmission of COVID-19 in the design and retrofit of long-term care homes.

Recommendation #13: Improve ventilation in long-term care to provide clean air, particularly in older facilities.

ZONING AND DELAYED PLANNING APPROVALS

The Commission estimates a cost of \$19.8 billion to build enough beds “to replace the expiring licences and to accommodate the current waitlist at the estimated cost of \$350,000 per bed.” Costs to meet the longer-term demand is significantly higher, at a projected price of \$33.6 billion. Innovative architectural solutions can help to deliver those necessary investments. The Commission also identified another critical factor, which they subtitle as “Delayed and Prolonged Licensing Approval Process.”

At multiple points, the Commission flags that alongside Ministry approvals, “zoning issues at the provincial and municipal level...are blocking redevelopment.” Indeed, the OAA has seen the recent employment of Minister’s Zoning Orders (MZOs) for long-term care homes, but these represent site-specific and one-off solutions to a broader problem. Slow and ineffective approval processes are causing perplexing delays not only to long-term care facilities, but also to all development across the province. The OAA has advocated for significant reforms to site plan approval and the planning approval process in general, for nearly a decade, with cautions dating back 15 years.

The province should focus some of its attention on significant reforms to the *Planning Act* to expedite planning approvals. The Commission stresses that “a new model of building homes [is an] urgent necessity,” and the OAA agrees with this assessment. Expediting planning approvals for long-term care homes would be laudable. Expediting planning approvals for Ontario would be even more beneficial as it would expedite and lower costs not only for the development and redevelopment of long-term care beds, but also other critical infrastructure including hospitals and affordable housing.

In 2018, the OAA commissioned Altus Group to study the impacts of site plan delay. The [resulting report](#) found the total costs of delay each year to stakeholders could amount to as much as \$900 million per year in Ontario—a number believed to be a conservative estimate. Institutional building permits account for over 10% of that total, with estimated delays costing nearly \$100 million per year. This estimate is not solely for long-term care, but rather for all institutional building permits subjected to site plan approval—however, a rising tide lifts all boats.

At the OAA’s roundtable, it was recommended that development charge waivers be enacted, and that long-term care homes become eligible to be built on



employment lands given that these facilities generate more job opportunities than many other uses that are currently permissible.

Recommendation #14: The Province should focus significant attention on planning approval reforms, including greater use of as-of-right zoning and expediting the site plan control process.

Recommendation #15: While these reforms could be targeted toward long-term care, the Province should recognize that urgent reforms are required for *all* institutional projects and for building in Ontario more broadly.

PERSONAL PROTECTIVE EQUIPMENT

Through the course of the pandemic, the OAA remained silent on the issue of PPE as the profession recognized the urgent need for the medical community and did not want to compound dangerous shortages. The OAA is glad to have taken this position in support of the medical staff and those needing medical or long-term care. Within the profession, there were also many architectural firms supporting the medical community by providing supplies, including 3D printed equipment.

The security of PPE would help the profession to operate more safely in the future. The Commission reported that inspectors stopped on-site inspections in long-term care homes at the start of the pandemic. The OAA witnessed similar measures as municipal building departments suspended on-site building inspections for a number of reasons, including COVID-19 transmission risks, procedural disruptions, and staffing shortages. In some of these instances, municipal building departments attempted to deputize architects to carry out their responsibilities.

Not every architect needed access to a ready supply of PPE, but it is important to recognize some architects were involved in the design and construction of critical health infrastructure (including temporary structures to increase COVID-19 response capacity). It would be prudent to factor in the architectural profession when determining the level of stockpile and provisions required to face future pandemics or crises.

Recommendation #16: Include architects in the PPE count to ensure the profession can safely continue its work—particularly on long-term care and medical infrastructure—during a future pandemic.

MAINTAINING ACCESS TO RESIDENTS

The Commission speaks extensively about the impacts of visitor restrictions on long-term care residents and on the functioning of these homes in general. Indeed, the provincial *Residents' Bill of Rights* requires that residents can “receive visitors of his or her choice...without interference” and, in particular, “[e]very resident who is dying or who is very ill has the right to have family and friends present 24 hours per day.”

The OAA defers to public health and IPAC experts regarding how residents could more safely have maintained access to their loved ones. However, the ability for

families and caregivers to maintain access to residents is important, and safe solutions could have been factored into the design (and design standards) for long-term care homes. The OAA would have to further explore ways to create transitory spaces that could safely maintain this access to loved ones.

Recommendation #17: Consider how transitory spaces can provide continued access to residents during outbreaks and code this into the *Long-Term Care Home Design Manual* if/where appropriate.

BUILDINGS REFLECTED IN PANDEMIC PLANS

Not surprisingly, the Commission continuously stresses the need to be prepared, specifically to have a pre-existing pandemic plan. This is a clear necessity and one the OAA obviously supports. However, the OAA has some concern the Commission may not have incorporated building-specific considerations in these plans. While the Commission applauded homes that “[re]purposed space in the home to create isolation rooms in the event of an outbreak, or used facilities outside the home to isolate sick residents,” there is more to be done here.

The OAA believes building layout and configuration should be considered and clearly articulated in these plans so staff know how to conduct themselves not only in their interactions with patients, but also when assisting residents within the physical space. There should be clear plans articulating to staff how elements or uses of the building need to be reconfigured, repurposed, or augmented (for example, through changes to ventilation). Failure to adequately account for the building itself may continue to expose residents to future risk.

During discussions around the Ontario Health Plan for an Influenza Pandemic (OHPIP), the Commission notes OHPIP included “limited discussion of several items that could have helped the province better respond to a novel threat” including embracing the use of virtual care, and adopting modern communication tools such as videoconferencing. These two elements are excerpted in particular as their implementation may be tied to the design of a facility.

The OAA encourages the consideration of any requirements that create or require a design intervention, such as the better integration of current telecommunications technology, and that these requirements be communicated to the design team, and factored into the facility design, early on. It is critical to identify these requirements early in this period of renewed building and rebuilding of long-term care homes, as it can be far more difficult and costly to add this infrastructure after the fact.

The OAA also noted the Commission’s recommendation for more infectious disease control simulations. While these simulations are understandably geared towards front-line workers, the Ministry should consider whether it may be advantageous for architects to be involved as observers in case there are design-related barriers that need to be identified and changed.

While much of the discussion surrounds building and retrofitting long-term care homes, the Commission also stressed the importance of identifying alternative quarantine and isolation sites in the emergency planning. Architectural expertise would likely be useful in helping to identify and assess the appropriateness of different sites, and we would encourage the Ministry to engage the profession in this important work.



Recommendation #18: Use architectural knowledge and expertise in pandemic preparation planning.

Recommendation #19: Ensure that design is a required consideration for pandemic preparation planning.

Recommendation #20: Ensure any pandemic preparation plans that entail design changes are clearly communicated to the architectural profession.

INTEGRATED HOMES WITHIN EXISTING COMMUNITIES

Participants at the OAA roundtable cautioned against building long-term care homes at the fringes (or beyond) of society—a practice that seems to have arisen from lower land costs and more friendly zoning and planning approvals. The integration of a home within a community—namely the resident's own community—is inherently tied to quality of life. As our roundtable participants put it, “the key to a satisfying life is feeling like you can make a meaningful contribution to it.”

Participants discussed the benefits of locating homes near libraries, community centres, and social and medical supports. Proximity to schools and other very active sites was also viewed as being highly beneficial to residents. Indeed, the long-term care homes could actually be utilized as community hubs. Looking beyond the effects on residents, a disconnected facility can also have negative effects on staff and loved ones who benefit from transit accessibility, places to walk or visit around the home, etc. Socially disconnected sites should be used only as a last resort. To quote the Commission's excerpt from André Picard's recent book: “homes should be an integral part of the community, not hidden away.”

Recommendation #21: Employ Minister's Zoning Orders for long-term care homes until broader changes can be made to expedite the planning approval process.

Recommendation #22: Review planning approvals to broaden the permissibility of long-term care homes in existing communities.

Recommendation #23: Require long-term care homes to be integrated within existing communities as the default.

Recommendation #24: Encourage long-term care homes to be co-located with complementary services and facilities.

LEVERAGING CREATIVITY AND INNOVATION

The Commission's recommendations, building on the former Gillese Inquiry's recommendations, made it clear that leveraging the existing creativity and innovation is critically important to ensuring residents can live safely and with dignity. This is perhaps the best parting comment the OAA can make.



Architects have no shortage of ideas how to improve these spaces. Some of these ideas have already been shared, some have yet to be shared, and others may still need to be further developed or explored. However, this is not a passive activity. To use a colloquial expression, the best time to start was yesterday but the next best time is now.

Architects must be actively engaged immediately so that we do not, as the Commission put it, make the same mistake again by, “building more of the same type of homes that currently dominate the sector.” As previously mentioned, the OAA is collaborating with the University of Toronto and Jacobs to produce a literature review and best practices white paper as it relates to the design of long-term care homes. While this research is taking place, the OAA would be happy to partner with the government to help facilitate and promote direct discussions with practitioners in the field.

Recommendation #25: Create processes that enable the full creativity and innovation of the architectural profession.

AGING-IN-PLACE

Aging-in-place cannot be the entire solution to the long-term care crisis, and overuse could potentially exacerbate other social problems related to housing. However, aging-in-place remains a critical part of the broader solution, and our members deliver innovative solutions on a daily basis including accessibility retrofits to housing up to full reconfigurations of single-family homes to allow for co-living. The allowance of laneway and secondary suites in the City of Toronto is a prime example of creating improved opportunities for aging-in-place.

While the concept of co-living has been around for a long time, there has been a renewed interest in this arrangement, with significant media coverage ramping up over the last few years. The Commission briefly discussed a number of different models, all of which should be carefully studied given the correlation between smaller housing and reduced COVID-19 infection and mortality, the benefits for residents living within integrated communities, individual preferences, and the apparent cost savings for home care versus institutional care.

Recommendation #26: Expand the use of age-in-place, particularly co-living, to help deliver the required capacity in a cost-effective manner.

MANDATORY CHANGES

As exposed by this pandemic, many long-term-care homes have had decades to complete outstanding and necessary repairs but have failed to do so. It is no longer enough to believe that these facilities will naturally come to upgrade their facilities in the necessary timeline. Both the Commission and Auditor General's report argue the Ministry should reassess its licensing process to require home operators to renovate within a realistic, but shortened defined period to comply with current standards and when LTC home design standards change.



Recommendation #27: Set a shorter, defined timeframe for changes, and tie deadlines to phasing out long-term care homes that fail to meet standards.


CONCLUSION

While this submission outlines 27 recommendations, we continue to learn more every day through ongoing discussions with practitioners and partners throughout the industry and academia. We suggest continued discussion and the creation of a working group tasked with quickly identifying and implementing solutions to do justice to the many Ontarians who were so tragically affected by this crisis.

The OAA also recognizes that these recommendations focus on long-term care, but many of them are applicable to *all* congregate living environments. The government should consider and adopt a broader suite of reforms that will reduce risks associated with COVID-19 and future pandemics for all congregate living settings including shelters, group homes, and correctional facilities.

Thank you for allowing me the opportunity to share the architecture profession's recommendations on behalf of the OAA. Please do not hesitate to contact me directly should you have questions, need clarification, or wish to discuss further how we can work with the government to help ensure Ontario's long-term-care homes, existing and future, can better serve the public.

Sincerely,



Susan Speigel, Architect

OAA, FRAIC

President

CC: The Honourable Steve Clark, Minister of Municipal Affairs and Housing

CC: The Honourable Christine Elliott, Minister of Health



Ontario Association
of Architects

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Toronto, ON M3B 3L6
Canada

416-449-6898
oaamail@oaa.on.ca
oaa.on.ca

Appendix A: Resources

- City of Toronto. [*Response to the Second Wave of COVID-19 in City of Toronto Long-Term Care \(LTC\)*](#). April 20, 2021.
- Gettings, Jenna, et al. [*Mask Use and Ventilation Improvements to Reduce COVID-19 Incidence in Elementary Schools — Georgia, November 16–December 11, 2020*](#). Morbidity and Mortality Weekly Report 2021; 70:779–784.
- Government of Ontario. [*Long-term care homes*](#) (Graphs and tables of COVID-19 data for residents and staff living or working in Ontario's long-term care homes).
- Kevin A. Brown. [*Association Between Nursing Home Crowding and COVID-19 Infection and Mortality in Ontario, Canada*](#), *JAMA Internal Medicine*, JAMA Network, February 1, 2021.
- Marr, Linsey, et al. [*FAQs on Protecting Yourself from COVID-19 Aerosol Transmission \(version 1.87\)*](#). December 9, 2020.
- MNP (for the Alberta Department of Health). [*Improving Quality of Life for Residents in Facility-Based Continuing Care*](#). April 30, 2021.
- Office of the Auditor General of Ontario. [*COVID-19 Preparedness and Management Special Report on Pandemic Readiness and Response in Long-Term Care*](#). April, 2021.
- Ontario Association of Architects. [*Member Roundtable: Designing Long-Term Care Homes*](#). April 8, 2021.
- Ontario Association of Architects. [*Misc. Letters to Ministers of Long-Term Care, Municipal Affairs and Housing*](#). 2020-2021.
- Ontario Association of Architects. [*Site Plan Delay Analysis*](#). July 19, 2018.
- Ontario's Long-Term Care COVID-19 Commission. [*Final Report*](#). April 30, 2021.
- Ontario's Long-Term Care COVID-19 Commission. [*Transcripts*](#) (Misc). September 2020-April 2021.
- The SARS Commission. [*Executive Summary*](#). December, 2006.
- Zimmerman, Sheryl, et al. [*Nontraditional Small House Nursing Homes Have Fewer COVID-19 Cases and Deaths*](#). *The Journal of Post Acute and Long-Term Care Medicine (JAMDA)*. January 25, 2021.



Appendix B: The 27 Recommendations

- #1: Increase capital funding for long-term care homes by indexing the Capital Funding Model to annual construction cost data.
- #2: Focus on the long-term cost, not the lowest cost.
- #3: Find the right mix between traditional and P3 procurement.
- #4: Adopt QBS as the procurement method for architecture and engineering services.
- #5: Provincial policy and funding must empower architects to design spaces that rise to the challenge of infection control and increasingly complex medical needs, while maintaining a home-like environment.
- #6: Review findings and work with OAA to integrate best practices into the next iteration of the *Long-Term Care Home Design Manual*.
- #7: Consider making PSWs a regulated profession under the umbrella of an already-established regulator.
- #8: With the exception of a set proportion for couples suites or larger rooms that allow for flexibility, require all long-term care homes to have single-occupancy rooms with individual washrooms containing a shower.
- #9: Update and rapidly deploy a new Long-Term Care Home Design Manual.
- #10: Update the Ontario Building Code and Long-Term Care Home Design Manual to explicitly recognize and address infection control in design, incorporating relevant CSA standards.
- #11: Consider developing a national standard on long-term care design to reduce regional variation and bring together national best practices.
- #12: Reflect the current literature on airborne (specifically aerosol) transmission of COVID-19 in the design and retrofit of long-term care homes.
- #13: Improve ventilation in long-term care to provide clean air, particularly in older facilities.
- #14: The Province should focus significant attention on planning approval reforms, including greater use of as-of-right zoning and expediting the site plan control process.
- #15: While these reforms could be targeted toward long-term care, the Province should recognize that urgent reforms are required for all institutional projects and for building in Ontario more broadly.
- #16: Include architects in the PPE count to ensure the profession can safely continue its work—particularly on long-term care and medical infrastructure—during a future pandemic.
- #17: Consider how transitory spaces can provide continued access to residents during outbreaks and code this into the Long-Term Care Home Design Manual if/where appropriate.
- #18: Use architectural knowledge and expertise in pandemic preparation planning.

- #19: Ensure that design is a required consideration for pandemic preparation planning.
- #20: Ensure any pandemic preparation plans that entail design changes are clearly communicated to the architectural profession.
- #21: Employ Minister's Zoning Orders for long-term care homes until broader changes can be made to expedite the planning approval process.
- #22: Review planning approvals to broaden the permissibility of long-term care homes in existing communities.
- #23: Require long-term care homes to be integrated within existing communities as the default.
- #24: Encourage long-term care homes to be co-located with complementary services and facilities.
- #25: Create processes that enable the full creativity and innovation of the architectural profession.
- #26: Expand the use of age-in-place, particularly co-living, to help deliver the required capacity in a cost-effective manner.
- #27: Set a shorter, defined timeframe for changes, and tie deadlines to phasing out long-term care homes that fail to meet standards.



Memorandum

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 6.4.a

To: OAA Council

Susan Speigel
J. William Birdsell
Barry Cline
Paul Hastings
Natasha Krickhan
Jeffrey Laberge
Agata Mancini
Elaine Mintz
Kristiana Schuhmann
Andrew Thomson

Farida Abu-Bakare
Heather Breeze
Gordon Erskine
Jennifer King
Kathleen Kurtin
Michelle Longlade
Lara J. McKendrick
Deo M. Paquette
Gaganjot Singh
Settimo Vilardi

From: Communications Committee

Jennifer King
Bill Birdsell
Joël León
Arezoo Talebzadeh

Farida Abu-Bakare
Carl Knipfel
Elaine Mintz

Date: November 30, 2021

Subject: Communications Committee Update

Objective: To provide an update on current and ongoing communications-related activities for the OAA.

Highlights

[Conference](#)

[OAA Website](#)

[Awards](#)

[E-Communications](#)

[Podcasts](#)

[Social Media](#)

On November 15, the OAA Communications Committee met virtually with OAA staff for their usual updates, reports, and further planning, along with specific tasks to discuss Council's requested direction on the previous memos related to OAA Awards, as well as discuss the OAA's forthcoming podcast program and make important selections related to juries for the 2022 OAA Design Excellence and Service Awards program as well as the keynote prior to next year's Conference.

Additionally, the VP Communications continues to be involved in Conference-related meetings with the SVP, President, VP Education, and staff. She also met with OAA staff as part of continued discussions regarding the further development of podcast programming.

The next Communications Committee meeting is set for early January, where the group will discuss the call for tours at Conference as well as possibilities for the addition of plaques to the Design Excellence Awards. After this, the next meeting is expected to take place virtually in late February and include discussion on the Public Awareness Sponsorship and Special Project Funding requests.

Conference

The OAA shared its call for education sessions on the website, social media, and with various industry associations and organizations to elicit proposals for technical seminars.

A call for tours went out in November, with a deadline open until mid-December. Staff are also in talks with MCC regarding possible excursions for Conference in Toronto this May, as well as how technical tours of the OAA Headquarters would develop.

At the November meeting, OAA Staff shared a shortlist of possible keynote speakers for the committee's review and consideration. Together with staff, the committee reviewed and discussed the merits of each candidate, many of whom were suggested by Council and Committee members, and ultimately selected its recommendation.

That choice, included in a separate Council memo, found great consensus, especially given the theme of "Inspiring Climate Action." Should Council agree with the motion, staff will finalize details with the speakers' bureau. The keynote would be virtual and likely take place on the Tuesday or Wednesday after March Break to kick off registration for the in-person and virtual Conference.

While the format of the Plenary (in-person at Conference, but also live-streamed) continues, OAA staff have been in contact with speakers' bureaus to determine availability of various experts in the realm of climate stability.

OAA Website

Many changes and refinements have continued on the OAA Website over the last several months. The following sections have been launched and are now live on the OAA Website:

- A new integrated form for sponsorship requests;
- OAA's Council Policy documents in the Documents and Publications portal;
- [Indigenous Architecture](#) and [Equity, Diversity, and Inclusion \(EDI\)](#) portals collecting OAA initiatives, publications, and resources; and
- Launch of Elections candidate module to assist with the management and display of OAA Council candidate information.

Work is also underway on the following additions to the Website which will be launched in the coming months:

- A new OAA Contracts page to make it easier for the public and architectural professionals to find the contract they are looking for.
- Design competitions and other information pages related to finding and working with members of the architecture profession;
- A listing of scholarships under the Access to Architecture page;
- A list of grants and financial incentives for the Climate Stability page;
- A page looking at the OAA's work with building officials and municipalities from a public interest perspective; and
- Additional pages and revisions being planned in concert with Practice Advisory Services and the Office of the Registrar.

Web Updates (October–November 2021)

- 2022 OAA Awards/Call for Entries updates
- Equity, Diversity and Inclusion page launch
- Indigenous Architecture page launch
- Election updates/Candidate module launch
- OAA ConEd Webinar Series updates
- bOAAg – Queens Park Picks and Sponsored Sessions from Conference
- TEUI/CSA Standards reporting

Upcoming Priorities

- New Contract page updates
- Creation of Design competitions information page
- Accessibility training

OAA Awards

The Committee continues to examine minor adjustments to improve clarity, fairness, transparency, and inclusion, with a memo expected to Council in early 2022. Again, given the extensive work done by a consultant and a previous OAA Steering Committee, the goal is to slightly refine or improve, rather than substantially change, any aspect of the awards program.

The Committee has drafted a policy for new awards and related donations, based on discussions at previous Communications Committee meetings earlier this year and Council direction. It is provided under separate cover for Council's consideration.

Staff provided jury selection updates and shared the 16 recommendations received from Council and the Communications Committee. This year, jury selection criteria was expanded to allow greater representation in jurors, including professional experience level.

Together with staff, Committee reviewed jury candidates for both the Design Excellence Awards and the Service Awards. A shortlist was reached (along with backups for specific individuals to ensure diversity), and staff will begin reaching out to candidates regarding availability. The OAA's Conflict of Interest Policy will also be shared.

Jury Day will be taking place as a virtual event on February 17 and will include the review and consideration of Design Excellence and Service Award nominees and entries. This will be preceded by a Sustainability Jury Day where two members of the OAA's Sustainable Built Environments Committee (SBEC) will review all Design Excellence submissions to ensure the mandatory Energy Use Intensity (EUI) data has been correctly included.

The call for submissions was launched in the fall and will be open until mid-January. Staff continue to answer questions from members and ensure the digital submission site functions as intended. As a reminder, the coming slate comprises not only Design Excellence (including People's Choice Award, Michael V. and Wanda Plachta Award, and Lieutenant Governor's Award for Design Excellence in Architecture) and Lifetime Design Achievement Award, but also Best Emerging Practice, G. Randy Roberts Service Award, Honour Roll, and Order of da Vinci.

Both SHIFT webinars were held in November and were deemed a major succession with approximately 600 people attending each. The events featured the five submissions (three on November 16 and two on November 30) in moderated discussion by Azure Magazine editor Stefan Novakovic and DTAH architect Joe Lobko, respectively. The free, publicly accessible events, held over Zoom Webinar and produced with MCC, offered Continuing Education hours to licensed professionals and were recorded. They will soon be available on the OAA YouTube page. The year's final OAA News will link to them, as well as the the SHIFT2021 Resiliency/Architecture Challenge digital book, by editor Adele Weder and *Canadian Architect's* design team.

Next year, the Committee will review the success of the SHIFT program, taking into account suggestions made by past jury facilitator (and part of the initial Working Group), Toon Dreessen.

E-communications

In addition to the regular biweekly editions of the *OAA News* newsletter and the bimonthly *Practice Advisory*, numerous other "special bulletin" emails have been sent out since the last Council report. These include:

- Encouragement to participate in the OAA's mentorship experience survey;
- OAA and OGCA release of Recommended Supplementary Conditions for new CCDC 2-2020;
- Reminder to register for the SHIFT webinars;
- A Message from the President: Fair Treatment for Architecture Interns and Students;
- Reminder of the ability to sign up for free access to code-referenced CSA standards; and
- Separate Calls for Tours, Awards, and Educational Sessions.

Podcasts

OAA Staff member, Romy Poletti, joined the Committee's November 15 meeting to provide updates on OAA Podcast pilot project.

An RFP (following quality-based selection process) has been created and a budget has been allocated. This RFP was shared with the Committee to provide feedback before being included in this report as an information-only **Appendix 1**. The RFP is expected to be shared shortly after the Council meeting and then a qualifications-based selection (QBS) system will be followed early in the new year to develop a short list to share with the Committee.

The RFP seeks a consultant to assist with the technical production (recording, editing, uploading, disseminating, SEO, etc), as well as collaborating with OAA staff and Committee members on developing and launching a pilot season that will be six 30-minute episodes focusing on evergreen topics to maintain relevance over time. The intended audience is the OAA membership, as well as others in the design/construction sphere including the general public. Staff will work with a podcast production company, to create both audio and visual formats. The podcast is set to be launched in 2022, possibly alongside Conference.

Social Media

As shown below, all social channels showed growth, especially Instagram, as per usual. Information related to the Long-Term Care Recommendations from the OAA were shared on all channels, as well as reminders to participate in the OAA Council elections.

On **Instagram** and **Facebook**, posts and stories were used to share individual stories that appeared in *OAA News*, calls for entries and presenters for awards and the Conference, Council election information, the OAA Continuing Education Webinar series, and invitations to the SHIFT webinars, as well as striving for content on equity, diversity, and inclusion, along with congregate living.

Twitter was used to inform followers about Council meetings and the election process, career/volunteer opportunities, news, events (like Meet the OAA), and COVID-19 updates. Many events were also retweeted from sources such as the City of Toronto, Toronto Society of Architects, RAIC, *Canadian Architect*, *Building*, and *Architect*.

LinkedIn was used to share practice- and public-facing items, including SHIFT, elections, the latest edition of *Practice Advisory*, and calls for presenters and awards submissions.

Work is also underway to find new opportunities to share information about the OAA Headquarters, in the context of the ensuring existing buildings can be improved with respect to climate stability, on all channels of social media.

The **Social Media Content Amplification Activity (Appendix 2)** provides a brief overview of some of the content that has been shared since the last Council meeting, alongside audience data for reach, engagement, and impressions. To keep it concise, it focuses specifically on major OAA initiatives, as well as congregate living and Equity, Diversity, and Inclusion, over that period.



Followers: 6,804 (**up 45 from last report**)
Average Post Audience: 4,451



Followers: 7,737 (**up 18 from last report**)
Total Likes: 7,353 (37 up from last report)



Followers: 2,379 (**up 15 from last report**)
Total Likes: 1,996 (5 up from 1,991)



Followers: 8,757 (**up 76 from last report**)
Post Impressions: 6,300

Action: For information only.

Attachments: PodcastPDF.pdf, OAA Content Activity Chart Nov. 2021.pdf



REQUEST FOR PROPOSALS

OAA Podcast Production Consultant

December 10, 2021

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Request for Proposal

OAA Podcast Production Consultant: Ontario Association of Architects

I. Background Information

The [Ontario Association of Architects \(OAA\)](#) is planning to create and produce a podcast as an additional mode of communication to reach an audience comprising its members (the province's architecture profession and those on the path to licensure), architecture enthusiasts, and the general public.

The OAA is the licensing body and professional association for Ontario's architects. Established under the *Architects Act*, its principal object is to regulate the practice of architecture "... in order that the public interest may be served and protected."

In keeping with the OAA's procurement policy, an RFP process is being conducted in order to select and engage an appropriate consultant to assist the OAA in producing a podcast. The OAA champions a [Qualifications-Based Selection](#) process when selecting outside consultants.

This is the first podcast produced by the OAA and is supported by the OAA's governing Council.

In response to the COVID-19 pandemic, OAA operations are currently being conducted remotely. Any meetings, discussion, or collaboration take place remotely through Zoom or a similar platform.

II. Project Description and Objective

The OAA is accepting applications from qualified consultants (individuals or companies) to work closely with OAA Communications Staff and/or the Communications Committee (led by the VP Communications) to facilitate the development and production of the inaugural OAA podcast series.

The planned podcast series would comprise both simultaneous audio and video recordings of six episodes in season one that will focus on topics pertaining to the profession of architecture that aim to promote and increase the knowledge, skill, and proficiency of its members; to inspire architectural professionals at all stages of their careers; and for the general public who may have interest in architecture.

The OAA is seeking a podcast consultant (whether an individual or a team) to assist with producing season one, in anticipation of producing more should the first season be successful. Season one of the OAA podcast will include the pre- and post-production of six podcast episodes, each approximately 30 minutes in length. At this time, these six topics are anticipated to include episodes related to the topics of:

- Climate change;
- Issues related to equity, diversity, and inclusion (EDI) as well as Truth and Reconciliation;
- Topics related to practising architecture, including the relationship between clients and the profession;

- The role of design in improving long-term care and other congregative projects post-COVID; and/or
- Work/life balance and wellness topics
- Pathways to entering the profession

The current thought is the OAA will identify a host (consistent), with varying guest(s) specializing in a topic listed, for each episode. At this time, the feeling is the podcast will be recorded remotely via a video conference platform such as Zoom, though a live recording at an event like Conference may be feasible. The podcast will then need to be produced into an audio format for podcast platforms, as well as a concurrent video podcast published on a platform such as YouTube.

In addition to assisting with the technical production of the podcast, the Consultant will also collaborate with OAA Staff and Committee members on developing and launching this pilot podcast season.

The in-house OAA Communications team will be responsible for the branding and design elements required for the podcast.

Project Outline:

- Review the Communications strategic plan to understand OAA's mandate and goals ahead of helping to produce a podcast.
- Facilitate strategic podcast planning sessions with OAA Staff and VP Communications to help in creating an effective podcast.
- Assist in pre-production and collaborate with OAA Staff in creating schedules/timelines; recommending professional recording equipment; selecting intro/outro music and licensing; scheduling; and finalizing consent agreements with guests/interviewees.
- Develop processes for recording podcast sessions.
- Record remote podcast sessions (both audio and video).
- Undertake post-production responsibilities such as editing; distribution through audio podcast channels; providing written transcript for each episode; SEO promotion; closed/open captioning for the video podcast.
- Help create success measurements/protocols to determine the efficacy of the OAA podcast season one as a Communications tool.

III. Final Deliverable

The final deliverable will include:

1. Develop a timeline/plan based on the initial meeting(s) with OAA Staff and Communications Committee.
2. Pre- and post-production of six podcasts episodes, both audio and video recordings (approximately 30 minutes each) including distribution and promotion (via podcast channels).
3. Final report demonstrating success measurements and/or protocols to determine the efficacy of the podcast as a Communications tool.

IV. Schedule and Timeline

The proposed project timeline is February–December 2022*

- December 13, 2021 RFP released
- January 31, 2022 Final deadline for submission of RFP
- February 2022 OAA review and shortlisting of applicants
- March 2022 Project commencement
- March-May 2022 Pre-production of podcast season one
- May 2022 Record Episodes 1 & 2
- June 2022 Record Episodes 3 & 4
- September 2022 Record Episodes 5 & 6
- December 2022 Final report due

**Timeline is subject to change. While timelines may change, the intention is for the first season of the podcast (all 6 episodes) to be released by December 2022.*

V. Assumptions

Acceptance of the selected proponent is contingent on the successful negotiation of the conditions of this agreement and scope of service.

The OAA reserves the right to accept or reject any or all responses to this RFP, as well as to reissue the RFP.

The OAA is not responsible for any costs incurred by the applicant in preparation of this proposal.

In case of disagreement in the interpretation of the provisions of this RFP, the final decision will rest with the OAA.

All proposal materials submitted for this RFP will remain property of the OAA.

All deliverables resulting from this RFP will remain property of the OAA, and their use thereafter is at the discretion of the OAA

All information concerning the OAA gathered by potential bidders during the RFP process is confidential and remains the property of the OAA.

VI. Submission Deadlines and Requirements

The proposal should include:

1. Consultant Profile
2. Qualifications and Experience
3. Service Process Overview
4. References

The deadline for submissions is **January 31, 2022**.

Please send submissions, or questions for additional information or clarification, to:

Ontario Association of Architects
c/o Erik Missio, Communications Manager
ErikM@oaa.on.ca
Subject: OAA Podcast Production Consultant

VII. Basis for Award of Contract

The Qualifications-Based Selection (QBS) method will be used to select the successful applicant. As recommended by the OAA, QBS is a fair and objective process that facilitates the selection of an applicant on the basis of value-based criteria and competence, including consideration of professional qualifications, creativity, and availability, in relation to the scope of work and needs of the client. Following the selection of the applicant on this basis, the scope of service and professional fees are determined. Once agreed upon by the applicant and the client, the contract is awarded.

Applicants will be short-listed based on the recommendations of the OAA's Selection Committee who will apply the QBS method when considering each application.









The preferred applicant will be identified following an interview with each of those short-listed. At this point, the OAA's Selection Committee will engage in a scope and fee negotiation. If the negotiations fail to achieve agreement in regard to the fee and scope of work, the process will proceed to the next short-listed proponent in order to negotiate the acceptable fee and scope of work. If not successful, the process will continue to repeat until an agreeable contract can be negotiated.

The OAA also reserves the right to accept or reject any or all responses to this RFP, as well as to reissue the RFP.









Ontario Association of Architects (OAA)

Founded in 1889, the OAA is a self-regulating, not-for-profit organization that is governed by the Architects Act, a statute of the Government of Ontario. Established under the Act, its principal object is to regulate the practice of architecture "... in order that the public interest may be served and protected." The Association is dedicated to promoting and increasing the knowledge, skill, and proficiency of its members, and administering the Architects Act.







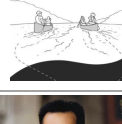

OAA Content Amplification Activity (October 22 -November 26, 2021)






					Multi-platform strategy: Published on OAA			Membership / Public Engagement #s					
					Platform			Instagram		Facebook		Twitter	
Title:	Posted on:	Title:	Image	Source:	Instagram	Twitter	Facebook	Reach	Likes	Reach	Likes	Impression	Likes
OAA/Architecture News	23-Nov-21	Message from the OAA President		OAA	✓	✓	✓	1967	105	121		5 623	7
	16-Nov	Call for Tours 2022		OAA	✓	✓	✓	436	7	136		0 184	1
	09-Nov	Despite recent price hikes, heating with gas is still so cheap it's going to be hard to kick the habit.		CBC News	✓	✓	✓	847	24	196	2	373	3
	03-Nov	SHIFT2021 Webinar		OAA	✓	✓	✓	2264	118	175	1	1364	8
Equity, Diversity, & Inclusion	10-Nov	East-West Connection.		Canadian Architect	✓	✓	✓	1114	65	243	2	199	3
	05-Nov	During #TreatiesRecognitionWeek		OAA	✓	✓	✓	473	23	213	1	313	3
	01-Nov	Launching New Pages Related to Equity, Diversity, and Inclusion.		OAA	✓	✓	✓	420	20	116	0	164	1
Equity, Diversity, & Inclusion	26-Oct	Peguis Selkirk Treaty Monument Request for Qualifications.		OAA	✓	✓		350	11	141	1	n/a	n/a

OAA Content Amplification Activity (September 9 - October 22, 2021)

					Multi-platform strategy: Published on OAA Platform									Membership / Public Engagement #'s			
Title: OAA/Architecture News	Posted on:	Title:	Image	Source:	Platform			Instagram		Facebook		Twitter		Impression		Likes	
					Instagram	Twitter	Facebook	Reach	Likes	Reach	Likes	Impression	Likes	Impression	Likes	Impression	Likes
OAA/Architecture News	21-Oct-21	2022 OAA Awards - Call for Entries		OAA	✓	✓	✓	609	13	141		1	161				0
	04-Oct	2021 Queen's Park Picks		OAA	✓	✓	✓	743	24	1078		34	11867				19
	23-Sep	These two are Toronto's laneway housing pioneers.		Toronto Life				3240	215	349		7	203				4
	13-Sep	Book Excerpt: Canadian Architecture—Evolving a Cultural Identity.		Canadian Architect	✓	✓	✓	2484	160	298		7	254				4
Equity, Diversity, & Inclusion	01-Oct	Society of South Asian Architects, Canada (SOSA)		SOSA	✓			943	57								
	30-Sep	National Day for Truth and Reconciliation		OAA	✓	✓	✓	807	48	127		5	549				7
	30-Sep	Truth and Reconciliation Environmental Scan Final Report		OAA	✓	✓	✓	581	31	174		1	277				2
Equity, Diversity, & Inclusion	20-Sep	Seeking Persons with Disabilities for Board Positions.		OAA	✓	✓	✓	61	14	156		1	296				1

OAA Content Amplification Activity (Feb 23 - September 9, 2021)

					Multi-platform strategy: Published on OAA			Membership / Public Engagement #'s						
					Platform			Instagram		Facebook		Twitter		
Title:	Posted on:	Title:	Image	Source:	Instagram	Twitter	Facebook	Reach	Likes	Reach	Likes	Impression	Likes	
OAA/Architecture News	Sept. 8	OAA Committee Vacancies		OAA	✓	✓	✓	649	16	155	3	145	0	
	25-Aug	2021 OAA Society Tours		OAA	✓	✓	✓	704	22	234	3	298	0	
	04-Aug	Toronto Pools by Bianca Weeko Martin		OAA				1693	107	390	12	408	2	
	02-Jul	Laurentian University's McEwen School of Architecture		The Sudbury Star	✓	✓	✓	2531	180	360	110	1489	9	
Equity, Diversity, & Inclusion	28-Jun	Educating others about the built environment drives Mancini		DCN	✓	✓	✓	1404	55	228	5	Repost	Repost	
	22-Jun	Douglas Cardinal - Architect of the Future		4 Seasons of Reconciliation				2431	115	164	0	439	4	
	21-Jun	#IndigenousPeoplesDay in Canada, part of #NIHM2021		OAA	✓	✓	✓	1029	50	248	5	2063	7	
Equity, Diversity, & Inclusion	17-Jun	David Wang: The Long Echo of Racism		Architect	✓	✓	✓	1054	40	208	3	648	4	

					Multi-platform strategy: Published on OAA Platform								
					Membership / Public Engagement #'s								
								Instagram		Facebook		Twitter	
Title:	Posted on:	Title:	Image	Source:	Instagram	Twitter	Facebook	Reach	Likes	Reach	Likes	Impression	Likes
Equity, Diversity, & Inclusion	June. 10	TSA Exchange: Inclusion in Construction		TSA	✓	✓	✓	920	40	129	1	334	0
	June. 10	TSA IDEAS Forum: Queer Space		TSA	✓	✓	✓	910	32	217	3	664	8
	June. 3	"Understanding & Minimizing Unconscious Bias in the Hiring Process."		OAA	✓	✓	✓	591	10	113	1	1,054	4
	June. 3	BEAT National		BEAT National	✓	✓	✓	576	17	108	1	556	2
Congregate Living	May. 24	Design Recovery: Strategic Resilience for the Next Normal		OAA	✓	✓	✓	657	18	106	0	453	4
	May. 24	Disconnected: A Collaboration Session Discussing Remote Teams & Clients		OAA	✓	✓	✓	756	27	97	0	592	8
	May. 23	Inclusive Design/Exclusive Design: Creating Public Spaces for All		OAA	✓	✓	✓	673	34	88	0	396	4
Equity, Diversity, & Inclusion	May 22	Many Voices in Harmony: Indigenous Storytelling through Architecture and the Allied Arts		OAA	✓	✓	✓	571	24	107	0	428	2

Memorandum

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 6.5.a

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Paul Hastings Vice President Regulatory, Christie Mills Registrar

Date: November 26, 2021

Subject: Activities Under the Registrar Oct 20, 2021–Nov 24, 2021

Objective: Statistical Update

Experience Requirements Committee (ERC): There were no ERC interviews undertaken during this period. There is one more upcoming interview for this year; date planned for December 7, 2021. Interviews are fully remote via Zoom hosted by Arbitration Place.

Complaints Committee: There are currently two active complaints, their disposition will be determined in the next scheduled Complaints Committee meeting. There are four matters at the intake stage, meaning formal complaints have yet to be filed. One complaint is being held in abeyance. On November 9, 2021, 45 non-compliant members were provided with an extension to meet their outstanding Con-Ed requirements for the 2018-20 cycle. Subsequently, by way of motion, the following was decided:

- 15 members (now compliant, 1st time late) were issued a Caution
- 5 members (now compliant, 2nd time late) were issued an Undertaking
- 25 members (still noncompliant) were referred to the Discipline Committee

Public Interest Review Committee (PIRC): No meetings during this period.

Discipline Committee: There are four ongoing Discipline matters. One hearing is scheduled for December 1, 2021, the remaining to be scheduled in the new

year. Outstanding hearings will move forward using the virtual platform if it is agreeable to all parties.

Registration Committee: There were no Registration Committee hearings during this period.

Act Enforcement: Three new matters were received during this period related to misuse of the term “Architect” or “Architecture” or otherwise holding out. This brings the total to 104 act enforcement matters thus far for 2021. Three Registrar’s Investigations are ongoing.

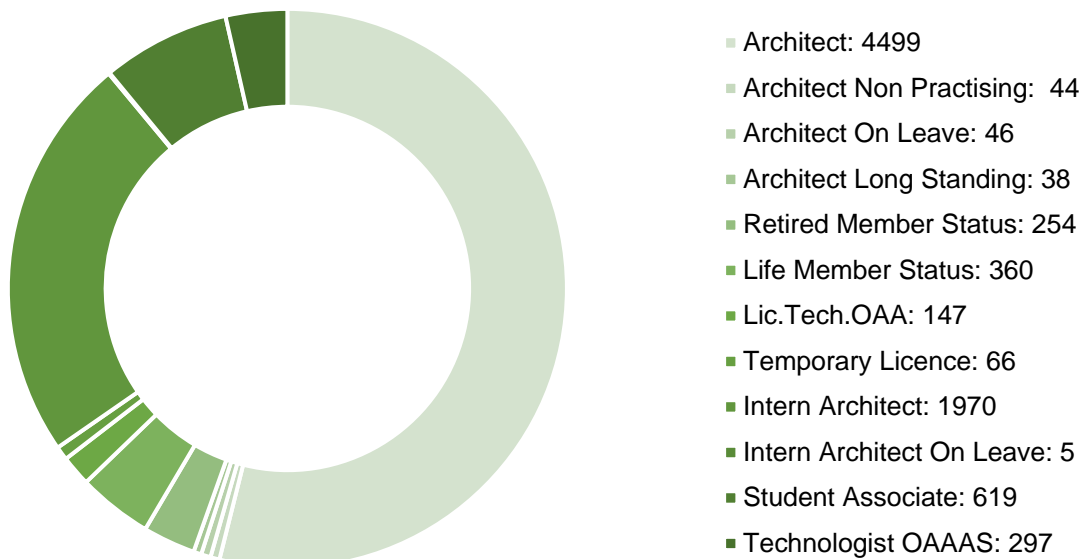
Injunction: There are no injunctions in process related to holding out and unauthorized practice.

Action: **None. For Information Only.**

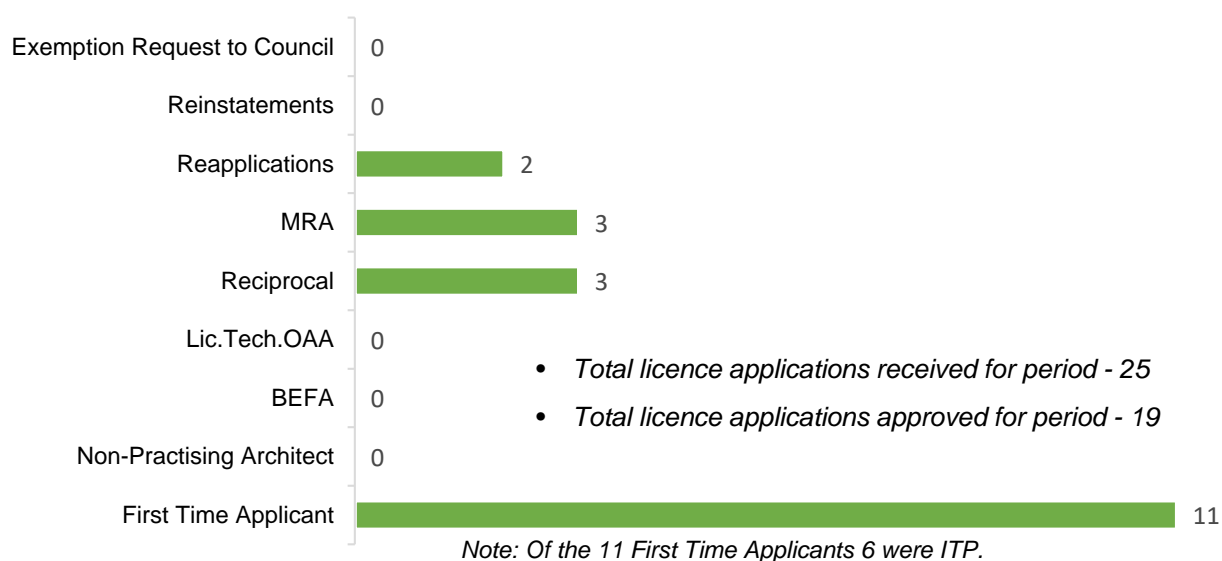
Attachments: Activities Under the Registrar Statistical Report

OAA Community as of November 24, 2021

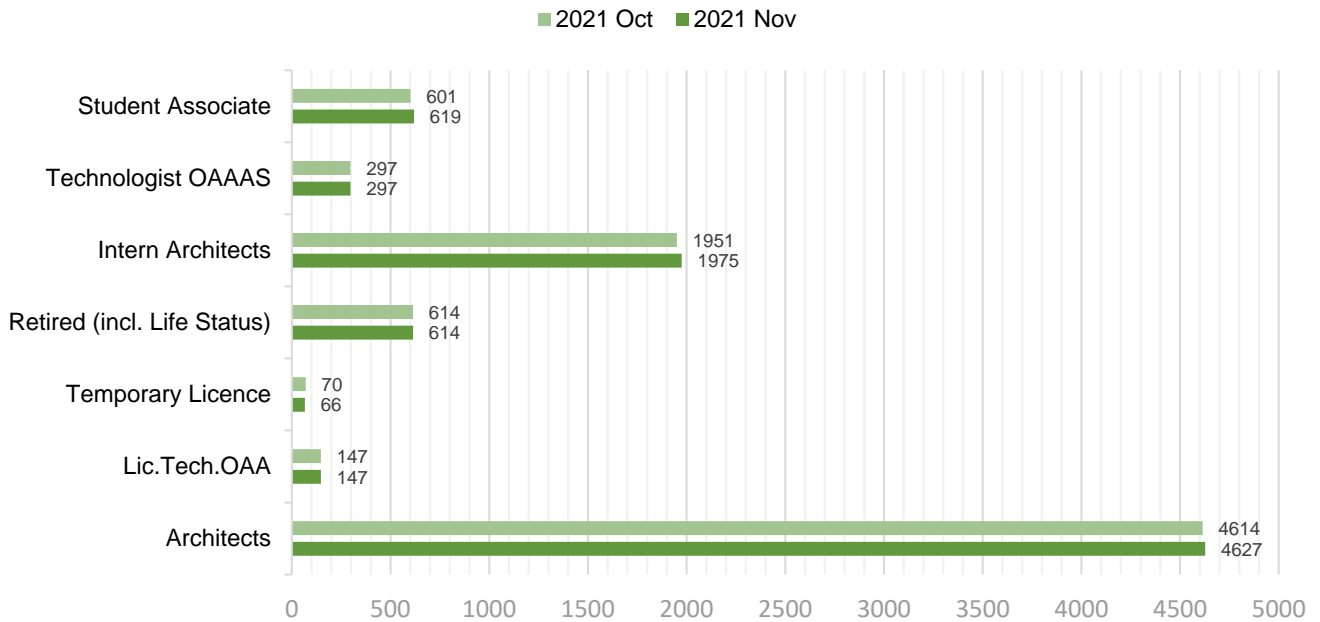
OAA Individual Status Distribution



Licence Application Approval Distribution for period Oct 21, 2021 – Nov 24, 2021



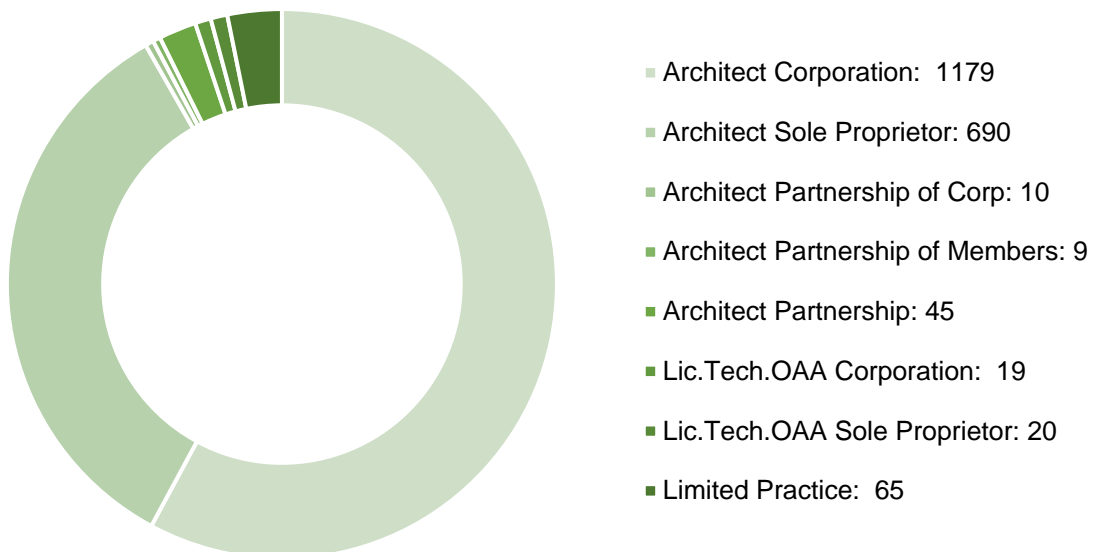
Growth in Individual Status for period Oct 21, 2021 – Nov 24, 2021



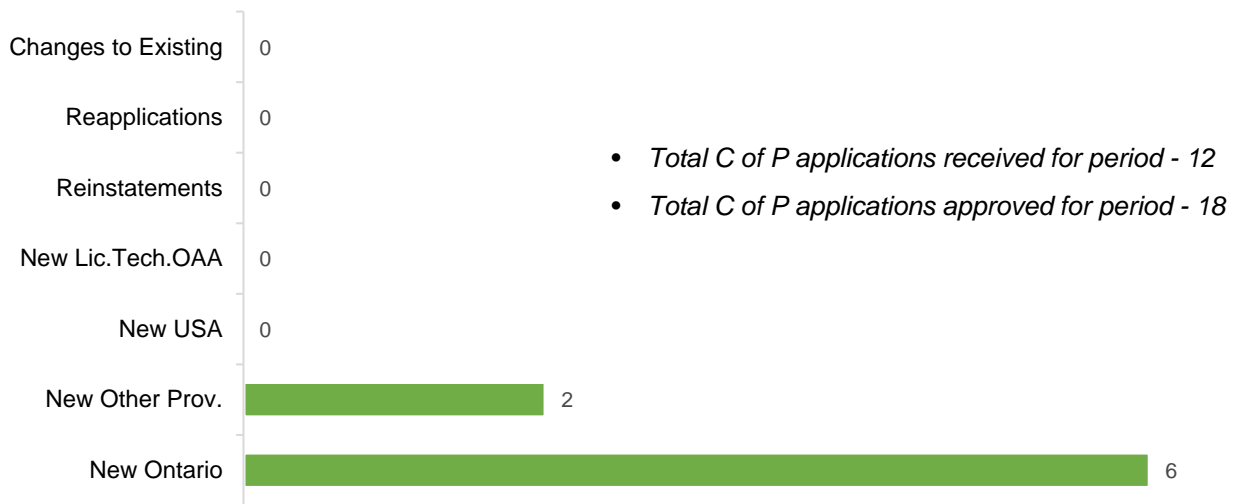
- *Total Intern Architect Applications Received for the period - 39*
- *Total Student Associate Applications Received for the period - 21*

Certificate of Practice as of November 24, 2021

OAA Certificate of Practice Distribution

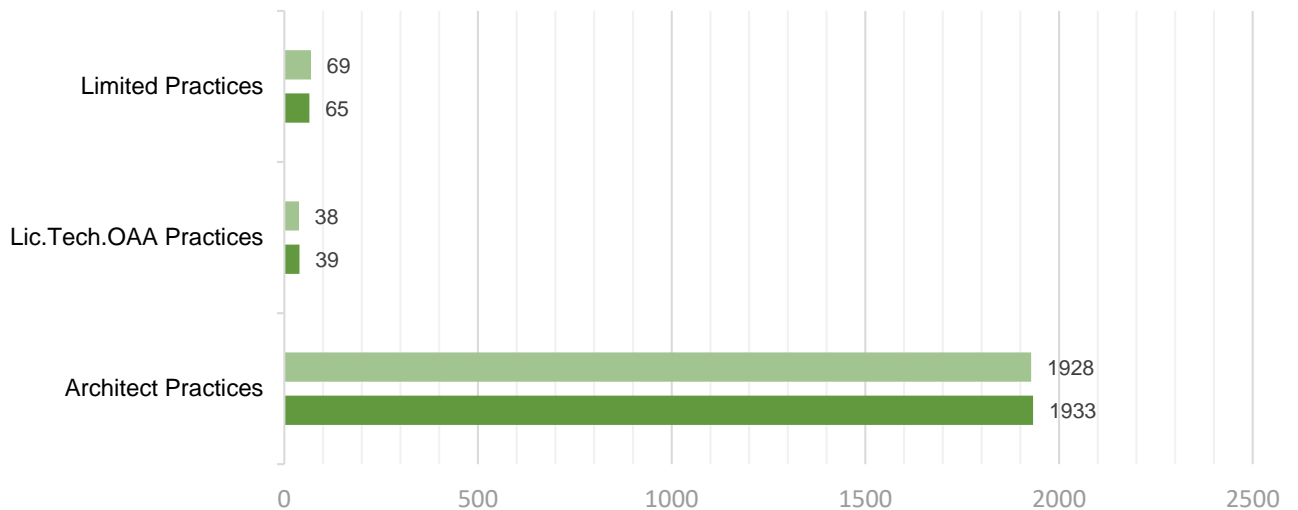


Practice Application Approval Distribution period Oct 21, 2021 – Nov 24, 2021



Growth in Certificate of Practice period Oct 21, 2021 – Nov 24, 2021

■ 2021 Oct ■ 2021 Nov



Memorandum

To: Council

FOR COUNCIL MEETING

December 10, 2021

(open)

ITEM: 6.6.a

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Barry Cline	Gordon Erskine
Paul Hastings	Jennifer King
Natasha Krickhan	Kathleen Kurtin
Jeffrey Laberge	Michelle Longlade
Agata Mancini	Lara J. McKendrick
Elaine Mintz	Deo M. Paquette
Kristiana Schuhmann	Gaganjot Singh
Andrew Thomson	Settimo Vilardi

From: Settimo Vilardi, Vice President Practice

Date: November 25, 2021

Subject: Report from Vice President Practice

Objective: To update Council on activities of the Practice Portfolio.

Activities Report – Vice President Practice (since last Council meeting in November)

- CALA Fall 2021 Regulators Meeting: November 5, 2021
- Interviews for Strategic Planning Consultants: November 8-9, 12, 2021
- OAA Strategic Planning Meeting: November 29, 2021
- Pro-Demnity Board, Committee & Special Meetings: November 27, 2021
- OAA PRC Meetings: November 11, 2021
- OAA PACT Meeting: December 2, 2021
- OAA SCOB CAR Meeting: October 21, November 9, November 16, November 23, November 30, 2021
- OAA President's Society Meeting – Windsor/London: November 17, 2021
- Society Chairs Meeting: December 7, 2021 OAA Executive Committee Meeting: November 24, 2021
- VPM – City of Ottawa: November 26, 2021
- RIBA – Fee Calculator Demonstration: November 2, 2021
- Interviews for PRC and SCOB CAR Committees 2022: Various dates
- MMAH Session related to Fall Consultation: November 25 and November 23 (partial)

Activities Report – COVID-19 Webpage:

Latest updates to [webpage](#) reflect the current status of the Province being in Stage 3 of the Roadmap to Reopen.

The latest issue to come to the forefront is Mandatory Vaccination Policies. PAS has been tracking the topic. This was also discussed at Practice Resource Committee and also in the latest edition of the [Practice Advisory E-newsletter](#) issued earlier this month.

The applicable law is in flux. The best guidance that can be given to all members is to seek legal advice about their particular circumstances. What is permissible or required may vary by municipality, by health unit and by client (federal, provincial, private sector). The OAA continues to monitor the situation and intends to add some next content on the COVID-19 webpage in the upcoming weeks.

Activities Report – Practice Advisory Services (Key Items)

OAA Hotline: As of October 16, PAS received about 1450 calls since beginning of 2021 (about 160 between October 16, 2021 to November 19, 2021). (Note: This may include multiple calls about the same topic). This does not include email correspondence.

Update on Requests for Proposals (RFPs) monitoring:

0 RFP alert has been issued since Council last met in November 2021. The number of requests for RFP review has fallen recently. This may only be a seasonal variation. PAS's ability to respond to RFP review requests has been reduced by other staff commitments and the unfilled vacant positions.

Update to OAA Contracts:

At the September Council meeting, the new OAA 600-2021 Contract was endorsed. PAS is working on finalizing a few graphical items and minor content changes (grammar and typographical errors, and moral rights wording) prior to working on the editable format that will be posted on website very soon.

The team is also working on:

- OAA 900–2021: Draft complete and sent to legal. Meeting with legal occurred week of November 22 to review initial comments as it pertains to this flow through subconsultant contract.
- OAA 800–2021: There was engaging discussion at the PRC meeting on October 14 to discuss what content is necessary to be included. The discussion will help to start the draft based on the OAA 600 copy that was endorsed in September. Pro-Demnity reminded PRC that a guiding principle in the previous version was “if it is established by applicable law, the contract should be silent about it.” The PRC further noted that

the document is in wide use, needs to be kept as short as possible and should be retained.

- New Contract Landing page: As previously reported, PAS is working with Communications group to create new Contract Landing page and related webpages to support the launch of the new OAA 2021 Contract Suite.

CSA Subscription – Update:

The OAA announced it had [secured access to critical CSA standards](#) for Ontario's practices and licensed members through the CSA OnDemand program on June 1. Practice Advisory Services area continues to work with OAA Communications to provide reminders to members about the program. A standalone email was sent to the members on November 18, 2021 to remind members of the program. December 1 will be half year mark of the program's existence. PAS will provide more detailed statistics in the New Year. SCOB CAR has been using the access extensively for a project being undertaken by the Committee. They have identified some missing standards that were communicated to and then provided by CSA.

Professional Fees & Discussion re. Various Strategies (Follow-up to December 2020 Council Meeting):

PAS arranged a demo with [RIBA](#) about their tool on November 2nd. Attendees included:

- RIBA's Director of Knowledge Partnerships – Stephen Cross
- OAA President – Susan Spiegel
- VP Practice – Settimo Vilardi
- OAA's Executive Director – Kristi Doyle
- PAS Manager – Melisa Audet
- Practice Advisor – Allen Humphries

As the Council is aware, looking at a web application/tool was identified as a strategy in assisting the membership as well as the public in this area. Since the OAA was aware that RIBA had developed this tool the OAA thought it prudent to investigate further to gain information on its inception, development and costs.

During the hour-long virtual meeting, RIBA presented a demo of their online tool. Here are key points to share with Council:

- RIBA advised the cost of developing the tool was in the 6 figure range (actual amount was not disclosed) and took about 2 years to develop. The intent is to add additional features over time including other project management related features, project timeline, etc

- Cost: Members must pay for this service yearly and users have different access levels for information privacy within the practice. There are about 3800 practices within RIBA and about 1000 have signed up to date.
- IT: RIBA rents space on a server farm to run the tool. The information is encrypted.
- Maintenance of the tool requires about 3 staff: Project Manager, Communication Specialist and a User Interface designer
- There is an Education program (lunch and learn) as part of the tool.
- RIBA had an accountant review the tool's functionality. It was noted that quality of the fees estimate the tool outputs depends on the quality of the data input by the user. The tool considers overhead as part of the overall project cost.
- The tool aligns with RIBA's "Stages of work" (similar to our phases : programming, SD, DD, CD, etc)
- Users can download the resultant data file into an Excel file for use off-line.
- RIBA are looking at how the fee tool could start importing data into their digital contract forms.
- The tool is also being used as a data base for collecting information on fees to better inform the membership and update further iterations of the tool

It should be noted that without a basic understanding of overhead expenses hourly rates, profitability, risk management, etc the quality of the fee information outputted by the tool will be negatively affected.

VP Practice and PAS will continue to work on shortlist of fee related resources and information, for both the public and membership, on architectural fees and collect these on a standalone fees landing page providing a concentrated resource for this information. First starting with information/resources the OAA has already available and then expanding on additional content, either new or from related resources

VP Practice Vilardi was secured as a Subject Matter Expert (SME) by the Fundamentals of Running and Architectural Practice (FRAP) Course to prepare a module for "Determining Reasonable Fees". This is nearly complete and should be available through the course early in 2022. Since the FRAP Course is being converted to a self-guided online course through the U of T School of Continuing Studies it may have greater accessibility to the membership as the course may be available, as a separate course, to membership.

A report to follow in the new year with proposed initiatives.

Fall Consultation: The Next Edition of Ontario's Building Code (MMAH)

On October 20, the Ministry of Municipal Affairs and Housing (MMAH) launched public consultation on proposed changes for the next edition of Ontario's Building Code, which continues the process of increased harmonization with the National Construction Code.

Currently, proposed code changes are posted on the [Regulatory Registry](#) for comment until December 4, 2021. These include existing technical variations between the provincial and national codes, Ontario-only changes, and low-impact technical variations unrelated to harmonization.

The OAA has shared this information with the membership via OAA news and Practice Advisory and the Sub-Committee on Building Codes and Regulations (SCOBCAR) has mobilized to examine these revisions via multiple meetings since the start of the month. SBEC was asked to review a few key changes located in Part 9 and Part 12 SCOBCAR awaits their feedback.

OAA requested an extension to the deadline due to the quantity of proposed changes to review. The final submission will include a cover letter as well as the tables to summarized comments of SCOBCAR Committee.

Key members of the executive alongside staff attended two information session hosted by MMAH on November 23 (Large Buildings) and November 25 (Small Buildings). MMAH gave some background on the harmonization efforts happening at the federal and provincial level. Due to time constraints and quantity of proposed changes, the Ministry did not have time to prepare a document that usually accompanies the proposed code changes and provides background information/reasoning which has provided challenges to SCOBCAR in reviewing, commenting and then accepting, rejecting or providing recommended revisions.

Additional proposed changes for the next edition of Ontario's Building Code will be posted for comment in the winter of 2022. These proposals will focus on 2020 National Construction Code changes.

Other Projects and Initiatives under the Practice Portfolio

[Practice Advisory e-newsletter – Issue 15](#): The latest e-newsletter was published on November 19, 2021 and featured information on the revised CDAO and upcoming guide best practices around RFP, COVID-19 vaccination and client requesting attestation to that effect, etc

Interference Drawings: The OAA-OGCA Joint Committee met on May 27. OGCA took the notes that had been prepared following consultation with Practice Resource Committee and key members of the Executive. At the meeting, they presented a draft definition and discussion occurred. VP Practice discussed this at the PRC meeting at the end of June and is working on reporting back to the key Executive Committee members prior to sending notes back to OGCA later this September. At this time the PRC committee did not endorse the OGCA definition nor was a revised consensus version of the definition created. VP Practice and PAS are continuing to review the next steps for a resolution on this item.

Supporting Committees and departments at OAA: PAS provides feedback on interdepartmental projects.

Website update: PAS continues to work with Communications on updating the library of Practice documents and web content.

Committee Updates

Practice Resource Committee (PRC): The PRC has reviewed a variety of topics at its recent meetings that directly affect members on a day-to-day basis including Procurement/RFP i.e. setting minimal requirements that cannot be met locally resulting in diminishing of local expertise and Recruiting and Maintaining Staffing i.e. Who is the profession attracting? Is the profession a financially rewarding experience? Challenges with finding and keeping intermediate staff. The committee continues to author peer-to-peer content for the website with thorough review and comment by all committee members; new content is intended to be available soon.

Subcommittee on Building Codes and Regulations (SCOBCAR): The committee continues with its review of the 876 proposed code changes through both individual committee member review and then group consensus meetings. This process is intended to be completed shortly in preparation for the December deadline although the MMAH has also indicated they would allow additional time for comments past this date if required. A significant amount of the changes reviewed to date have been acceptable without comment by the committee as many of the revisions have been to harmonize with the National Building Code (NBC). The committee continues to hold the assessment of the currency of the listing of OBC referenced standards focusing on the CSA standards project at this time due to its concentration on the OBC changes review.

Action: **None. For Information Only.**

Attachments: None.

ITEM 6.7.a

**To Be
Distributed**

Memorandum

FOR COUNCIL MEETING
December 10, 2021
(open)
ITEM: 6.8.a

To: Council

Susan Speigel	Farida Abu-Bakare
J. William Birdsell	Heather Breeze
Donald Chen	Barry Cline
Gordon Erskine	Paul Hastings
Jennifer King	Natasha Krickhan
Kathleen Kurtin	Jeffrey Laberge
Michelle Longlade	Agata Mancini
Lara J. McKendrick	Elaine Mintz
Deo M. Paquette	Kristiana Schuhmann
Gaganjot Singh	Andrew Thomson
Settimo Vilardi	

From: Governance Committee

Kathleen Kurtin, Chair	Michelle Longlade
Jeffrey Laberge	Elaine Mintz
Susan Speigel	

Date: December 2, 2021

Subject: Governance Committee Update

Objective: To provide Council with and update on recent activities of the Governance Committee

On November 30, 2021, the OAA's Governance Committee met and discussed the following topics.

Of particular note was discussion regarding the results of the RFP and selection of a strategic planning consultant – Kathy McLaughlin & Associates has been engaged and the process has begun. Council will expect to receive a survey shortly, along with staff and other key stakeholders as the consultant begins to gather information to support the process. There will be a two-day planning session on February 3 and 4 in Toronto at the OAA Headquarters. These dates are already booked for the Council's annual priority planning session.

The Committee also reviewed the proposal for return to office as presented by Executive Director, Kristi Doyle. The full plan will be addressed elsewhere in the Council package as part of the ED's regular update.

The Committee was joined by the Registrar, Christie Mills to review the process for Election of Officers that will occur in January to ensure that the instructions are clear for all involved.

The Committee also received a brief update from Doyle regarding the implementation of the recommendations from the Operational Review. A more detailed update is included with the ED's regular update report.

The Governance Committee also agreed that existing Council members should be approached to enlist their participation in an information 'buddy system' for new Councillors as they begin their term on Council in the new year. This would be beneficial for new Councillors who may have questions they wish to ask, or gain a better understanding of specific elements of being a member of Council as well as OAA activities.

The Committee discussed the extent to which Council has used the OAA membership that had been established this year in the Institute for Corporate Directors. Council is encouraged to avail themselves of this resource.

Action: None. For Information only.

Attachments: None.

ARCHITECTURAL INSTITUTE OF BRITISH COLUMBIA | ALBERTA ASSOCIATION OF ARCHITECTS | NORTHWEST TERRITORIES ASSOCIATION OF ARCHITECTS
SASKATCHEWAN ASSOCIATION OF ARCHITECTS | MANITOBA ASSOCIATION OF ARCHITECTS | ONTARIO ASSOCIATION OF ARCHITECTS | ORDRE DES ARCHITECTES DU QUÉBEC
ARCHITECTS' ASSOCIATION OF NEW BRUNSWICK/ASSOCIATION DES ARCHITECTES DU NOUVEAU-BRUNSWICK | NOVA SCOTIA ASSOCIATION OF ARCHITECTS
ARCHITECTS' ASSOCIATION OF PRINCE EDWARD ISLAND | ARCHITECTS LICENSING BOARD OF NEWFOUNDLAND AND LABRADOR

CALA | ROAC SEMI-ANNUAL MEETINGS REGULATORS AGENDA

Remote Location | November 5, 2021

DATE | Friday, November 5, 2021
TIME | 10:00am – 1:00pm PST
LOCALE | [Zoom Meeting hosted by Michaela Bogart \(CALA\)](#)
CHAIR | Jim Marriot, President (NSAA)

ATTENDEES | REGULATORS

AIBC Stuart Rothnie, *President*
Marguerite Laquinte Francis, *Vice-President*
Mark Vernon, *CEO*
Thomas Lutes, *Deputy CEO, General Counsel*
Jenelyn Torres, *Director of Registration*

NWTAA Simon Taylor, *President*
Celeste Mackay, *Registrar*
Natasha Bhogal, *Executive Director*

AAA Keesa Hutchinson, *Council CALA Rep*
Grant Moore, *Registrar*
Barbara Bruce, *Executive Director*

SAA James Youck, *Council CALA Representative*
Whitney Robson, *Executive Director*

MAA Doug Hanna, *President*
Lindsay Oster, *Immediate Past-President*
Judy Pestrak, *Executive Director*

OAA Susan Spiegel, *President*
Kathleen Kurtin, *Immediate Past President*
Kristi Doyle, *Executive Director*
Christie Mills, *Registrar*
Settimo Vilardi, *VP Practice*

OAQ Pierre Corriveau, *President*
Sébastien-Paul Desparois, *Directeur général*
Jean-Pierre Dumont, *Directeur des affaires
juridique et secrétaire de l'Ordre*

AANB Malcolm Boyd, *National Rep/Registrar*
Sylvain Lagacé, *President*
Donald Sterritt, *Past President*
Karen Chantler, *Executive Director*

AAPEI Lorin Brehaut, *President*
Scott Stewart, *Executive Director*

ALBNL Greg Snow, *Registrar*
Jeremy Bryant, *NLAA President*
Lynda Hayward-Kirkland, *Executive Director*

NSAA Jim Marriot, *President*
Margo Dauphinee, *Executive Director*

ATTENDEES | COMMITTEES

CACB Dave Edwards, *Chair*
FOA Darryl Condon, *Chair*
CEXAC Chris Babits, *Chair*
IRC Peter Streith, *Chair*

ATTENDEES | STAFF

CALA Michaela Bogart, *Administrative Coordinator*

ATTENDEES | EXTERNAL

CACB Nathalie Dion, *President*
CACB Mourad Mohand-Said, *Executive Director*
Charlene Pineda, *Dir. Programs and Operations*
RAIC Mike Brennan, *CEO*
Jason Robbins, *President-Elect*

AGENDA ITEM		AGENDA TOPIC	PRESENTER
	9:50 AM	Meeting room available online <i>Please sign in ahead of time to allow for any unexpected technical difficulties. All participants are asked to have their video turned on and full name/jurisdiction displayed in Zoom. Attendees will be muted upon entry.</i>	
1.0	10:00 AM – 10:10 AM	Welcome 1.1 Adoption of Agenda 1.2 Review of Previous Meeting Minutes & Business June 2021	Jim Marriot, President (NSAA)
2.0	10:10 AM – 10:35 AM	Royal Architectural Institute of Canada (RAIC) 2.1 Update from the Office of the President 2.2 Update from the Office of the CEO	Jason Robbins, President-Elect Mike Brennan, CEO
3.0	10:35 AM – 10:55 AM	Future of Architecture Sub-Committee 3.1 Future of Architecture Report to CALA 3.2 <i>Architecture Policy for Canada</i> 3.3 2022 Budget	Darryl Condon, Chair
4.0	10:55 AM – 11:15 AM	Committee for the Examination of Architects 4.1 CExAC Report to CALA 4.2 2022 Budget	Chris Babits, Chair
5.0	11:15 AM – 11:35 AM	International Relations Committee 5.1 IRC Report to CALA 5.2 ACE Update 5.3 2022 Budget	Peter Streith, Chair
	11:35 AM – 11:45 AM	Break	
6.0	11:45 AM – 11:55 AM	Report from the Administrators Meeting	Kristi Doyle, OAA
7.0	11:55 AM – 12:15 PM	CALA Incorporation Task Force 7.1 Update on Incorporation 7.2 Implementation - Next Steps	Thomas Lutes, AIBC General Counsel

AGENDA ITEM		AGENDA TOPIC	PRESENTER
8.0	12:15 PM – 12:35 PM	CACB Standing Committee Semi-Annual Report	Dave Edwards, Chair
		8.1 Semi-Annual Report to CALA	
		8.2 2022 Budget	
9.0	12:35 PM – 12:50 PM	Canadian Architectural Certification Board	Nathalie Dion, President
		9.1 Office of the President	Mourad M.-Said, Executive Director
		9.2 CACB Report to CALA	Charlene Pineda, Director of Programs and Operations
10.0	12:50 PM – 1:00 PM	New/Other Business	All
11.0	1:00 PM	Adjournment	Jim Marriot, President (NSAA)

REGULATORS MEETING MINUTES

Remote

SPRING 2021

DATE | Friday, June 4, 2021

TIME | 10:00 am – 1:00 pm

LOCATION | Remote

CHAIR | Pierre Corriveau, President (OAQ)

ATTENDEES | McDonald (AIBC), Rothnie (AIBC), Hutchinson (AAA), Moore (AAA), Youck (SAA), Oster (MAA), Hanna (MAA), Spiegel (OAA), Mancini (OAA), Kurtin (OAA), Corriveau (OAQ), Boyd (AANB), Lagacé (AANB), Sterritt (AANB), Brehaut (AAPEI), Bryant (NLAA), Trifos (NSAA)

CHAIRS | Condon (FOA), Edwards (CACB Standing), Babits (CExAC), Streith (IRC),

STAFF | Russo (NWTAA), Vernon (AIBC), Torres (AIBC), Lutes (AIBC), Bruce (AAA), Moore (AAA), Robson (SAA), Pestrak (MAA), Doyle (OAA), Mills (OAA), Desparois (OAQ), Dumont (OAQ), Chantler (AANB), Hayward (ALBNL), Snow (ALBNL), Dauphinee (NSAA), Stewart (AAPEI), Bogart (CALA)

GUESTS | Dion, *President* (CACB), Mohand-Said, *Executive Director* (CACB), Pineda, *Director, Programs and Operations* (CACB), Brown, *President* (RAIC), Brennan, *CEO* (RAIC), Boniface, *VP Corporate Affairs* (RAIC), Mitchell, *Director of Practice* (RAIC)

1.0 Welcome

Corriveau (OAQ) called the meeting to order at 10:03 a.m.

1.1 Adoption of Agenda

Meeting agenda accepted without changes.

1.2 Review of Previous Meeting Notes & Business | November 2020

Previous meeting minutes approved.

2.0 Royal Architectural Institute of Canada (RAIC)

2.1 Update from the Office of the President

Brown (RAIC President) provided an update that RAIC is ramping up advocacy efforts throughout the country. They are in the process of developing responses and policy to the overall network from a North American point of view. In the process of examining various models of the way licensure and advocacy intersect. RAIC has re-engaged with UIA.

The RAIC is working to actively lobby within the government on behalf of architects in response to COVID-19.

2.2 Update from the Office of the CEO

Brennan (RAIC CEO) thanked CALA for inviting RAIC to speak. RAIC is in the midst of their conference and have received positive feedback and good engagement thus far. RAIC no longer has their office space and have been working diligently from home. They are looking to purchase property for a new office space. Brennan noted that the RAIC has transitioned to a completely, virtual learning platform.

The RAIC maintains strong membership retention. Despite those that asked for financial relief, RAIC still managed to increase member base (they currently have 5000+ members) in 2020. Going into 2021, RAIC will maintain virtual platforms for all of their learning activities. They were due to build out a new strategic plan this year, but the 3-year strategic plan will most likely not happen until 2022.

Boniface (RAIC VP Corporate Affairs) provided an update on RAIC initiatives. Noted that they have prioritized equity and justice initiatives this year. They are working towards reconciliation with indigenous peoples in Canada. RAIC Board created a Truth and Reconciliation task force. RAIC has also launched a cultural awareness program for their members. Boniface encouraged those interested to reach out for more information. The equity and justice committee is helping RAIC advance EDI initiatives; they are embedding resources organizationally and within the greater architectural community. Boniface noted that the RAIC is responding to Minister McKenna's national infrastructure assessment and call for feedback.

2.3 Canadian Handbook of Practice (CHOP)

Mitchell (RAIC) spoke more about the national infrastructure assessment call for feedback and that RAIC is trying to gather members for a roundtable to draft response. They are targeting a submission deadline by end of the month. RAIC is working on professional services contract that is not specifically related to building, design, and construction. They have recently established a new fees and procurement group to examine architectural fees structure.

Regarding CHOP, issues are being addressed and updated on the website as they are discovered. RAIC has put together a new maintenance renewal plan for CHOP with a corresponding renewal agreement that is going through legal review as well as the final version of licensing agreement.

3.0 Future of Architecture Sub-Committee

3.1 Future of Architecture Semi-Annual Report

Since last update, FOA sub-committee have moved ahead with their plans for phase 2 for consultation and validation of draft policy. They are shifting focus from in-person sessions to online events. They are working to further refine the documents introduced at the fall meeting and develop new communication material that is more public facing. FOA will be launching updates to the website soon and is developing a more detailed plan. A series of online consultations that are public focused will take place in Fall 2021. FOA is seeking speaker suggestions from CALA. Specifically, people that are active and involved in your respective communities. FOA is working towards a final white paper that we hope to present at the CACB conference. We are targeting completion of the work of phase 2 in 2022.

Previous years administrative support through OAA and AAA, currently being taken on by CALA Administrator.

The federal government has committed to conducting a National Infrastructure Assessment and has launched an engagement process and are seeking feedback. Many of the issues align with calls to action that FOA have been developing and thus they are taking advantage of the opportunity to provide a response to the call for feedback. The committee is currently reviewing and preparing a submission to align with the emerging priorities of the Architecture Policy for Canada initiative. We are hopeful that by providing this feedback at this time we may be better positioned for the time we submit our final report.

The funding for 2021 was approved during the Fall 2020 meeting and it is anticipated that similar funding will be required for the 2022 activities. The committee will come forward with a budget request prior to the Fall 2021 CALA meeting.

4.0 Committee for the Examination of Architects

4.1 CExAC Report to CALA

Babits (Chair) provided an update on the 2020 ExAC administration. CExAC provided a detailed report to CALA in April 2021. Areas of concern within the exam were the discrepancy between Francophone and Anglophone participants. 60% of the Interns who asked for review were from Quebec. This demonstrates that the experience of the francophone candidates was not equivalent to their anglophone counterparts. 108 sections of the exam were reviewed. The 2020 administration had the highest number of exam writers compared to previous years. The exam review process took 2-3 times as long as it normally does due to the online format. Of the 108 sections that were reviewed, 21 passes were granted (higher than in previous years).

CExAC has recommended that the next sitting of the ExAC be a written exam. AAA did not approve the administration of the written exam. The committee is proceeding with a continued effort to move the exam to an online format. CExAC proposes developing terms of reference for how best to consider the viability of an online format into the future, based on the experience with the first online ExAC.

Regarding next exam administration date, CExAC tried to determine a date that would allow them to avoid winter storms. There was uncertainty around the idea of holding the exam in November 2021. Contingency dates were set for February 28 and March 1 with a registration date of June 7th.

Vernon (AIBC) noted that administrators would like to have a business case for the transition to an online exam. CALA needs to know the resources required to ensure that the exam is relevant and technologically adept. Dumont (OAQ) indicated that CALA requires more data. Kurtin (OAA) noted that we are in a period of transformational change and that CExAC cannot remain complacent with the current written exam.

Vernon (AIBC) explained that the motivation for the administrators to have an online exam is accessibility. They would like to offer interns who are in remote areas the opportunity to take the exam. With an online exam, they would be able to offer multiple sessions a year.

Dumont (OAQ) enquired as to whether the date is confirmed for the February/March 2022 exam. It was requested that CExAC extend the registration period to align with the later exam date. Pestrak (MAA) noted that June dates were tied into November administration date. It is expected that if we know the dates are being moved that the registration would be aligned to capture as many interns as possible.

5.0 International Relations Committee

5.1 IRC Report to CALA

Streith (Chair) provided an update on virtual meeting for the Tri-National agreement. During this meeting, the jurisdictions reviewed a couple of items that the committee was looking at, specifically, the possibility of virtual interviews and experience gained. They had initial conversations with NCARB and NCARM on the development of potential of development of virtual interviews under the tri-national agreement. IRC is seeking CALA's approval to move forward.

Regarding the APEC agreement there has been interest but no movement since discussions at Fall 2020 meetings with regards to Japan. The current Tri- National agreement with Australia, New Zealand and Canada requires a domain specific assessment which is currently being conducted by a dossier submission and an in-person interview. They plan to leverage the course that was built for the ACE agreement. In turn Australia and New Zealand will offer their interviews online to avoid travel costs for Canadians.

5.2 ACE Update

Global Affairs is working with CETA and it is taking significantly longer to move the file folder. Online course and application fee will be combined. OAQ has done some preliminary calculations and has determined that \$750 will be required to administer the application and provide applicants access to the online course. They have not finalized an exact number for the application cost to OAQ. Once OAQ processes the application, it will be forwarded to the provincial regulator the applicant would like to practice in. The applicant would pay the registration fee for the province at that time. There is a 3-month time frame to complete the course. Applicants can only take the test a maximum of three times. The applicant will be notified if they do not pass the course and that they must wait a minimum of six months before they can reapply.

A few of the more contentious issues that are still being discussed include residency requirements with Italy, Hungary and Slovakia. These three states have residency requirements in order to practice architecture. Italy will be replacing their residency requirement, with the requirement to have a business address. Slovakia noted that an office address is sufficient to satisfy the residency requirements. Hungary has made no changes in regard to legislation. EU will be following up with the appropriate Hungarian authority.

Oster (MAA) and Dauphinee (NSAA) had questions they will address with Streith (IRC) over email. Doyle (OAA) noted that the OAA supports moving to a virtual interview process for NCARB/NCARM. Dumont (OAQ) noted that in Quebec they have been in consultation with the economy ministry, the admission and fairness commissioner and the Office of professions reviewing the current ACE MRA. These consultations may change the current MRA. They will address these changes with the IRC.

ACTION: IRC requested permission from CALA to continue discussing with NCARB and NCARM regarding virtual interviews and minor adjustments to the current tri-national agreement to make it more current.

6.0 Report from the Administrators Meeting

Doyle (OAA) provided an update on the Administrators meeting that took place on June 3, 2021. The administrators discussed CExAC and CALA Incorporation. CALA demographics survey will be sent out in June. The administrators discussed CHOP and are working through the process of trying to get the licensure agreement finalized. Continuing education portal that OAA has been working on and partnering with other regulators to offer educational opportunities.

7.0 CALA Incorporation Task Force

7.1 Update on Incorporation

Lutes (AIBC) provided an overview of the CALA incorporation structure. There were several principles established by the CALA Incorporation task force in regard to incorporation which included: equality of voice, autonomy of voice, architectural voice and decision-making. The principles were designed to ensure that what is working well with CALA currently remains in the incorporated entity.

The current, informal CALA structure when it is superimposed on the not-for-profit act does not impose perfectly. The members of CALA (11 jurisdictions) would appoint a director to represent their jurisdiction and sit on the board of directors, to discuss the things we are discussing today (i.e., regulator's meeting). Not-for-profits have members, every regulator is a member, and each regulator would appoint a member representative. There will need to be a member's meeting at least once a year. A short, virtual meeting, however, the real business takes place at the directors' meetings. Lutes (AIBC) believes the articles of incorporation and bylaws have met the original incorporation principles. Lutes (AIBC) asks the regulators to review the documents and bylaws next week and provide feedback.

Desparois (OAA) requested translation of the incorporation documents to receive feedback from OAA council. Kurtin (OAA) enquired about registering the name (Regulatory Organizations of Architectural Councils) and the cost associated to reserve the name trademark. Lutes (AIBC) noted that if they have approval with the name, they will move ahead with reserving the rights to the name. Rothnie (AIBC) enquired as to who the members are – they are regulators – but who is the representation? Is it councilor? Each regulator would decide who their director would be – take the names that every member puts forward – and cast vote. Core group of 11 directors from each regulator as well as councilors and architects.

ACTION: Lutes (AIBC) to send draft articles and bylaws to regulators who will have one month to review and provide feedback.

8.0 CALA Committees Overview

8.1 Proposed Changes to Terms of Reference

Dauphine (NSAA) provided an overview of the proposed changes to the terms of reference. The working group wanted to build out greater accountability and described processes into the existing terms of reference for International Relations Committee and CACB Standing Committee. They have adjusted the terms of reference so that more members can join for specific initiatives. They have also embedded a process for transition and succession of committee members. The terms of reference will be reviewed on a periodic basis (every 3-5 years). The revised drafts have already been shared with the committee chairs.

8.2 Next Steps

Chantler (AANB) noted that they are open to any questions. The revised terms of reference will go to respective councils for approval at their next meeting. Per the revised terms of reference, CALA is requesting that each committee provide a transition plan by August 15, 2021. Expression of interest template will be created that will be distributed to the regulators/regions that require a candidate. The candidates would then go to CALA for approval. Terms for new members would begin in January 2022. Reappointment of members will also require a submission of an expression of interest.

Mancini (OAA) enquired whether incorporation would affect the documents. Chantler (AANB) confirmed they would not. Desparois (OAQ) enquired about processing of removing older member and the level of sensitivity involved. Chantler (AANB) replied that they have discussed this with committee chairs and will reappoint members on a rotational basis.

ACTION: The revised terms of reference will be sent out to the regulators via email for review and approval.

9.0 CACB Standing Committee Semi-Annual Report

9.1 Semi-Annual Report to CALA

Edwards (Chair) provided brief update to CALA regarding CACB Standing committee activities. They have proceeded with virtual BEFA interviews after receiving approval from all the CALA jurisdictions. They are in the process of conducting training sessions for assessors. They have also reexamined protocols for the evaluation of assessors. The committee, on behalf of the regulators, has applied for further funding from Economic and Social Development Canada (ESDC). The committee has prepared a mentorship guide for BEFA candidates (provided in CALA package) for review. The committee is working with IRCC and CACB on an agreement to provide services to potential immigrants prior to their arrival in Canada.

10.0 Canadian Architectural Certification Board

10.1 Office of the President

Dion (CACB) noted despite pandemic restrictions the CACB has proceeded with normal operations. Team has been working remotely but have maintained normal operations. The CACB board has been meeting virtually.

10.2 CACB Report to CALA

Mohand-Said (CACB) presented the CACB report to CALA and welcomed questions. CACB reacted to COVID-19 by performing virtual visits and worked with other organizations to put together best practices and procedures to perform accreditation visits virtually. They are completing 2021-2022 cycle with the hope of returning to normal operations. Dalhousie University to put in place APR system that audits programs based on self-assessment. Based on the virtual visit, procedures will be brought to CACB's board attention to determine the best cost. It may be an effective tool they can use for accreditation visits.

The CACB conference is currently scheduled to be held in Ottawa on May 26-29, 2022. Total applications for academic certification in 2020 increased despite COVID-19. There were some minor delays in processing times related to COVID-19 office closure. AANB received first BEFA candidate since 2013.

11.0 Adjournment

Meeting adjourned at 12:56 p.m.

Memorandum

Date: November 5, 2021

To: All Presidents and Executive Directors/CEOs

From: Darryl Condon, AIBC Past-President,
Chair, Sub-Committee on the Future of Architecture

Re: **Update on the Architecture Policy for Canada Initiative**

1.0 Background

This report provides a status update, from the Future of Architecture Sub-Committee, on the efforts focused on creating a renewed vision for the profession and to compile recommendations for a future Architecture Policy for Canada. The sub-committee includes representatives of CALA, CCUSA and the RAIC. The final products will be available to key profession stakeholders (Regulators, Schools, and advocacy organizations) for use in future discussions on the future of the profession. The final documents will also include recommendations for governments to consider.

Since the last update, the committee has been working towards the completion of this phase of the initiative during 2022 with the addition of public input components.

2.0 Process Outline

The development of an Architecture Policy for Canada is a multi-phased process. The three phases are:

1. Development of consultation documents and consultation process (Completed October 2018)
2. **Consultation and Validation of Draft Policy Recommendations, including recommended actions. (Current phase)**
3. Implementation of recommendations and/or support for implementation of a future Architecture Policy for Canada (future phase)

3.0 Progress Update

Refinement of Consultation Documents

The revised consultation documents, in both French and English, have now been completed subject to a final editorial review.

Communication Strategy update

The committee has engaged a communications consultant who has provided strategic advice related to communications and has facilitated coordination of various deliverables. This work will continue into 2022.

Public input update

In collaboration with our facilitation advisor, Alain Rabeau, the committee has determined that the best approach for meaningful public input will be in the form of an online survey. The intent is to widely distribute the survey, in early 2022, and to support its uptake through social media advertising. It is intended that this will provide a critical mass of feedback to support our final recommendations.

Video Production

The short videos (both in French and English), which will be components of our social media campaign leading up to the public consultation events, are now complete. The graphic approach and illustrations utilized in the videos have been coordinated with the new consultation documents, and upcoming website revisions, to provide a cohesive approach. Video snippets have also been created for broader use during the social media campaign.

Website Renewal

Updates to the website are in progress updating the riseforarchitecture.com website to align both with the new identify and graphic approach as well as for the public facing consultations. The renewed website will include a public survey portal and will be one of the key means of obtaining feedback from the public. It will also be revised to allow for future updates anticipated for when the final recommendations are completed in late 2022.

Independent Polling

Based upon advice, from government officials, it is the committee's opinion that independent polling can be a valuable contribution in building political support for the final recommendations. The committee is currently in discussions with a national polling company to collaborate on a comprehensive survey of public opinion. This will provide quantitative data that complements the more qualitative online survey that we will be administering.

4.0 Completion of Phase Two

As we work towards the completion of this phase of the work in 2022, the following items are key milestones:

Draft Recommendations and Actions

In parallel with the public input, the committee has turned its attention to developing the final document(s) that will summarize our findings and provide recommendations for future actions. The recommendations will be compiled in report and presentation format. We anticipate that the draft recommendations will be complete in April 2022. If there is interest, we could host an online meeting to review the findings prior to completion.

CACB Conference

We look forward to the opportunity of presenting, and discussing, our findings at the upcoming CACB Conference. This will be a key opportunity to share the results of the process that initiated at the previous CACB Validation Conference. It is an opportunity for feedback and endorsement.

RAIC Conference

We have had preliminary conversations with the RAIC about presenting our findings at their 2022 conference in Vancouver. This will provide an additional opportunity to raise awareness and build support for the recommendations.

Regulator Conferences

Given the timing of the completion of our findings, there is also the opportunity to share these at Regulator conferences in mid to late 2022. We have not made applications to present to the various regulator events but rather anticipate that should any regulator wish to have us participate and present, we would be pleased to do so.

Endorsement

While we recognize that some of the Regulators may not be able to provide formal endorsement of our report(s), receiving endorsement, or support, from as many individuals, organizations and industry stakeholders will be an important component when we deliver our results to the federal government. For those regulators that can provide formal endorsement of the findings we request that you make plans to do so. Any feedback on challenges or timing would be appreciated as early as practical.

5.0 Financial Considerations

As in previous years, a new funding request is required for the committee to continue with this initiative. The 2022 allocation request is based upon the current workplan, and the funding request has been reduced by funds remaining from 2021.

Currently, we are requesting a continuation of funding for 2022 at \$8.00 per member.

PROPOSED 2022 COMMITTEE BUDGET

Revenue	2022 Anticipated Expenditures
Remaining from previous year	\$26,203.
2022 Regulator funding (\$8.00 per Architect)	\$79,997
Total	\$106,200
Expenses	
Communication	25,000
Facilitation Support	5,000
Consultation Costs (Public Survey)	15,000
Committee Costs	25,000
Admin Support	5,000
Graphic design services	5,000
Web site services	2,500
Social media – paid social	20,000
Miscellaneous / Contingency	3,700
Total	\$106,200

6.0 Recommendations

The sub-committee recommends the following:

1. That funding for the next year of phase two (2022) be based upon a per Architect allocation of \$8.00 per Architect.

In addition to these recommendations, the committee requests that each Regulator consider the following:

1. Given the anticipated schedule of completion of phase two during 2022, each Regulator will be requested to provide some form of endorsement of the final report(s), to the extent possible for each jurisdiction. It would be helpful for the committee to be aware of any timing and/or challenges related to this request.
2. To assist with the widest possible distribution of the public survey, the assistance of Regulators to communicate through each of their channels would be appreciate. The committee requests that each regulator, that can support this initiative in his way, to provide a communication contact for coordination.
3. Regulators to consider the opportunity of integrating a presentation of the committee's findings at their 2022 conferences.

Submitted Respectfully by:

Darryl Condon Architect AIBC – AIBC Past President
Chair, Future of Architecture Sub-Committee

On behalf of

CALA Members of the Future of Architecture Sub-Committee

Karen Chantler	AANB Executive Director
Darryl Condon	AIBC Past-President
Toon Dreessen	OAA Past-President
David Edwards	SAA Past-President
Scott Kemp	AIBC Past-President
Celeste Mackay	NWTAA Past-President
Therese LeBlanc	NSAA Past-President
Gordon Richards	AIBC Past-President
John Stephenson	OAA Past-President
Mark Vernon	AIBC CEO



Examen des architectes du Canada
Examination for Architects in Canada

CExAC Report to CALA November 5, 2021

Presented by Christopher Babits, Chair

The Provincial/Territorial Architectural Licensing Authorities in Canada have the mandate to ensure both public safety and professional skilled delivery of architectural services in their respective jurisdictions. The Examination for Architects in Canada (ExAC), as a licensing/registration examination, is one of the established mechanisms to ensure the competence of architects when they enter the profession. The CExAC is a six-member committee selected by the Jurisdiction Licensing Authorities to provide oversight of administration. This an update of the activities and schedule of the CExAC.

- **September 24-25th CExAC Business & Strategy meeting** – The Committee held a business and strategy meeting in Montreal with reviews of progress on the online study and set direction for the upcoming year. The CExAC also had meetings with Don Sterritt as representative with the CACB Standing Committee, to help align themes/objectives of the ExAC with the updated Intern Architect Program and review the direction of future IAP updates.
- **Update on the Study: Feasibility study for the transformation of the ExAC from a paper exam to a computer-based exam** – The CExAC briefly met with Serge Boulé, Ph.D. Psychometrics, to review progress of the study requested by CALA and begun in August. All appears to be on schedule however, some documentation from both French to English, and from English to French, may cause some minor delays. Currently, the preliminary draft should be reviewed by CExAC in late November with a planned presentation to CALA of the results in mid-December.
- **2021-22 CExAC Schedule–**
 - Deadline for Interns to submit experience hours: October 1, 2021
 - Deadline for Interns to register for next exam: October 15, 2021
 - ExAC Objective review/update for spring 2022: October 22, 2021
 - New item writing: mid-November 2021
 - Computer-based ExAC Feasibility Study CALA Presentation: mid-December 2021
 - New item vetting: January 28, 2022
 - CExAC business update meeting: January 29, 2022
 - Next ExAC sitting (pencil and paper exam): February 28-March 1, 2022
 - Results anticipated: April 2022
 - CExAC business meeting and 2022 new exam vetting mid-late April 2022
 - End of April 2021 (tentative) – Anticipated for release of ExAC results to CALA jurisdictions/interns
 - ExAC 2022: early November 2022
- **November 2022 ExAC** – The CExAC proposes to return to the established typical schedule for the paper-pencil ExAC in November 2022. The CExAC requests that CALA consider this formal notification of this goal, with the acknowledgement that this will mean that two exam sittings will be held in 2022 and that CALA consider the budgetary impacts of two exam sittings on your 2022 budgets.
- **ExAC Co-Administrators and Consultants** - The Committee would like to recognize the continued outstanding commitment of ExAC National Co-Administrators Virginie Harvey of the OAQ, and most profoundly, Jon Clark, of the OAA. Jon, and Virginie have the full support and appreciation of the CExAC as they continue to provide their outstanding abilities and experience to the responsibilities of annual delivery of the ExAC. Additionally, we are privileged to have very experienced and knowledgeable consultants with Serge Boulé, Daniel Turpin and Joanne Reid, on whose prudent advice and knowledge the Committee depends on to make well-informed decisions.

International Relations Committee (IRC) report for the 2021 Fall CALA meeting

Canada – Europe (MRA)

The IRC continues to support Global Affairs with their ongoing discussions with the European CETA MRA review committee regarding the binding of the ACE-CALA MRA to the CETA agreement. As the Architectural Council of Europe (ACE) is not the official regulatory body for the European States, the ACE-CALA MRA needs to be bound into the trade agreement to bind all of the European States to the term and condition of the MRA.

The recent Federal election slowed down the discussions with Global Affairs and the EU, but the final round of negotiations recommenced on October 13th, with the intent of concluding the negotiations in the next couple of months. The focus of the discussions has been related to ensuring the base framework of the MRA text is consistent with Canada's CFTA (Canada internal Free Trade Agreement between the Provinces and Territories).

The IRC provided positive feedback to Global Affairs on the proposed revisions to the text, as it recognized CALA authority (the 11 provincial and territorial Architects Associations) as the regulatory bodies for the Architectural Profession in Canada and as a negotiating entity under Chapter 11 of CETA in regard to the recognition of architectural credentials in Canada, plus CALA would need to ratify the updated agreement prior to its implementation. Global Affairs then shared the proposed recommendations with the P/T representatives.

To date there have been 6 multiday negotiating WebEx meeting with the EU, where significant progress has been made on the updated text.

Items that have been resolved with the EU in the negotiations:

- The purpose and content of the Domain Specific Online Course.
- That the cost of taking the online course will be part of the initial application fee. That the costs to administer the course and review an EU architect's application is to remain cost neutral to CALA members.
- That an EU applicant have a limited time frame to complete the online course (3 months) and that they can only take each of the Module Tests a maximum of 3 times.
- Text on the Right to regulate and that the Architectural Professional is provincially / territorially regulated in Canada.
- The acceptance by the EU that Quebec does have a language proficiency requirement to conduct business in Quebec. Still some minor text issues to be resolved but both sides agreed with the concept
- Resolution of the residency requirements in the three EU States (Italy, Hungary and Slovakia) that have a reservation under the CETA agreement. Each state will require a business address to practice in their jurisdiction but will not require residency in their State to practice. Updated text will be added to the agreement to confirm these requirements.
- The ability of a host jurisdiction to request a current criminal record check from the home jurisdiction as part of the application process, this requirement was identified by Quebec to keep the requirements consistent with the CFTA.

Items that require further discussions

- **Dispute Settlement:** Neither side wants an individual applicant to be able to file a complaint under the Dispute Settlement Section of CETA as this would invoke the trade dispute settlement mechanism in the body of the main CETA, effectively engage both the Feds and EU.

The IRC reiterated the purpose of the MRA monitoring committee and its purpose to review the application process to make sure that applications are being processed correctly on both sides, and if there was a specific reason why an individual was not registered (i.e. did not meet the requirements of the MRA or did not pass the online course) that these issues would be addressed with the monitoring committee. Please note that IRC has requested a full contact list of all European Regulators and who the EU representative would be on the MRA Monitoring Committee. Information is forthcoming.

ACE-CALA MRA Online Course

The IRC sub-committee completed its review of the Domain Specific Online course and provided the OAQ' with the suggested revisions to the course material. Updates have already been made to the course, which will need to be monitored on an ongoing basis to ensure the content remains current and relevant. The IRC committee will be reviewing the ongoing maintenance and servicing costs for the course and will make a recommendation to CALA on anticipated user costs to keep the course cost neutral.

As previously noted, the Online course may now be used by CALA for other educational purposes CALA deem appropriate (i.e. intern architects, BEFA candidates, etc.). The IRC recommends that the BEFA committee members be provided access to the online course to ascertain which modules would be beneficial as remedial educational purposes for BEFA candidates.

Canada – USA

On the Canada/United States Mutual Recognition Agreement (MRA), 40 states remain signatory to the agreement

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, District of Columbia, Georgia, Guam, Illinois, Indiana, Iowa, Kansas, Louisiana, Maryland, Massachusetts, Michigan, Missouri, Montana, Nebraska, New Hampshire, New Mexico, North Carolina, North Dakota, Ohio, Oregon, Pennsylvania, Puerto Rico, Rhode Island, South Carolina, Tennessee, Texas, US Virgin Islands, Vermont, Virginia, Washington, West Virginia, Wisconsin, Wyoming
(refer to CALA's website for a full list of states that remain signatory to the agreement).

Canada – Mexico – USA (Tri National MRA)

A Tri-National meeting was rescheduled to be held in Banff Alberta this April after the AAA Banff Session, with the intent of allowing our international colleagues to take part in the conference. Due to the various travel restrictions imposed by Covid 19, the IRC unfortunately had to reschedule the Tri-National Meeting to a virtual one held on Monday March 15th, 2021.

The committee reviewed several items to streamline the application process and to take advantage of advancements in technology.

- The topic of utilizing a virtual platform to conduct interviews was discussed to see if there was an appetite between all three parties. Each jurisdiction indicated that there was a potential for conducting virtual interviews and that certain protocols would need to be put in place to facilitate this process. Additional research and discussion would be required. Since CALA supports the transition to virtual interviews for BEFA candidates, the IRC recommends that the committee continue to review the potential of conducting virtual Tri-National Interview and leverage the significant work done to date by the BEFA committee.
- The potential of allowing credit for experience gained in the host country as part of the post licensure experience requirements (i.e., a member in responsible control), as many Mexican architects after getting licensed in their home jurisdiction work in the US for many years and this experience is not currently recognized under the agreement as the member is not in responsible control.
- The development of additional support documentation to assist the applicant with the development of their Dossier.
- The potential of using a “Drop Box” system in lieu of the CD Rom requirements in the current agreement for uploading the required dossier material.

NCARB will be hosting the next Tri-National meeting in the fall of 2022

APEC

The IRC has reached out to our Japanese colleagues to see if any progress has been made on their side and to see if an MRA under the APEC agreement is advisable. To date no movement has been made on this file.

Based on CALA direction at the Fall 2020 meeting, the IRC followed up with Australia and New Zealand and they agreed to the use of our Domain Specific Online Course in lieu of the interview for candidates coming to Canada. In turn they will offer their interviews online to avoid travel costs for Canadians.

IRC Committee Terms of Reference

Based on the updated Terms of Reference for the IRC, the Atlantic provinces issues an expression of Interest to serve on the committee. Two qualified members from the Atlantic region applied to serve on the IRC for a 4-year term. The IRC committee reviewed both applications and recommend that Leif-Peter Fuchs a member of the NSAA be appointed as the Atlantic representative on the IRC with a term starting on Jan. 2022 and ending on Dec 2025. Based on the recommended transition plan for long standing IRC members, Peter Streith of the AAA will be transition off the IRC at the end of 2022 and will need to be replaced by a member from Ontario to achieve the regional balance outline in the update terms of reference for the IRC.

IRC request to CALA:

1. That CALA approve the \$1.22/ member funding request for the IRC 2022 budget. Refer to the attached IRC budget breakdown for additional information.

2. That CALA approve Leif-Peter Fuch as the new Atlantic Region representative on the IRC for the 2022-2025 term.

October 25th, 2021

To: All Presidents and Executive Directors

From: David Edwards, Chair
National Standing Committee on CACB

On behalf of the National Standing Committee on CACB, we are pleased to report on the current work of the Standing Committee. We have continued to work remotely due to the continued pandemic.

Your current committee members are: Mark Vernon, Judy Pestrak, Karen Chantler, Gordon Richards, Don Sterritt and Therese LeBlanc. The Committee is also supported by several architects who have given their time as programs continued to be developed.

1. ESDC Funding

We have recently received verbal approval from ESDC of the funding that was submitted in our proposal to them this summer. They have approved the \$370,000 over the next twenty months years to continue to develop and finalise a mentorship program specifically for foreign trained architects applying for licensure in Canada. It will also be available to the regulators to use as the basis of their own mentorship program if they wish.

The funding will also allow the creation of animated training videos to explain the competencies required by foreign trained architects under the BEFA program and will complement the videos developed for the agreement with the European Union. These videos would also benefit interns and syllabus students.

It is hoped that the Agreement will be signed shortly. The project is scheduled to start on November 10th. 2021 until July 10, 2023.

2. BEFA Remote Interview

Following approval by the regulators, we will begin remote interviews for BEFA applicants. We currently have fourteen applicants ready for interview and assigned to panels. The interviews will start later this month and continue into November. As part of the process we have developed a comprehensive training program to help our assessors in conducting remote interviews.

As you are aware, each applicant requires three assessors (Chair, National and Regional) therefore, most of our active assessors are currently engaged to some

degree. In this context, the Committee has requested that jurisdictions approach their membership for potential new assessors.

3. Canadian Standard of Competency for Architects.

The architects on the Standing Committee met recently to discuss the current competencies and look at potential revisions. We reviewed all the comments that we have received from various regulators to see the effect they may have on the competencies. We confirmed that all the items raised are included in one form or another in the current Standard. There are basic themes that have emerged from the comments provided: Accessibility, Building Envelope and Sustainability (Resilience). We feel there is no need to introduce new competencies and that any revisions can be incorporated within the existing structure.

We are going to work with our senior assessors and some architects from the various jurisdictions in Zoom workshops to discuss the level and depth of the proposed changes. To ensure a productive consultation, we will provide them with a framework of changes being proposed to help focus the review. Once completed in early January we will send the updated competencies to all regulators as a draft and ask for comments. The final step will be to draft a final revised Canadian Standard of Competency for regulatory approval.

4. Interaction with CExAC Committee

On behalf of the Committee, Don Sterritt met with members of CExAC to discuss issues where collaboration may be beneficial. Topics of discussion included the competencies that have been developed and the items revised in the last IAP review process. There was also discussion around coordinating terms and language used.

5. IAP Review

At the completion of the last IAP review there were suggested edits and revisions which were left to be considered for the next review. It was agreed that a follow up review be done in 3-5 years. If it is the wish of CALA that the Standing Committee to undertake this review, it will be added to the work plan, which we believe would make sense.

6. Accreditation

During last year's effort to reach an agreement between CCUSA and CALA we were requested to investigate setting up our own accreditation system. To date the Standing Committee has not undertaken any work in this area and we need to start research on this item so that we can report to our regulators during the year. We need to reach out to similar professional organisations to develop background information on the process should our regulators wish to proceed along those lines. We have three years left in the current agreement between CALA and CCUSA and steps should be taken to start and advise on a potential process.

7. Validation Conference

The Conference is currently scheduled to be held in Ottawa from May 26-29, 2022. We hope plans will not have to change since this is a very important event and as such, the Committee will work with the CACB on the development of the conference program.

As part of the Validation Conference, the terms and conditions and procedures for accreditation will form a central part of the program and going forward will have to review and implement suggested amendments if any to the system.

8. Distance Learning

During the next year, the Committee will consider the impact that COVID-19 has had on the Terms and Conditions of Accreditation. Many of the schools of Architecture are exploring the continued development of distance learning, as it relates to architecture. One of the central aspects of an architectural education is the design studio and the interaction of faculty and students.

The Committee plans to reach out to allied organizations such as NCARB, NAAB, CCUSA and various architects to explore the continued evolution of this learning process. The committee will make an interim report for the fall CALA meeting.

9. CACB Budget

We are currently working with the CACB to finalise their budget, which will be circulated to all the regulators for approval once the Standing Committee has completed its review.

10. Standing Committee Budget

The Committee is requesting \$3.98 per architect for this year's operation and would allow for three full meetings of the committee and two sub committee meetings during the year.

IN CLOSING

Despite the ongoing pandemic, much has been accomplished, and work is continuing on a number of files. The Standing Committee appreciates your ongoing support, and we look forward to continuing to work on your behalf.

Should any Regulator have questions or concerns, please do not hesitate to contact me or any member of the Committee.



CACB-CCCA Latest Activities

Prepared for the Canadian Architectural Licensing Authorities
Meeting
November 5, 2021 (Zoom)

Mourad Mohand-Said^{B.Arch, M.Sc.A, Hon. MRAIC}
October 28, 2021

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1. GOVERNANCE AND OPERATIONS OVERVIEW

The CACB-CCCA operations and governing duties are still being performed through a hybrid model with staff working part time from home and part time in office, with Board and Committees' meetings and working sessions taking place virtually.

Fall Board Meeting:

At the Fall Meeting, the Board annually welcomes newly elected Directors and thanks departing Directors whose terms have ended.

Initially scheduled to take place virtually on November 19-20, 2021, the CACB-CCCA 2021 Fall Board meeting has been postponed to December 3-4, 2021 to allow more time for the two Members to appoint the three (3) expected new Directors to the CACB Board as the yearly replacement sequence between incoming and outgoing Directors.

The CACB-CCCA Board strives to enhance and strengthen the communication channels with and between its Members to manage the impacts on its Governance and Operations.

Annual General Meeting (AGM) of the Members

The AGM will not be held at the end of October this year as expected, due to the delay in receiving from the Nominating Committee the three (3) expected new Directors to the CACB Board, as per article 9.1.1.8 of the CACB By-law (below).

9.1.1.8 The Nominating Committee, comprised of representatives of CALA and CCUSA, shall develop a slate of Directors based on guidelines that take into consideration the Board Composition requirements defined in Section 6.2. Such slate shall be included in the Notice of the Meeting of the Members to be sent to the Members pursuant to Article 12.

The AGM will likely be postponed to the end of November with the hope that the names of the newly appointed Directors will be provided by both Members by then. Otherwise, the Board will operate with a reduced composition as per article 9.1.1.9 of its by-law (below) until the names are selected.

9.1.1.9 Should the Nominating Committee not be successful in identifying one or more candidates in accord with this Article then so long as there is an overall quorum for Directors such position shall be left vacant until the next annual Meeting of the Members.

Revising and Expanding of the Nominating Committee Size

Currently, the Nominating Committee composition consists of the Chair of the CALA Standing Committee and the Chair of CCUSA.

Upon a request from CCUSA, at the 2021 CACB-CCCA Special AGM, to review and expand the Nominating Committee Composition, the CACB-CCCA President reached out in May 2021 to both the chair of the CALA Standing Committee and the Chair of CCUSA to offer the CACB-CCCA support as a facilitator between the two Members in the process of appointing two additional representatives from each Member to the Nominating Committee. The purpose is to strengthen the important role of the Nominating Committee in coordinating and communicating about the joint nominee candidates and identifying through consensus the suitable candidate for the joint nominee position for election at the General Meetings of the Members.

2022 Budget

The CACB-CCCA is awaiting approval of its 2022 Budget, submitted for both Members in September, 2021, in accordance with its by-law.

Reserve Funds Surplus Proposal

The CACB-CCCA provided a proposal to the CALA Standing Committee on June 24, 2021 with recommendations for the measures that could be taken to use the surplus of its Reserve Funds and ensure compliance with the CRA recommendations and best practices. The level of implementation of the suggested measures will be processed as soon as the CACB-CCCA receives a response.

CACB-CCCA Conference: Final Confirmation of Dates Required

Initially planned in 2020 in Halifax, NS at the Lord Nelson Hotel, the conference was postponed twice; to September 24-25, 2021, in Ottawa at the Marriott Hotel, and then to May 27-28, 2022 also at the Marriott in Ottawa.

The format of the Conference will be similar to the 2014 Conference. The Conference Survey has been issued and they will be followed with an updated call for Issue Papers submissions.

All issue papers received will be made available to all conference delegates as background reading materials to the conference to further inform the dialogue. The issue papers will be used, along with the survey results, to help shape the conference agenda by confirming the relevant topics to be discussed.

The CACB-CCCA has received lately from the CALA Standing Committee concerns about the uncertainty of COVID-19 and the timing of the CACB Conference planned for May 27-28, 2022. They have asked if a later alternative Fall 2022 date can be proposed for consideration by the Members. We have reached out to the Marriott hotel to see what options might be available and they offered October 27-30, 2022 as the only availability in the Fall of 2022.

Therefore, the following dates of **October 28-29, 2022** (Travel Days: 27 and 30) are proposed as an alternate to the May 27-28, 2022 (Travel Days: 26 and 29) dates.

Should the Members consider the alternative dates as the more suitable timing for them to attend the Conference, we request their final preferred dates option before **November 19, 2021**.

The Marriott Hotel confirmed that there won't be any penalty fee for the postponement of the conference to the Fall, however, it should be noted as per the Cancellation Clause that a cancellation fee of approx. \$61,662.50 will apply should the conference be cancelled by November 19, 2021.

Strategic Plan 2022-2025

While the implementation of the first Strategic Plan (2016-2021) will be completed by the end of 2021, the CACB-CCCA is preparing for its second Strategic Plan (2022-2025) and has issued the Request for Proposals for a Strategy Planning Consultant. The Strategic Planning work is scheduled to include an in-person working session in November 2022.

CACB-CCCA designation as the Education Credential Assessment (ECA) organization for Architects

Bi-monthly and then Monthly meetings have been scheduled since January 2021 with Immigration, Refugees and Citizenship Canada (IRCC) team to work on the implementation timeline and requirements for the CACB-CCCA to be recognized as the sole Education Credential Assessment (ECA) organization for Architecture, within the Immigration Process for individuals looking to settle in Canada, with a launch target of Spring of 2022. The work is still ongoing regarding clarifications and customized CACB-CCCA amendments to the Service Agreement.

The 2020 version of the Canadian Education Standard (CES) effective in 2022

The implementation of the newly adopted and published version of the Canadian Education Standard (CES) by CALA in 2020 is delayed to 2022.

The CACB-CCCA has just recently learned about the new 2020 version of CES and immediately put in place a transition plan to manage the significant impact on its operations, as it will require IT development of the CRM system and online application, the updating of materials published to applicants, along with the training of staff and assessors.

CACB-CCCA Certification Programs accepted by the Saskatchewan Immigrant Nominee Program (SINP)

The CACB-CCCA has also recently learned that the Government of Saskatchewan has been accepting since 2017 both the BEFA Eligibility and Academic Certification outcomes for its Immigrant Nominee Program (SINP) requirements. An applicant to SINP Program is granted more immigration points after getting the BEFA Eligibility confirmed through the SINP Express Entry Program.

Now that the CACB-CCCA is aware of the SINP Requirements, there will more coordination between the CACB-CCCA and the SINP for the mutual benefits of the BEFA Program and for the SINP Applicants. This level of collaboration at the provincial level could be of interest for other jurisdictions.

BEFA Remote Interview Format in place

Following the CALA's approval of the Remote Interview Format, the CACB-CCCA has scheduled fifteen (15) interviews to take place between October 6th and November 12th with appropriate training and refresh sessions for both the candidates and the assessors.

As of October 27, 2021, nine (9) interviews have been completed.

We are pleased to report that the Assessors were ready and have performed successfully in the use of both the Remote Interview technology and the CACB-CCCA Shared Space.

More BEFA Assessors needed

Due to the pandemic, the BEFA Interviews were postponed. The Remote Interview format has allowed CACB-CCCA to resume Interviews, along with the assignment of BEFA Applicants submissions to available assessors. However, an increased number of applicants and the limit of file assignments per assessor (maximum two files) is a significant constraint which impact the application timeline and delay the process.

To curb the operational impact of the retirement of some assessors, and to avoid further backlogs and delays, the CACB-CCCA issued through the CALA Standing Committee in March 2021, a call for

Nomination for thirty (30) additional Assessors in which the needs per jurisdiction were identified in terms of the number, the diversity and the gender balance required.

The CACB-CCCA is developing a BEFA Operational Training Program, incorporating the lessons learned through the Remote Interview mock and pilot interviews, to be delivered in a hybrid model of in-person and virtual, to train the newly appointed assessors and may be used as refresher training sessions for those who have already been trained.

Template for Architecture Program Report (APR)

The Architecture Program report (APR) is submitted by the Program to the CACC-CCCA prior to hosting the accreditation visits. It consists of a self-analytical report that succinctly describes how the program's unique qualities and students' achievements satisfy the Conditions for Accreditation. The APR forms the basis for the visiting team to prepare for the site visit and evaluate the compliance of the evidence outlined in the report. The purpose of the APR template is to reduce the overall cost of the APR preparation and to achieve consistency in reporting across the Programs. The Project consists of a mandatory web-based form to be used both by the Architecture Programs and the Visiting Teams. The end result is a two-stage report that merges the previous APR and Visiting Team Report (VTR) documents into a single Accreditation Report (ACR). The CACB-CCCA has now completed the APR System project and it will be used for the upcoming accreditation visits.

Virtual Accreditation Site Visit procedures

To maintain its Accreditation Visit Cycle during COVID-19 pandemic, the CACB-CCCA has developed and approved in March 2021 the Requirements and Procedures for Virtual Visits 2021. The document was used as the reference for the 2021 virtual accreditation visits.

Support of the United Nations declaration on the Right of Indigenous People

The CACB Board of Directors is pleased to support of [the United Nations Declaration on the Rights of Indigenous Peoples](#). By adopting the UN Declaration on the Rights of Indigenous Peoples, together with [the Truth and Reconciliation Commission of Canada Calls to Action](#), the CACB joins in a symbolic and action-oriented journey toward justice and peace for indigenous peoples, architectural communities and future generations.

Participation in the Toronto Society of Architects (TSOA) information session

The CACB-CCCA has successfully participated in the information session held virtually by the Toronto Society of Architects on October. 27, 2021 for newcomers to Canada who are interested in getting their education or work experience assessed for certification towards licensure in Architecture. 112 attendees participated in this session representing 42 countries.

Targeted Audiences for our Newsletter

The CACB-CCCA has issued its September Newsletter edition and has adapted its content to the recipients. In our efforts to broaden our communications with our members and to help increase awareness about our services, programs, and organization, we would like to invite you to subscribe to our newsletter directly through our website www.cacb-ccca.ca.

Projects in development

Annual Report (AR) Platform

Similar to the previously mentioned APR project, a web-based platform for Annual Reports (AR) is planned for development. The AR project will combine in two consecutive stages, the APR (Architecture Program Report) and the VTR (Visiting Team Report). The project will be developed under the same architecture as the Annual Report platform and is scheduled for launch in Fall 2021.

Hybrid Accreditation Visit Model

Based on the 2021 experience, the CACB-CCCA Board has tasked the Training Committee to develop, by the Fall 2022, a hybrid model for the Accreditation Visits that will integrate both virtual and in-person procedures, such as Team-Room Preparation, Students Work Exhibit, and meeting with students, faculty and staff, to achieve cost effectiveness and alignment with the audit approach.

2- PROGRAMS STATISTICAL HIGHLIGHTS

2.1- ACCREDITATION PROGRAM

The CACB-CCCA Accreditation Program is an audit program based on the Conditions and Terms for Accreditation and the Procedures for Accreditation. It typically requires a self-evaluation on the part of the institution, followed by a site visit and review conducted by a team representing the CACB.

Since July 1st 2021, Canada counts [12 accredited programs in Architecture](#). All of them are master's degrees: Master of Architecture (M. Arch) and are offered at the following University Institutions:

- University of British Columbia;
- University of Calgary;
- Carleton University;
- Dalhousie University;
- Laurentian University;
- Université Laval;
- University of Manitoba;
- McGill University;
- Université de Montréal;
- Ryerson University; and
- University of Toronto.

Laurentian University McEwen School of Architecture M. Arch Program is the second architectural program, after Ryerson University M. Arch in 2010, to be granted Initial Accreditation since 1991.

Accreditation Visits

2021 Cycle:

Due to COVID-19, planned in-person visits in 2021 were held virtually according to the newly developed CACB-CCCA Virtual Visits Requirements and Procedures in March 2021:

- Maintenance Accreditation Visit to M. Arch /Université de Montréal, Montréal, QC: 6-year term of accreditation and;
- Initial Accreditation Visit to M. Arch / Laurentian University, Sudbury, ON: 3-year term of initial accreditation

2022 Cycle:

One Maintenance visit is planned in 2022 with the hope the COVID-19 condition by then will allow in-person visit: - Maintenance Accreditation Visit in to M. Arch / Dalhousie University, Halifax, NS.

The schedule of the upcoming Accreditation Visits is posted [here](#).

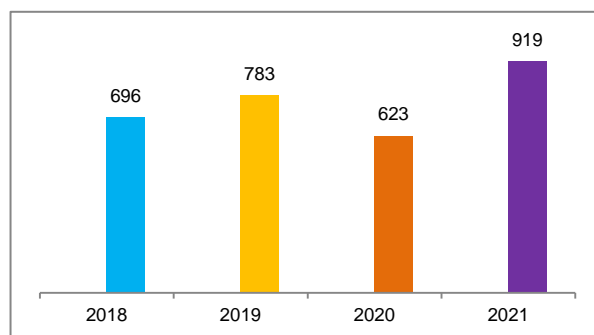
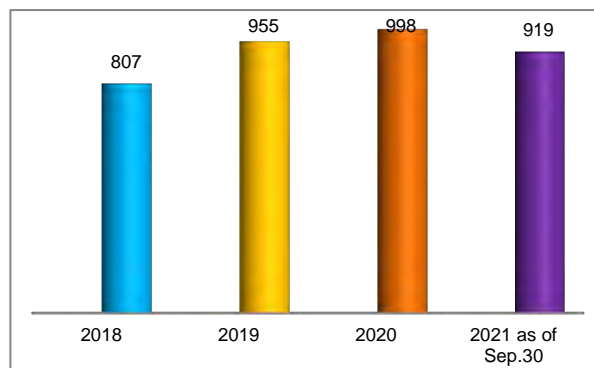
2.2-ACADEMIC CERTIFICATION PROGRAM

Applications Received

2020 figures show that COVID-19 didn't impact the demand for Academic Certification. Surprisingly, a total of 43 more application were received in comparison to 2019.

2021 figures, show that by the end of the year the total number of all modes of certification applications will be significantly higher than in 2020

In 2021, as of September 30th, a total of 919 applications were received. It is 32% more than in 2020 and 14% than in 2019.

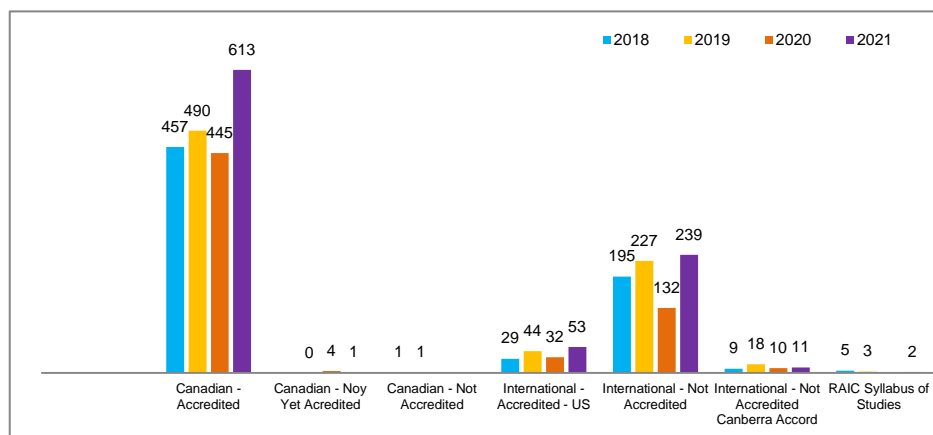
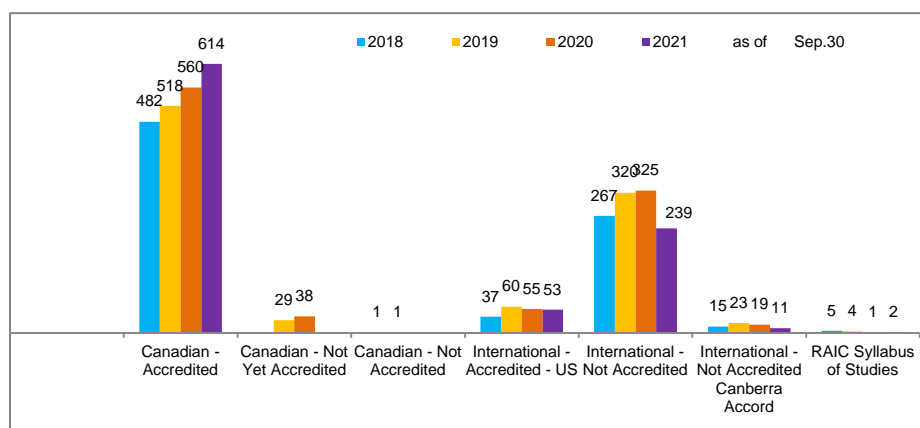


Total applications received as of September 30 of each year

The table on the right shows the total applications received by modes of certifications

The table below shows the total applications received by modes of certifications as of September 30th of each year.

Study increase in Canadian graduates and International graduates' applications over the years.



Country of Origin of Foreign Graduate Applicants

Iran (373), India (218), Egypt (120), and Syria (74) are the Top 4 countries of Origin out of all International Graduates Professional Architectural Degrees applications received between 2015 and 2021. All together (785), they form 41.46% of the total of all the other countries of origin (1893). The number of Syrian applicants has started increasing with the escalation of the civil war.

Total Applications Received	2015	2016	2017	2018	2019	2020	2021 as of Sep.30
All countries 1893	178	237	258	282	343	344	251
Top three countries of origin Iran: 373 India: 218 Egypt: 120 Syria:74	Iran: 35 Egypt: 16 India: 10 Syria: 4	Iran: 54 Egypt: 18 India: 17 Syria:8	Iran: 62 India: 22 Egypt: 16 Syria:8	Iran:51 India:33 Egypt:22 Syria:12	Iran:67 India:34 Egypt:24 Syria:22	Iran:66 India:53 Syria:20 Egypt: 12	India:49 Iran:38 Egypt: 12 Algeria:12

2.3- BEFA CERTIFICATION PROGRAM

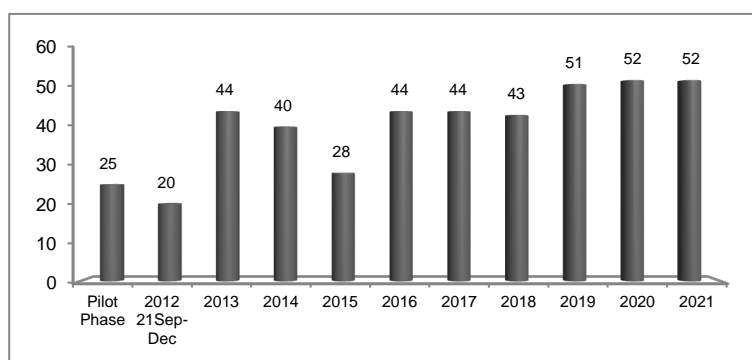
Applications Received

Since the implementation of the BEFA Program (including the Pilot Phase), a Grand Total of 443 applications has been received.

Similarly to Academic

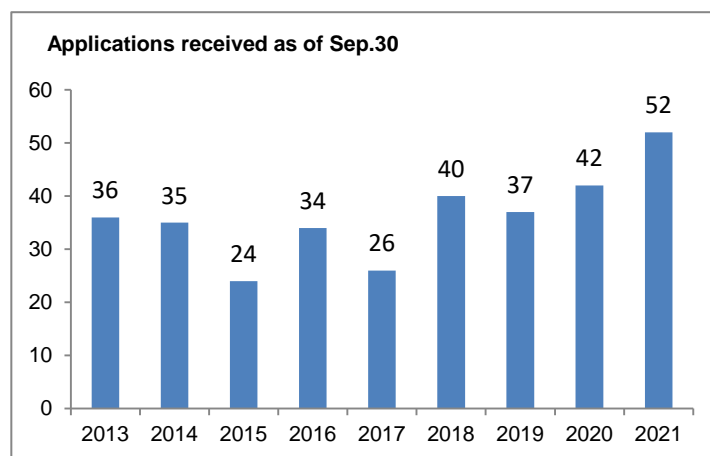
Certification, COVID-19 outbreak

didn't impact the number of new BEFA application. In 2020, we received 1 application more than in 2019.



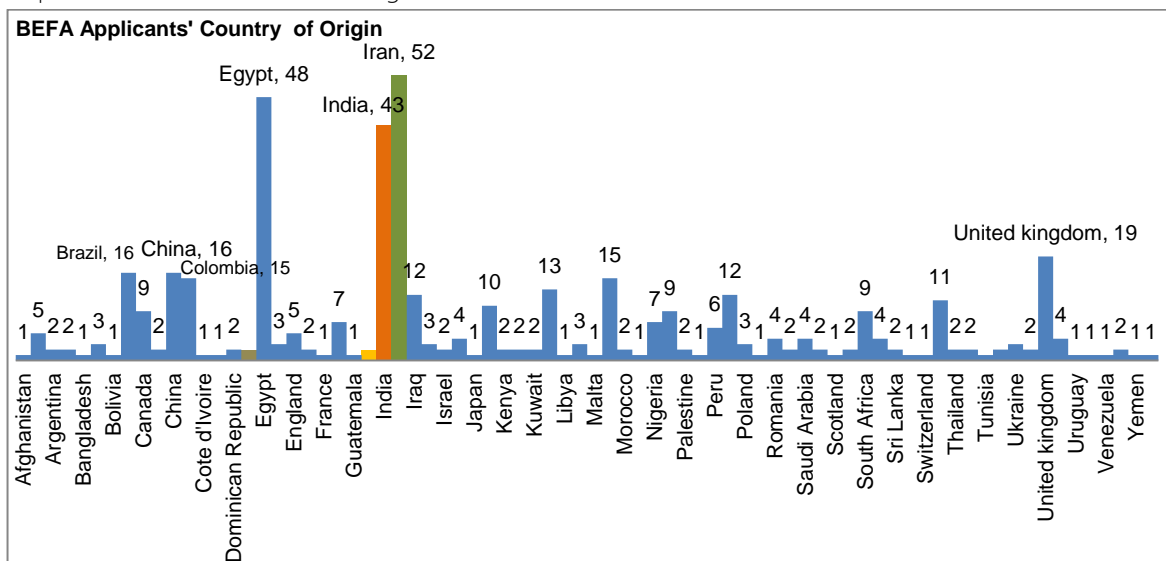
52 applications have been received as of September 30, 2021. This number equals the total number of applications received in 2020 and exceeds all previous years' total numbers.

In comparison to the same period of the precedent years (September 30th), 2021 figures suggest that by the end of 2021 we will receive more than 60 new applications, and so far it is the highest number of new application since the implementation of the BEFA Program.



Country of Origin of BEFA Applicants

Egypt, Iran, India, and United Kingdom are the Top 4 Countries of Origin received since the implementation of the BEFA Program:



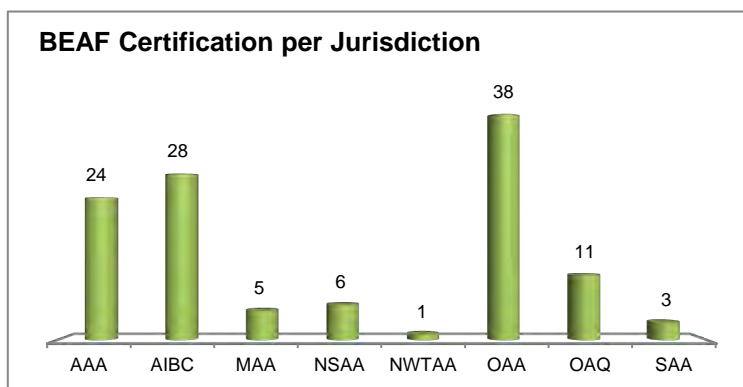
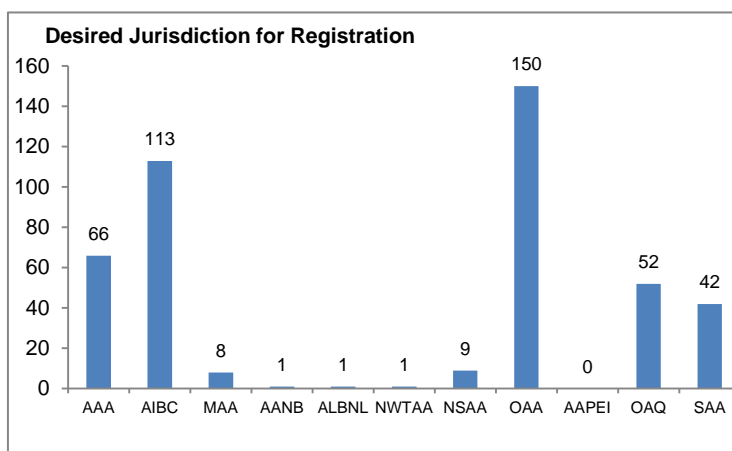
Jurisdiction to practice

Ontario, British Columbia, Alberta, Québec, and Saskatchewan are the most selected Jurisdiction by the applicants to register with.

Certification

A total of 115 applicants have been granted BEFA Certification as of May 31, 2021 with the following distribution:

- Ontario: 38;
- British Columbia: 28;
- Alberta: 24;
- Québec :11;
- Nova Scotia: 6;
- Manitoba: 5;
- Saskatchewan:3; and
- Northwest Territories: 1



Interview Sessions

15 Remote interviews are scheduled in the fall 2021 between October 6th and November 12th.

3-INTERNATIONAL INVOLVEMENT

THE CANBERRA ACCORD

The Canberra Accord consists of ten signatories that have substantial equivalent established accreditation systems for architectural education. Within the Accord, the signatories are also expected to facilitate among themselves the mobility of their graduates.

Signatories

- CACB-CCCA (Canadian Architectural Certification Board - Conseil canadien de certification en architecture) – Canada
- NBAA (National Board of Architectural Accreditation) – China
- CAA (Commonwealth Association of Architects)
- HKIA (Hong Kong Institute of Architecture) - Hong-Kong
- IEET (The Institute of Engineering Education Taiwan) - Taiwan
- KAAB (Korea Architectural Accrediting Board) - South Korea
- JABEE (Japan Accreditation Board for Engineering Education) - Japan
- ANPADEH (Acreditadora Nacional de Programas de Arquitectura y Disciplinas del Espacio Habitable) - Mexico
- SACAP (The South African Council for the Architectural Profession)
- NAAB (National Architectural Accrediting Board) – USA

Provisional Members

- UIA/UNESCO validation Council

Meetings

Similarly to the Interim meeting, The 8th General Meeting was held via Zoom platform on June 24-25, 2021. The next General meeting is planned to be in in-person format if the pandemic situation will allow that

Canberra Accord Implementation

The CACB-CCCA is the Chair of the Implementation Task Force tasked by the Accord to monitor the level of the graduates' mobility across the signatories by surveying the development and the implementation of appropriate procedures and assessment streams to that manner.

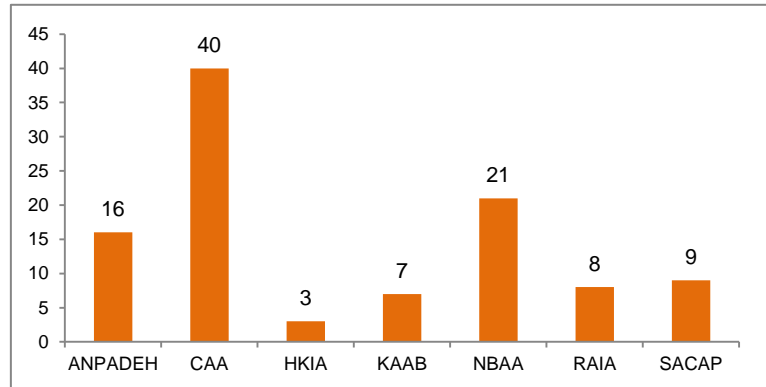
Comparative Analysis of Signatories Conditions and Procedures for Accreditation

The CACB-CCCA is member of the Comparative Analysis task Force which has undertaken the work of comparing against the Canberra Accord Rules and Procedures the level of compliance and equivalency of the Signatories' Conditions and Procedures. The result of the Task Force work will be presented at the upcoming General meeting.

Statistics Highlights

Since 2012, a total of 104 applications from Canberra Graduates have been processed with the following signatories' distribution:

- CAA: 40;
- NBAA: 21;
- ANPADEH: 13
- SACAP: 9;
- RAIA: 8
- KAAB: 7; and
- HKIA: 3



Canberra Accord graduates have expressed interest in registration with the following Regulators distribution:

- AIBC: 41
- OAA: 39
- AAA: 15
- OAQ: 5
- MAA: 1
- NWTAA: 1
- NSAA: 1; and
- SAA: 1

