



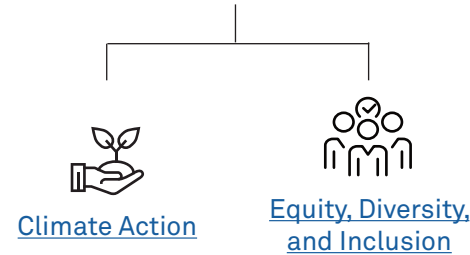
# VISION

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.

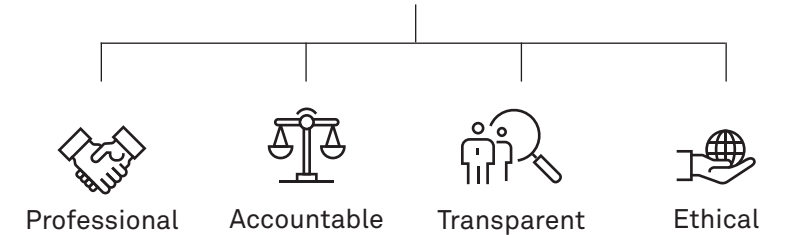
# MANDATE

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.

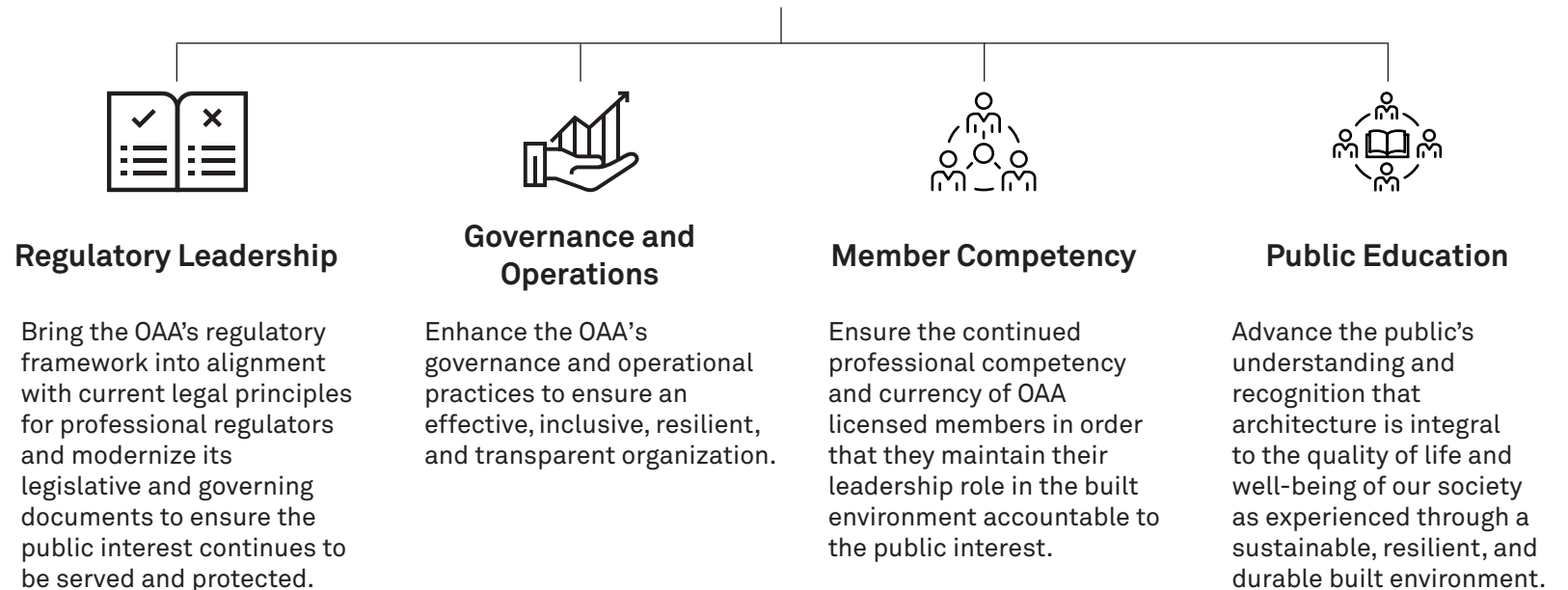
## Themes



## Values



## Strategic Priorities



### Regulatory Leadership

Bring the OAA's regulatory framework into alignment with current legal principles for professional regulators and modernize its legislative and governing documents to ensure the public interest continues to be served and protected.

### Governance and Operations

Enhance the OAA's governance and operational practices to ensure an effective, inclusive, resilient, and transparent organization.

### Member Competency

Ensure the continued professional competency and currency of OAA licensed members in order that they maintain their leadership role in the built environment accountable to the public interest.

### Public Education

Advance the public's understanding and recognition that architecture is integral to the quality of life and well-being of our society as experienced through a sustainable, resilient, and durable built environment.



**Regulatory Leadership**

**Governance and Operations**

**Member Competency**

**Public Education**

**Goal Statements**

Bring the OAA's regulatory framework into alignment with current legal principles for professional regulators and modernize its legislative and governing documents to ensure the public interest continues to be served and protected.

Enhance the OAA's governance and operational practices to ensure an effective, inclusive, resilient, and transparent organization.

Ensure the continued professional competency and currency of OAA licensed members in order that they maintain their leadership role in the built environment accountable to the public interest.

Advance the public's understanding and recognition that architecture is integral to the quality of life and well-being of our society as experienced through a sustainable, resilient, and durable built environment.

**Strategic Priorities**

- Actively engage with government, legal counsel, and the Attorney General to advance the modernization of the *Architects Act* and its Regulation.
- Increase transparency, fairness, objectivity, and impartiality of OAA registration and regulatory processes.
- Continue to serve the public interest through ongoing enforcement activities and investigating breaches of the *Architects Act* and its Regulations.
- Continue to invest in programs and activities that contribute to and foster the diversity and perspective of new applicants to the architectural profession.

- Continue to implement the operational review recommendations, which include clearly defined roles for Council & staff, additional organizational policies and structures, enhanced IT and data management, enhanced risk management, continued investment in equity, diversity, and inclusion, and ensuring a safe workplace.
- Monitor OAA governance reforms and continue to update Council governance practices to align with best practices of professional regulators.
- Continue to develop, implement and monitor the futureproofing strategy for OAA internal resources to be agile and resilient.

- Administer the legislative requirements of mandatory continuing education through the established program framework.
- Anticipate and respond to current disruptions and trends in the industry (e.g. different project delivery methods, climate stability, accessibility, and technological advancements) as well as legislative changes (e.g. harmonization of building codes and accessibility) through various continuing education offerings.
- Provide information in a responsive manner to members that is relevant and timely regarding OAA education resources, as well as programs and services existing elsewhere that fall outside the purview of the OAA.

- Implement the Council approved Public Outreach Plan to educate the public about the role of architecture in creating the built environment and its impact on society.
- Continue education initiatives to foster a greater understanding of the OAA as a unique professional self-regulator.
- Leverage and support programs and services offered by other parties in the built environment to further the public appreciation of architecture and the allied arts.
- Continue education regarding best practices in project delivery that relate to regulatory responsibilities of OAA members and practices, inclusive of procurement, in order that the public interest may continue to be served and protected.

**Metrics**

- A strategy for modernizing the Act and Regulations has been created and implemented.
- The OAA's regulatory standards, policies, and procedures are current and consistent with the right-touch regulatory approach.
- The OAA continues to identify and correct regulatory misalignments.
- The OAA continues to be in compliance with the Office of the Fairness Commissioner and other government oversight bodies.
- There is a clearer understanding of the path to licensure and a greater connection with those on the path to licensure.
- The OAA's periodic Demographic Survey demonstrates a shift towards increased equity, diversity, and inclusion.

- The 39 Operational Review recommendations are implemented.
- Roles and responsibilities of OAA staff, committees, and Council are defined and documented.
- The OAA's risk assessment metrics are implemented.
- Staff retention remains high.
- Participation and representation in Council elections is improved.
- Best-practice gaps in governance relative to professional regulatory organization benchmarks have been identified, prioritized, implemented and measured

- Member competency and ethical practice continues to develop and is responsive relative to the industry and profession.
- The content of the OAA's educational offerings is focused on technical and legislative content that is current and relevant.
- Access to competency development-based education is diversified and equitable.
- Increased member use of the OAA webpages on learning opportunities outside of the OAA.
- Increased member use of the OAA webpages with the existing OAA Documents and resources as well as Practice Advisory Knowledge Base area.

- Members demonstrate a clear understanding of the role of the OAA as a regulator and of the extent to which it can promote the public appreciation of architecture.
- The OAA has developed and implemented a defined program of public education that responds to our mandate and that is sustainable over time.
- The number of times government and other partners/parties have invited the OAA to engage/inform on built environment issues in the public interest has increased.

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## Operational Procedures

Procedure Reference **OAA Council Meetings – Rules and Procedures**

Issue Date **November 29, 2023**

Revision Dates

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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 Manual, unless stipulated otherwise with the by-laws or as otherwise approved by OAA Council. The following operational procedures outline the rules and procedures for discussion, debate and motions within Council meetings:

- The maximum time for a Councillor's comments in debate on a motion is two minutes.
- 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 Councillor's intention to speak by raising their hand; and
  - b) any Councillor having not spoken to an item/motion shall be given preference on the speakers' list over any Councillor who has already spoken.
- 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. Otherwise all other motions are to be contained within the individual reports to Council, unless a motion for an item that is "*For Discussion*" has yet to be identified.
- 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.
- The meeting will move to a period of informal discussion immediately after a new item has been presented and a main motion on the item is introduced and any questions on the item have been put and answered, ; and
  - a) a period of informal discussion is defined as the opportunity to discuss an item with the 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, Council will be asked to vote on the motion

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 January 23, 2025 at approx. 11:00 a.m.**

**Meeting # 297**

**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 December 6, 2024 Open Council Meeting (*see attached*)
- 2 mins    **3.0    BUSINESS ARISING FROM THE MINUTES**
- 4.0    ITEMS FOR REVIEW AND APPROVAL**
- 20 mins    4.1    Election of Officers (*oral*) Registrar
- 5 mins    4.2    2025 Budget Canadian Architectural Certification Board (*see attached*) Executive Director  
*It was moved by... and second by ... that Council approve the 2025 CACB budget version 3 as presented to Council on January 23, 2025.*
- 5 mins    4.3    Amendments to OAA Bylaws and Schedule A re. Limited Licences (*see attached*) Executive Director  
*It was moved by ... and seconded by .... that the proposed amendments to the OAA Bylaws and Schedule A under the OAA Bylaws be approved as circulated reflecting the inclusion of holders of a Limited Licence and Intern Technologists*
- 5 mins    4.4    Updates to Practice Tip PT.23.6 Design-Build: CCDC 14-2013 and PT.23.7 Design-Build: CCDC 15-2013 (*see attached*) VP Schuhmann  
*It was moved by Schuhmann and seconded by .... That Council to endorse the revised OAA Practice Tip PT. 23.6 Design-Build: CCDC 14-2013 and PT. 23.7 Design-Build: CCDC 15-2013 as presented to Council on January 23*
- 5.0    ITEMS FOR DISCUSSION**
- 6.0    REPORTS**
- 2 mins    6.1    Report from the President – Activities for the months of December-January (*see attached*) President
- 2 mins    6.2    Report from the Senior Vice President and Treasurer (*oral*) SVP & Treasurer
- 2 mins    6.3    Report from the Executive Director (*see attached*) Executive Director
- 2 mins    6.4    Report from the Registrar (*see attached*) Registrar
- 6.5    Committee Reports Committee Chairs
- 1 min    6.5.a    Communications & Public Education Committee – Update (*see attached*) VP McKendrick
- 1 min    6.5.b    Governance & HR Committee - Update (*see attached*) SVP & Treasurer
- 1 min    6.5.c    OAA Building Committee- Update and Report re. OAA Landscape Project (*see attached*) VP McKendrick

*Open Council Agenda*

1 min

6.5.d Practice Resource Committee (PRC) – Update (*see attached*)

VP Schuhmann

1 min

6.5.e Policy Advisory Consultation Team (PACT) – Update (*see attached*)

VP Spiegel

**7.0 ITEMS FOR INFORMATION**

7.1 OAA Service Area Semi-Annual Updates

7.1.a Communications (*see attached*)

7.1.b Continuing Education (*see attached*)

7.1.c Finance (*see attached*)

7.1.d Human Resources (*see attached*)

7.1.e Information Technology (*see attached*)

7.1.f Policy and Government Relations (*see attached*)

7.1.g Practice Advisory Services (*see attached*)

7.2 Conference 2025 Update (*see attached*)

Manager, Finance

**8.0 OTHER BUSINESS**

**9.0 DATE OF NEXT MEETING**

9.1 The next regular meeting of Council is Thursday March 6, 2025 at 9:30 a.m. at the OAA Headquarters, Toronto, Ontario.

**10.0 ADJOURNMENT**

## Ontario Association of Architects

Meeting #296 Open

MINUTES

December 6, 2024

The two hundred and ninety sixth meeting of the Council of the Ontario Association of Architects, held under the *Architects Act*, took place on Friday December 6, 2024 at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario and virtually via Zoom.

<b>Present:</b>	Settimo Vilardi	President
	Ted Wilson	Senior Vice President and Treasurer
	Lara McKendrick	Vice President
	Kristiana Schuhmann	Vice President
	Susan Speigel	Vice President
	Loloa Alkasawat	Councillor
	J. William Birdsell	Councillor ( <i>virtual</i> )
	Jim Buttici	Lieutenant Governor in Council Appointee ( <i>virtual</i> )
	Christina Karney	Councillor
	Jenny Lafrance	Councillor
	Michelle Longlade	Lieutenant Governor in Council Appointee
	Elaine Mintz	Lieutenant Governor in Council Appointee
	Greg Redden	Councillor
	Anna Richter	Councillor
	Ted Watson	Councillor
	Thomas Yeung	Councillor
Kristi Doyle	Executive Director	
Christie Mills	Registrar	
Tina Carfa	Executive Assistant, Executive Services	
Erik Missio	Communications Manager ( <i>virtual</i> )	
<b>Regrets:</b>	Kimberly Fawcett-Smith	Lieutenant Governor in Council Appointee
	Natasha Krickhan	Councillor
	Marek Zawadzki	Councillor ( <i>virtual</i> )
<b>Guests:</b>	Donald Ardiel	Incoming Councillor
	Deo Paquette	Incoming Councillor ( <i>virtual</i> )
	Joe Lobko	Professional Advisor for OAA Landscape Design Project ( <i>part attendance</i> )
	Kathy Armbrust	COO
	Melanie Walsh	Manager, Finance ( <i>part attendance</i> )

The President called the meeting to order at 11:20 a.m.

The President noted that a land acknowledgement titled *Indigenous Architecture with Alfred Waugh / From Earth to Sky* would be shared with Council as an acknowledgement and recognition of the Indigenous land and its people.

The President welcomed staff and members in attendance at the meeting. Incoming Councillors Donald Ardiel and Deo Paquette were congratulated on their election and welcomed to the meeting.

**DECLARATION RE CONFLICT OF INTEREST**

The President called for declaration of any conflicts of interest.

No conflicts of interest were declared.

## **AGENDA APPROVAL**

9818. The President reported that the item regarding appointments to the Interns Committee has been deferred and removed from the agenda.

**It was moved by Mintz and seconded by Longlade that the agenda for the December 6, 2024 open meeting be approved as amended.**

-- CARRIED

## **APPROVAL OF MINUTES**

9819. *Reference Material Reviewed:* Draft minutes of the September 19, 2024 Open Council meeting.

The draft minutes of the September 19, 2024 Open Council meeting were reviewed.

The following amendments were suggested by a member of Council.

On page 1 of 10 of the minutes the word "Architects" was spelled incorrectly and should read:

Ana-Francisca de la Mora Chair, Toronto Society of Architects

On page 8 of 10 that the paragraph below:

A member of Council stated that the CACB should consider an appropriate appointment system for members to its writing committee to ensure transparency to the members through ROAC. It is important as this is how programs are now evaluated

Doyle responded that CACB will be providing a report to ROAC at its October meeting where the question can be asked. It was noted that it is an approval process for appointment.

The Councillor suggested that the application process for the committee be the same as that for Directors.

be replaced with:

A Councillor requested that, at the upcoming ROAC meeting, the OAA propose that ROAC require greater transparency of the process of appointing members to the CACB writing committee, which is assembled to draft the terms of accreditation for architecture schools in Canada every 4-5 years; and, that it consider a transparent process whereby CACB members (ROAC and CCUSA) nominate appointees directly to the CACB Writing Committee."

The Councillor suggested that the application process for the writing committee be the similar to that for Directors.

On page 8 of 10 under the report from the Registrar, before "The report was noted for information." Add:

A Councillor commented on the reducing ratio of certificates of practice issued to the number of new licenses; that is, it appears that far fewer new firms are being established despite the growing number of newly licensed architects.

The Councillor suggested that the application process for the committee be the same as that for Directors.



**It was moved by Richter and seconded by McKendrick that the minutes of the September 19, 2024 Open Council meeting be approved as amended.**

-- CARRIED

#### **BUSINESS ARISING FROM THE MINUTES**

9820. There was no business arising from the minutes.

#### **ITEMS FOR REVIEW AND APPROVAL**

9821. OAA Draft 2025 Operating and Capital Budget (*oral*)

The draft 2025 Operating and Capital Budget was reviewed by Council.

**It was moved by Wilson and seconded by Butticci that Council approve the 2025 draft operating and capital budgets as presented on December 6, 2024.**

-- CARRIED

9822. *Reference Materials Reviewed:* Memorandum from Executive Director, Kristi Doyle dated November 24, 2024 re. Amendment to OAA Bylaws and Schedule A to the Bylaws and attached supporting documentation. **(APPENDIX 'A')**

Doyle reported.

A member of Council noted a minor error in the date of the memorandum which should read November 24, 2024.

**It was moved by Wilson and seconded by Spiegel that Council amend the OAA Bylaw to add to section 7. Duties of Members of Council the following: (m) comply with all applicable workplace laws and policies.**

-- CARRIED

**It was moved by Wilson and seconded by McKendrick that Schedule A to the OAA Bylaws be approved as circulated reflecting an increase in fees of 2.7% for 2025.**

-- CARRIED

9823. Appointments to Complaints Committee (*oral*)

The report was reviewed by Council.

**It was moved by Richter and seconded by Redden that Council approve the reappointment of Ibrahim El-Hajj and Tzoliné Ternamaian to the Complaints Committee for a three-year term, effective January 1, 2025**

-- CARRIED

**It was moved by Richter and seconded by Redden that Council approve the appointment of Giulia Qejvani and Limor Benmor-Mizrahi to the Complaints Committee for a three-year term, effective January 1, 2025.**

-- CARRIED

**It was moved by Redden and seconded by McKendrick that Council approve the reappointment of Toon Dreesen for a one-year term as Chair of the Complaints Committee for 2025.**

-- CARRIED

9823. Appointments to Discipline Committee (*oral*)

Councillor and Chair of the Discipline Committee, Bill Birdsell reported.

**It was moved by Birdsell and seconded by Longlade that Council approve the reappointment of Adam Thom, Izabela Kazanczuk, James Anderson, Peter Turner and Vincent Alcaide to the Discipline Committee for a 3-year term, effective January 1, 2025.**

-- CARRIED

9824. Appointments to Experience Requirements Committee (*oral*)

Councillor and Chair of the Experience Requirements Committee, Anna Richter reported.

**It was moved by Richter and seconded by Longlade that Council approve the appointment of Christopher Montgomery and reappointment of Emily Webster Mason to the Experience Requirements Committee for a three-year term.**

-- CARRIED

9825. Appointments to Registration Committee (*oral*)

Councillor and Chair of the Discipline Committee, Bill Birdsell reported.

**It was moved by Birdsell and seconded by Mintz that Council approve the appointment of Ryan Cyrus and the reappointment of Christopher Montgomery to the Registration Committee for a 3-year term, effective January 1, 2025**

-- CARRIED

9826. Appointments to Policy Advisory Coordination Team (PACT) (*oral*)

Vice President Speigel reported.

**It was moved by Speigel and seconded by Mintz that Council approve the appointment of Mary Ellen Lynch and Sara Jordao to the Policy Advisory Coordination Team for a 3-year term, effective January 1, 2025.**

-- CARRIED

9827. Appointments to Practice Resource Committee (PRC) (*oral*)

Vice President Schuhmann reported.

**It was moved by Schuhmann and seconded by Longlade that Council approve the re-appointment of John Ciarmela for a second 3-year term and the appointment of Heather Asquith and Tamara Hains for a 3-year term to the Practice Resource Committee effective January 1, 2025.**

-- CARRIED

9828. *Reference Materials Reviewed:* Memorandum from Registrar, Christie Mills dated November 14, 2024 re. Appointment of Life Members. (**APPENDIX 'B'**)

Mills reported.

**It was moved by Longlade and seconded by Redden that the following Architects be appointed Life Members:**

**Pier Paolo Alberghini  
Kwok C. Au  
Robert E. Barnett**

**Hans D.E. Krause  
Barry H. Martin  
J. David McAuley**

Raymond Waiman Chung	Gordon A. Mezzomo
Shaun Douglas Clancey	Riccardo G. Mocellin
Richard O. Coombs	W. Michael Muller
Robert J. Crothers	Peter Pascaris
Elizabeth Davidson	Anthony B. Pearson
Daniel N.K. Gaito	Trevor Pereira
D. Brian Gregersen	Stephen Propst
G. Michael Grunsky	David C. Rich
William F. Heartwell	Eric J. Ritchie
Jurgen H. Henze	Gordon B. Robinson
Bruce R. Hinds	Edward Russell
Jon F. Hobbs	Viateur C. St. Pierre
Charles Ip	Eric C. Wormsbecker
Harold Kelman	

-- CARRIED

9829. *Reference Materials Reviewed:* Memorandum from Registrar, Christie Mills dated November 14, 2024 re. Recognition of Architects of Long Standing. **(APPENDIX 'D')**

Mills reported

**It was moved by Richter and seconded by McKendrick that the following architects be recognized as Long Standing Members:**

Joseph Somfay	Slobodan Vlahovich
Aleksandar Milenov	Denis G. Rioux
Peter F. Turner	Charles G. Bunker

-- CARRIED

9830. *Reference Materials Reviewed:* Memorandum from Continuing Education Advisory Committee dated November 27, 2024 re. Report on the Call for Presenters for the OAA Conference 2025 and attached background information. **(APPENDIX 'D')**

A member of Council enquired as to whether experiential learning will be included in the roster.

It was noted that the list includes experiential learning, however recreational tours will no longer be offered. The focus is on structured learning.

It was suggested by a Councillor that the roster is of high quality content, notwithstanding the reduction in the number of courses offered.

**It was moved by Karney and seconded by Watson that Council approve the proposed roster of Continuing Education for the OAA Conference 2025 as recommended by the Continuing Education Advisory Committee subject to minor changes based on speaker availability and budget.**

-- CARRIED

9831. *Reference Materials Reviewed:* Memorandum from Vice President, Lara McKendrick dated November 14, 2024 re. OAA 2025 Conference: Virtual Keynote Recommendation and attached background information. **(APPENDIX 'E')**

Vice President McKendrick reported.

**It was moved by McKendrick and seconded by Mintz that Council approve the Communications Committee's recommendation of Larry Beasley as the virtual keynote speaker to kick off 2025 Conference registration.**

-- CARRIED

9832. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated November 22, 2024 re. Policy Enforcement – Use of Designation ‘OAA’ and attached supporting documentation. **(APPENDIX ‘F’)**

Doyle reported that there is a minor amendment suggested to the policy where the OAA is ‘consenting’ to use of the official mark, replacing ‘licensing’. This change was noted by members of Council.

**It was moved by McKendrick and seconded by Longlade the Council direct to the Executive Director to enforce the Council Policy – Use of the Designation OAA and minor amendment as recommended to Council in the report from the Executive Director dated November 22, 2024**

-- CARRIED

9833. *Reference Material Reviewed:* Memorandum from Executive Director, Kristi Doyle dated November 22, 2024 re. Delegation of Authority Policy and attached supporting documentation. **(APPENDIX ‘G’)**

Doyle reported that the policy is one of the final outstanding recommendations of the 2021 operational review recommendations. A question was posed as to whether there was a contradiction between the signing authorities and the authority to authorize expenses. Doyle noted that the banking authorities are directly related to the signing of cheques and authorizing e-payments for release. Authorizing expenditures entails approval to move forward with a specific purchase expense. Doyle added that the OAA has moved further finance elements over to an on-line process as a result of the postal strike. This had been contemplated for 2025 regardless.

A Councillor noted that the policy is presented well in placing all of the authorities and processes into a single document.

**It was moved by Mintz and seconded by Longlade that Council approve the Council Policy – Delegation of Authority as presented to Council on December 6, 2024.**

-- CARRIED

9834. *Reference Material Reviewed:* Memorandum from Registrar, Christie Mills dated November 19, 2024 re. Updated Regulatory Notices and attached supporting documentation. **(APPENDIX ‘H’)**

Mills reported.

A Councillor enquired as to the reason the reference to trust provisions was removed from RN4.

Mills responded the Regulatory Notices have been updated to focus on the OAA’s jurisdiction and authority and content that ties directly to the professional obligations in the Act or regs. Legal counsel recommended that any content outside of the OAA’ authority should be removed.

The Councillor requested data with respect to bankruptcies in 2018, and 2019 to 2024 from the Registrar.

Mills responded that she has no recall of a bankruptcy declared during her time with the OAA.

**It was moved by Schuhmann and seconded by Speigel that Council approve the updates to the OAA Regulatory Notices and that they be published and issued for January 1, 2025.**

-- CARRIED

9834. *Reference Material Reviewed:* Memorandum from the Governance Committee dated November 26, 2024 re. Updated Regulatory Notice RN.01 and Document Digital Authentication and attached background information. **(APPENDIX ‘I’)**

Mills reported.

A member of Council suggested on page 2 of the RN1 notice that “issued for construction” be added to the statement “addenda, and drawings accompanying change orders, change directives, and site instructions.”

A Council member noted that construction encompasses all of the items listed and therefore it should be implicit. The Council agreed to add those words for clarity.

**It was moved by Wilson and seconded by Speigel that Council approve the update to Regulatory Notice RN.01 as presented and amended to Council on December 6, 2024.**

-- CARRIED

9835. *Reference Material Reviewed:* Memorandum from Governance Committee dated November 11, 2024 re. Policy considerations re. Supervising Architect eligibility in the IAP and attached supporting documentation. **(APPENDIX ‘J’)**

A Councillor enquired as to whether it is possible for an Intern Architect to gain all of their experience in the employ of a limited licence holder.

Mills responded that if an Intern Architect completes their experience under a limited licence holder they could meet diversification requirement as there only needs to be experience in two occupancies which is possible within that context.

A Council member enquired as to how experience is gained under the supervision of a limited licence holder.

Mills responded that limited licence holders could supervise experience under the terms and scope of their own practice.

The President agreed to call the question, however noted there were considerable discussion that could be addressed through additional information provided to Council. It was suggested that Governance Committee be asked to respond further to those questions.

**It was moved by Longlade and seconded by Schuhmann that Council approve the recommendation from the Governance Committee to allow limited licence holders to be eligible to act as Supervising Architects in the Internship in Architecture Program.**

-- DEFEATED (6 in favour, 9 opposed)

**Action:** Noting the questions that arose, Governance Committee was directed by Council to review the eligibility of Supervising Architects in the IAP and provide its recommendations to Council at its January 23, 2025 meeting.

Council broke at 12:10 p.m. for lunch and resumed at 12:50 p.m.

9836. *Reference Material Reviewed:* Memorandum from Deputy Registrar, Claire Hepburn dated October 23, 2024 re. Consideration of Toronto Society of Architects Delegation Request - Amendment to Learning Category for Continuing Education (ConEd) Program and attached supporting documentation. **(APPENDIX ‘K’)**

The report was reviewed by Council.

**It was moved by Alkasawat and seconded by Longlade that Council approve the Expansion of the definition of In-Person Learning, under the Structured Learning hours for the OAA’s ConEd Program, to include tours offered by OAA Local Architectural Societies.**

-- CARRIED

Doyle noted that OAA staff will communicate Council's decision with the Society Chairs.

9837. *Reference Material Reviewed:* Memorandum from the Governance Committee dated November 25, 2024 re. Respectful Work Policy for Members of Council and attached supporting documentation. **(APPENDIX 'L')**

Council reviewed the report.

**It was moved by Spiegel and seconded by Longlade that Council approve the updates to the Respectful Work Policy for Members as presented to Council on December 6, 2024.**

-- CARRIED

9838. *Reference Material Reviewed:* Memorandum from the Governance Committee dated November 25, 2024 re. Compliance with Duties of Members of Council and attached supporting documentation. **(APPENDIX 'M')**

Council reviewed the report.

A Council member enquired as to the reason that a formal investigation would only go to Executive Committee as opposed to informal.

Armbrust responded that confidentiality is paramount in such investigations. In cases of an informal investigation, a resolution is typically found between the two parties.

**It was moved by Spiegel and seconded by Longlade that Council approve the updates to the Respectful Work Policy for Members of Council as presented to Council on December 6, 2024.**

-- CARRIED

## **ITEMS FOR DISCUSSION**

9839. There were no items for discussion.

## **EXECUTIVE COMMITTEE REPORTS**

9840. *Reference Material Reviewed:* President's Activities for the months of September to December. **(APPENDIX 'N')**

The President reported that the local Society visits to date have been well received with two remaining.

A member of Council enquired as to what type of feedback has been received to date.

The President responded that there was positive feedback with the in person connection.

A Councillor noted that they also received positive feedback from the Society Chairs.

It was noted that Sudbury in particular had a large number of interns and students in attendance.

The report was noted for information.

9841. *Reference Material Reviewed:* Report from Executive Director, Kristi Doyle dated November 26, 2024 re. Executive Director Report to Council. **(APPENDIX 'O')**

A Councillor suggested that consideration be made to include staff names on the website.

Doyle responded that staff may request that their picture is not added to the website. Due to previous issues which Council is aware of, not all staff may be viewed.

The report was noted for information.

9842. *Reference Material Reviewed:* Memorandum from Registrar, Christie Mills re. Office of the Registrar Statistical Report to Council for the period September 4 to November 19, 2024. **(APPENDIX 'P')**

The report was noted for information.

9843. *Reference Material Reviewed:* Memorandum from Communications and Public Education Committee (CPEC) dated November 14, 2024 re. CPEC Updates. **(APPENDIX 'Q')**

The report was noted for information.

9844. *Reference Material Reviewed:* Memorandum from Governance Committee dated November 25, 2024 re. Update from OAA Governance Committee. **(APPENDIX 'R')**

The report was noted for information.

9845. *Reference Material Reviewed:* Memorandum from OAA Building Committee dated November 20, 2024 re. Practice Resource Committee (PRC) Update. **(APPENDIX 'S')**

Professional Advisor for the OAA Landscape Design Project, Joe Lobko joined the meeting at 1:00 p.m. The President welcomed Lobko to the meeting.

Lobko made a presentation on the OAA Landscape Project to date and next steps. Lobko's detailed update and presentation was included in the Council package including the details of the refinements to the design.

It was reported by Lobko that the Construction Manager/General Contractor will be engaged shortly based on Council's approval. He and Armbrust have created a comprehensive tracking of the progress and list to summarize feedback received during the schematic design refinement. A series of meetings have been organized and are underway to ensure the project continues to move forward.

It was noted by Lobko that two minor variances are required. One pertains to parking, the other variance pertains to the erection of porous open grate bridge/driveway.

It was noted by Lobko that the site plan agreement did not require a TRCA permit in the process. The project is not classified as development and therefore should not require site plan approval.

A Councillor noted the undeveloped mound in the back of the building and suggested that the school may be included to allow for an educational opportunity in its preservation or development.

It was noted by a member of Council that the AODA may not permit walking surfaces constructed of wood due to neck issues. The Councillor also noted that retention of funds for ongoing maintenance may be difficult and should be considered.

Clarification was requested by a Council member with regards to the accessible walkway as to whether it will be sloped slightly as well as employing the use of glycol to melt ice.

Lobko responded that the degree of slope will be discussed with the team. The use of glycol would need to be considered in the context of the budget.

A Councillor provided some commentary on the project;

- The pedestrian area from where parked to the front door is a deficit;
- Meadow Wall – concern that the height will make it difficult to read;
- Entrance Wall – appears to be an opportunity to dress up;
- Suggested that instead of losing 4 parking spaces from the north side, remove from south side, thereby allowing for an accessible pathway.

Lobko noted that with respect to the Exhibit Wall, the interpretations are meant to be on the rail. Suggestions will be brought back to the group.

It was noted by Lobko that the Project Manager, Ja Architecture has been a great collaboration as the group is talented and welcome to feedback.

It was suggested by a Council member that fixed seating may be a barrier and suggested an alternative.

Lobko responded that the possibility of moveable seating is being investigated.

The President thanked Lobko for his presentation.

Lobko left the meeting at 1:45 p.m.

9846. *Reference Material Reviewed:* Memorandum from Practice Resource Committee (PRC) dated September 4, 2024 re. Practice Resource Committee (PRC) Update. **(APPENDIX ‘T’)**

Doyle noted that PAS has been working with the Code advisory group in preparing an OAA response to the latest code consultation, as noted in the memo. The draft submission has been completed and will be circulated to Council for feedback. The deadline for submission is December 19.

The report was noted for information.

9847. *Reference Material Reviewed:* Memorandum from Vice President, Susan Speigel dated November 26, 2024 re. Update on the Policy Advisory Coordination Team’s (PACT) work. **(APPENDIX ‘U’)**

The report was noted for information.

9848. *Reference Material Reviewed:* Memorandum from the Interns Committee dated November 21, 2024 re. Interns Committee - Update. **(APPENDIX ‘V’)**

The report was noted for information.

## **ITEMS FOR INFORMATION**

9849. *Reference Material Reviewed:* Agendas from the Regulatory Organizations of Architecture in Canada (ROAC) meetings of October 18-19, 2024, Toronto. **(APPENDIX ‘W’)**

The report was noted for information.

9850. *Reference Material Reviewed:* Canadian Architectural Certification Board (CACB) Semi-annual report dated October 9, 2024. **(APPENDIX ‘X’)**

A member of Council remarked that the letter from CACB President, Lisa Landrum was well written and included positive suggestions.



The report was noted for information.

9852. *Reference Material Reviewed:* Memorandum from Vice President, Kristiana Schuhmann dated November 27, 2024 re. OAA Document Maintenance - Practice Tips Impacted by OBC 2024 and supporting background documentation. **(APPENDIX ‘Y’)**

The report was noted for information.

### **OTHER BUSINESS**

9853. The President thanked outgoing Councillors Karney and Redden on behalf of Council for their hard work and support during their tenure on Council and spoke about each one’s accomplishments and reflecting on their time on Council.

### **DATE OF NEXT MEETING**

9854. The next regular meeting of Council is Thursday January 23, 2025 at 9:30 a.m. at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario.

The OAA Strategic Plan Review & Council Governance Workshop is scheduled following the Council meeting on Thursday January 23, 2025 3:00 p.m. – 6:00 p.m. and Friday January 24, 2025 9:00 a.m. – 3:00 p.m. at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario. It was noted that the session will be held in person only.

### **ADJOURNMENT**

9855. **It was moved by Mintz and seconded by Redden that the meeting be adjourned at 1:50 p.m.**  
-- CARRIED UNANIMOUSLY

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President

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Date

# Memorandum

**To:** Council

Settimo Vilardi	Loloa Alkasawat
J. William Birdsell	Donald Ardiel
Kimberly Fawcett-Smith	Jim Butticci
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Spiegel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING

January 23, 2025

(open)

ITEM: 4.2

**From:** Kristi Doyle, Executive Director

**Date:** January 13, 2025

**Subject:** 2025 Canadian Architectural Certification Board (CACB) Budget

**Objective:** Council to review and approve the 2025 budget for the Canadian Architectural Certification Board (CACB).

The CACB is the sole organization recognized by the architectural profession in Canada to assess the educational qualifications of architecture graduates and to accredit professional degree programs in architecture that are offered by Canadian universities.

The CACB receives its mandate from the Regulatory Organizations of Architecture in Canada (ROAC) representing all provincial and territorial regulators of the profession of architecture in Canada and the Canadian Council of University Schools of Architecture (CCUSA), representing all accredited university architecture programs in Canada.

The CACB, specifically the accreditation of the Schools, is funded by the ROAC member jurisdictions and the CCUSA. Both parties are responsible for approving the annual budget, based on a recommendation of the CACB Board of Directors. In accordance with usual procedure, the budget has been advanced to each of the ROAC regulators for approval. This approval confirms acceptance by each jurisdiction of their individual per capita funding allocation. The attached budget represents a total contribution of \$197,658 from the individual ROAC member jurisdictions. The OAA's contribution will be approximately \$65,000 for 2025. This is slightly less than the amount that was included in the approved 2025 budget for this line item.

Both OAA President, Settimo Vilardi and Senior Vice President & Treasurer, Ted Wilson have been privy to the ongoing information regarding the development of the budget and discussions between the three organizations. The draft was discussed at length at the October ROAC meeting in Toronto. As a result of those discussions, and the work of ROAC's National CACB Standing Committee, which serves to interface with CACB

on behalf of ROAC, a few adjustments were made. The attached is a modification of the budget presented at the ROAC meeting in October with the reduction to specific line items recommended by the Standing Committee.

For additional information, it is noted that a national Working Group has been established to develop a new Funding Agreement between the CCUSA and the ROAC as the existing agreement expired at the end of 2024. As a result, the Standing Committee may recommend that some items be amended retroactively once a draft agreement is in place. If this is the case, the particulars will be sent to each of the ROAC member jurisdictions for approval before any action is taken. This funding agreement pertains to the accreditation of the schools of architecture. Note that the Certification and BEFA budgets are based on a user pay model.

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### **Action**

Council is asked to consider the following motion:

*It was moved by... and second by ... that Council approve the 2025 CACB budget version 3 as presented to Council on January 23, 2025.*

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### **Attachments**

2025 CACB Draft Budget

Explanatory Notes to the 2025 CACB Draft Budget

2025 DRAFT PROVISIONAL BUDGET  
Ver. 3  
November 15, 2024

BUDGET ITEMS	1 2024 Budget	2 Quarter #2 as of June 30, 2024	3 Projected Year End 2024	4 Budget/ YE Forecast Variance Amounts	5 Draft proposed 2025 Budget	6 Academic Certification Draft proposed 2025 Budget	7 BEFA Draft proposed 2025 Budget	8 Accreditation Draft proposed 2025 Budget	9 Notes #
<b>DUES: APPLICANTS</b>									N1
Accredited/Non Domestic (NAAB)	\$8,532	\$5,056	\$8,940	\$408	\$9,130	\$9,130			
Non-accredited Domestic (Graduates prior to Accreditation)	\$0	\$0	\$0	\$0	\$0	\$0			
Non-accredited Non-domestic	\$481,650	\$330,402	\$512,826	\$31,176	\$494,000	\$494,000			
Non-accredited/Non-Domestic (Canberra Accord)	\$19,300	\$9,489	\$16,295	-\$3,005	\$16,405	\$16,405			
ECA Applicants	\$41,200	\$10,725	\$32,500	-\$8,700	\$81,250	\$81,250			
RAIC Syllabus	\$965	\$1,930	\$1,930	\$965	\$965	\$965			
Eligibility	\$75,921	\$38,759	\$75,921	\$0	\$77,868		\$77,868		
Demonstration of Competency	\$140,209	\$56,083	\$120,000	-\$20,209	\$140,209		\$140,209		
Interview	\$40,788	\$34,670	\$52,868	\$12,080	\$61,182		\$61,182		
<b>Total Dues</b>	<b>\$808,565</b>	<b>\$487,115</b>	<b>\$821,280</b>	<b>\$12,715</b>	<b>\$881,009</b>	<b>\$601,750</b>	<b>\$279,259</b>		N2
<b>GRANTS</b>									N3
ROAC Cash Contribution	\$204,764	\$102,382	\$204,764	\$0	\$194,640			\$194,640	
ROAC Contribution to Reserve Funds	\$4,472	\$2,236	\$4,472	\$0	\$3,018			\$3,018	N4
Total ROAC Contribution	\$209,236	\$104,618	\$209,236	\$0	\$197,659			\$197,659	
CCUSA Cash Contribution	\$127,773	\$127,773	\$127,773	\$0	\$115,639			\$115,639	
CCUSA Contribution to Reserve Funds	\$4,472	\$4,472	\$4,472	\$0	\$3,018			\$3,018	N4
Total CCUSA Cash Contribution	\$132,245	\$132,245	\$132,245	\$0	\$118,657			\$118,657	
Estimated Accreditation Visits Cost	\$76,992	\$76,992	\$76,992	\$0	\$79,001			\$79,001	
Total CCUSA Contribution	\$209,237	\$209,237	\$209,237	\$0	\$197,659			\$197,659	
<b>Total Grants</b>	<b>\$418,473</b>	<b>\$313,855</b>	<b>\$418,473</b>	<b>\$0</b>	<b>\$395,317</b>			<b>\$395,317</b>	N5
<b>OTHER INCOMES</b>									
Other Academic Certification Services	\$250	\$128	\$200	-\$50	\$200	\$200			
Other BEFA Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Accreditation Services (Candidacy Application)	\$0	\$0	\$0	\$0	\$0			\$0	
Accreditation Services (Candidacy Status)	\$0	\$0	\$0	\$0	\$0			\$0	
Interests	\$4,000	\$5,353	\$10,788	\$6,788	\$10,300	\$6,300	\$0	\$4,000	
Other (Investment Income)	\$25,000	\$17,083	\$30,316	\$5,316	\$35,000	\$35,000	\$0	\$0	
Miscellaneous	\$0	\$2,251	\$2,251	\$2,251	\$0	\$0	\$0	\$0	
<b>Total Other Income</b>	<b>\$29,250</b>	<b>\$24,815</b>	<b>\$43,555</b>	<b>\$14,305</b>	<b>\$45,500</b>	<b>\$41,500</b>	<b>\$0</b>	<b>\$4,000</b>	N6
<b>TOTAL REVENUE</b>	<b>\$1,256,288</b>	<b>\$825,784</b>	<b>\$1,283,308</b>	<b>\$27,020</b>	<b>\$1,321,826</b>	<b>\$643,250</b>	<b>\$279,259</b>	<b>\$399,317</b>	N7
<b>EXPENSES</b>				\$0					
<b>OPERATIONAL EXPENSES</b>				\$0					
<b>INTERNET TECHNOLOGY</b>	<b>\$37,697</b>	<b>\$19,565</b>	<b>\$41,526</b>	<b>\$3,829</b>	<b>\$39,764</b>	<b>\$32,503</b>	<b>\$5,115</b>	<b>\$2,147</b>	N8
Maintenance	\$36,982	\$19,544	\$40,811	\$3,829	\$37,947	\$32,255	\$3,795	\$1,897	
Equipment	\$21	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Development and Enhancement	\$0	\$0	\$0	\$0	\$1,320	\$0	\$1,320	\$0	
Internet Security (2 Factors Authentication)	\$715	\$0	\$715	\$0	\$497	\$248	\$0	\$249	
<b>OFFICE</b>	<b>\$187,895</b>	<b>\$97,480</b>	<b>\$190,646</b>	<b>\$2,751</b>	<b>\$199,285</b>	<b>\$119,966</b>	<b>\$48,508</b>	<b>\$30,811</b>	N9
Annual Visa Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Audit	\$12,763	\$500	\$10,500	-\$2,263	\$13,096	\$6,286	\$2,619	\$4,191	
Bank Charges	\$1,863	\$1,578	\$2,729	\$866	\$2,886	\$2,500	\$250	\$136	
Bookkeeping	\$40,310	\$17,603	\$34,492	-\$5,818	\$41,363	\$16,545	\$14,477	\$10,341	
Insurance (Commercial General Liability)	\$3,238	\$1,539	\$3,108	-\$130	\$3,218	\$2,266	\$466	\$486	
Insurance (Errors and Omissions Liability)	\$14,009	\$7,424	\$14,953	\$944	\$14,960	\$5,086	\$4,787	\$5,086	
Insurance (Cyber Insurance)	\$3,539	\$1,706	\$3,445	-\$94	\$3,539	\$2,654	\$708	\$177	
Internet Services, and Website Hosting and development	\$4,158	\$1,742	\$4,225	\$67	\$6,599	\$1,500	\$3,720	\$1,380	
Legal Fees	\$1,636	\$2,461	\$1,568	-\$668	\$0	\$0	\$0	\$0	
Membership Fees	\$3,872	\$1,824	\$4,626	\$754	\$4,653	\$1,850	\$952	\$1,850	
Office Supplies	\$7,190	\$7,222	\$9,960	\$2,770	\$10,220	\$8,176	\$1,533	\$511	
On-line Payment Fees (Beanstream)	\$18,840	\$12,508	\$18,871	\$31	\$18,871	\$11,323	\$7,548	\$0	
Parking-Taxi	\$0	\$17	\$0	\$0	\$0	\$0	\$0	\$0	
Photocopier	\$3,638	\$1,889	\$3,974	\$336	\$3,940	\$3,060	\$698	\$182	
Postage/Courier	\$5,460	\$2,370	\$6,833	\$1,373	\$6,833	\$5,936	\$547	\$349	
Publications, Design and Printing (includes Communication and Marketing)	\$2,254	\$2,038	\$2,038	\$0	\$0	\$0	\$0	\$0	
Rent	\$57,685	\$30,021	\$60,120	\$2,435	\$59,566	\$44,393	\$9,253	\$5,919	
Storage	\$7,489	\$3,563	\$6,563	-\$926	\$6,842	\$6,500	\$274	\$68	
Telephone	\$2,197	\$1,258	\$2,643	\$446	\$2,700	\$1,890	\$675	\$135	
Translation	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>HUMAN RESOURCES</b>	<b>\$640,800</b>	<b>\$380,323</b>	<b>\$674,235</b>	<b>\$33,435</b>	<b>\$741,833</b>	<b>\$422,741</b>	<b>\$169,565</b>	<b>\$149,526</b>	N10
<b>MEETINGS</b>	<b>\$170,544</b>	<b>\$65,782</b>	<b>\$170,544</b>	<b>\$0</b>	<b>\$150,342</b>	<b>\$18,802</b>	<b>\$74,322</b>	<b>\$57,218</b>	N11
AGM	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
BEFA Interviews	\$72,366	\$44,607	\$72,366	\$0	\$72,366	\$0	\$72,366	\$0	
Board	\$71,802	\$13,404	\$71,802	\$0	\$73,676	\$17,602	\$1,456	\$54,618	
ROAC	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
CCUSA	\$0	\$4,297	\$0	\$0	\$0	\$0	\$0	\$0	
Workshops with the Members	\$20,000	\$0	\$20,000	\$0	\$0	\$0	\$0	\$0	N12
NAAB	\$4,376	\$3,474	\$4,376	\$0	\$2,300	\$0	\$0	\$2,300	
Other Meetings	\$2,000	\$0	\$2,000	\$0	\$2,000	\$1,200	\$500	\$300	
<b>ASSESSMENT COMMITTEE (Acad.Certification)</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>CACB COMMITTEES AND TASK FORCES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>ACCREDITATION SERVICES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>ACCREDITATION VISITS ESTIMATED COST</b>	<b>\$76,992</b>	<b>\$76,992</b>	<b>\$76,992</b>	<b>\$0</b>	<b>\$79,001</b>			<b>\$79,001</b>	N13
<b>ACCREDITATION VISITING TEAMS</b>	<b>\$25,665</b>	<b>\$42,042</b>	<b>\$42,042</b>	<b>\$16,377</b>	<b>\$26,335</b>			<b>\$26,335</b>	N14
<b>TRAINING</b>	<b>\$8,000</b>	<b>\$5,774</b>	<b>\$5,774</b>	<b>-\$2,226</b>	<b>\$6,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$6,000</b>	N15
<b>ASSESSORS HONORARIUM</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$44,800</b>	<b>\$13,200</b>	<b>\$20,000</b>	<b>\$11,600</b>	N16
<b>AMORTIZATION</b>	<b>\$29,977</b>	<b>\$5,750</b>	<b>\$23,174</b>	<b>-\$6,803</b>	<b>\$10,500</b>	<b>\$8,400</b>	<b>\$1,575</b>	<b>\$525</b>	N17
<b>Sub-Total Operational Expenses</b>	<b>\$1,177,570</b>	<b>\$693,708</b>	<b>\$1,224,933</b>	<b>\$47,363</b>	<b>\$1,297,860</b>	<b>\$615,612</b>	<b>\$319,085</b>	<b>\$363,163.79</b>	N18
<b>CANBERRA ACCORD</b>									
Canberra Accord Secretariat Annual Fees	\$4,500	\$0	\$4,500	\$0	\$5,163	\$246		\$4,917	
Canberra Accord AGM	\$0	\$0	\$0	\$0	\$22,260	\$1,060		\$21,000	
Canberra Accord AGM Hosting	\$0	\$0	\$0	\$0	\$0	\$0		\$0	
Canberra Accord Periodic Reviews	\$7,000	\$13,327	\$13,327	\$6,327	\$0	\$0		\$0	
<b>Sub-Total Canberra Accord</b>	<b>\$11,500</b>	<b>\$13,327</b>	<b>\$17,827</b>	<b>\$6,327</b>	<b>\$27,423</b>	<b>\$1,306</b>		<b>\$26,117</b>	N19
<b>SPECIFIC PROJECTS</b>									
Strategic Plan Implementation (2016-2021)									
Finance Adviser-Risk Register									
Communication Adviser									
Strategic Plan Implementation (2022-2025)	\$20,000	\$0	\$6,800	-\$13,200	\$0	\$0	\$0	\$0	N20
Implementation	\$20,000	\$0	\$6,800	-\$13,200	\$0	\$0	\$0	\$0	
Research-Initiatives									N21
Climate Commitment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Related actions and expenses	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>Sub-Total Specific Projects</b>	<b>\$20,000</b>	<b>\$0</b>	<b>\$6,800</b>	<b>-\$13,200</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>CONFERENCE</b>									
Conference Preparation (including Conference Committee)		\$0	\$0	\$0	\$0			\$0	
Conditions and Procedures for Accreditation Writing Committee	\$28,000	\$25,373	\$28,000	\$0	\$0	\$0	\$0	\$0	
<b>Total Validation Conference</b>	<b>\$28,000</b>	<b>\$25,373</b>	<b>\$28,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	
<b>TOTAL EXPENSES</b>	<b>\$1,237,069</b>	<b>\$732,408</b>	<b>\$1,277,560</b>	<b>\$40,491</b>	<b>\$1,325,283</b>	<b>\$616,918</b>	<b>\$319,085</b>	<b>\$389,281</b>	N22
<b>NET INCOME</b>	<b>\$19,219</b>	<b>\$93,376</b>	<b>\$5,748</b>	<b>-\$13,471</b>	<b>-\$3,458</b>	<b>\$26,332</b>	<b>-\$39,826</b>	<b>\$10,036</b>	N23
<b>INTERFUND TRANSFER (from Reserve Fund Surplus)</b>					<b>\$39,826</b>	<b>\$0</b>	<b>\$39,826</b>	<b>\$0</b>	N24
<b>BALANCE END OF YEAR</b>					<b>\$36,369</b>	<b>\$26,332</b>	<b>\$0</b>	<b>\$10,036</b>	N25

1 2024 Budget	2 Quarter #2 as of June 30, 2024	3 Projected Year End 2024	4 Budget/ Actual Variance Amounts	5 Draft proposed 2025 Budget	6 Academic Certification Draft proposed 2025 Budget	7 BEFA Draft proposed 2025 Budget	8 Accreditation Draft proposed 2025 Budget	9 Notes #
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	BUDGET ITEMS	Academic Certification 2024 Budget	Academic Certification Quarter #2 as of June 30, 2024	Academic Certification Projected Year-End 2024	Budget/ YE Forecast Variance Amounts	Academic Certification Draft proposed 2025 Budget
1	<b>Dues: APPLICANTS</b>					
2	Accredited/Non Domestic (NAAB)	\$8,532	\$5,056	\$8,940	\$408	\$9,130
3	Non-accredited Domestic (Graduates prior to Accreditation)	\$0	\$0	\$0	\$0	\$0
4	Non-accredited Non-domestic	\$481,650	\$330,402	\$512,826	\$31,176	\$494,000
5	Non accredited/Non-Domestic (Canberra Accord)	\$19,300	\$9,489	\$16,295	-\$3,005	\$16,405
6	ECA Applicants	\$41,200	\$10,725	\$32,500	-\$8,700	\$81,250
7	RAIC Syllabus	\$965	\$1,930	\$1,930	\$965	\$965
11	<b>Total Dues</b>	<b>\$551,647</b>	<b>\$357,602</b>	<b>\$572,491</b>	<b>\$20,844</b>	<b>\$601,750</b>
22	<b>OTHER INCOMES</b>					
23	Other Academic Certification Services	\$250	\$128	\$200	-\$50	\$200
27	Interests	\$3,000	\$3,897	\$6,288	\$3,288	\$6,300
28	Other (Investment Income)	\$25,000	\$17,083	\$30,316	\$5,316	\$35,000
29	Miscellaneous	\$0	\$2,026	\$2,026	\$2,026	\$0
30	<b>Total Other Income</b>	<b>\$28,250</b>	<b>\$23,134</b>	<b>\$38,830</b>	<b>\$10,580</b>	<b>\$41,500</b>
31	<b>TOTAL REVENUE</b>	<b>\$579,897</b>	<b>\$380,736</b>	<b>\$611,321</b>	<b>\$199,161</b>	<b>\$643,250</b>
32	<b>EXPENSES</b>				\$0	
33	<b>OPERATIONAL EXPENSES</b>				\$0	
34	<b>INTERNET TECHNOLOGY</b>	\$27,979	\$14,658	\$31,205	\$3,226	\$32,503
35	Maintenance	\$27,736	\$14,658	\$30,962	\$3,226	\$32,255
36	Equipment	\$0	\$0	\$0	\$0	\$0
37	Development and Enhancement	\$0	\$0	\$0	\$0	\$0
38	Internet Security (2 Factors Authentication)	\$243	\$0	\$243	\$0	\$248
39	<b>OFFICE</b>	\$99,009	\$55,710	\$104,604	\$5,595	\$119,966
40	Annual Visa Fee	\$0	\$0	\$0	\$0	\$0
41	Audit	\$4,339	\$170	\$3,570	-\$769	\$6,286
42	Bank Charges	\$1,677	\$1,286	\$2,456	\$779	\$2,500
43	Bookkeeping	\$13,600	\$5,985	\$11,727	-\$1,873	\$16,545
44	Insurance (Commercial General Liability)	\$1,943	\$923	\$1,865	-\$78	\$2,266
45	Insurance (Errors and Omissions Liability)	\$4,763	\$2,524	\$5,117	\$354	\$5,086
46	Insurance (Cyber Insurance)	\$2,123	\$1,024	\$2,048	-\$75	\$2,654
47	Internet Services, and Website Hosting and development	\$1,414	\$592	\$1,466	\$52	\$1,500
48	Legal Fees	\$0	\$0	\$0	\$0	\$0
49	Membership Fees	\$1,492	\$712	\$1,869	\$377	\$1,850
50	Office Supplies	\$5,752	\$5,849	\$7,968	\$2,216	\$8,176
51	On-line Payment Fees (Beanstream)	\$11,304	\$8,941	\$11,323	\$19	\$11,323
52	Parking-Taxi	\$0	\$0	\$0	\$0	\$0
53	Photocopier	\$3,092	\$1,606	\$3,093	\$1	\$3,060
54	Postage/Courier	\$4,648	\$2,015	\$5,936	\$1,288	\$5,936
55	Publications, Design and Printing (includes Communication and Marketing)	\$0	\$1,804	\$1,778	\$1,778	\$0
56	Rent	\$34,208	\$18,013	\$36,072	\$1,864	\$44,393
57	Storage	\$7,116	\$3,385	\$6,466	-\$650	\$6,500
58	Telephone	\$1,538	\$881	\$1,850	\$312	\$1,890
59	Translation	\$0	\$0	\$0	\$0	\$0
60	<b>HUMAN RESOURCES</b>	\$384,480	\$226,892	\$411,988	\$157,588	\$422,741
61	<b>MEETINGS</b>	\$24,954	\$4,297	\$24,954	\$20,657	\$18,802
62	AGM	\$0	\$0	\$0	\$0	\$0
64	Board	\$17,154	\$0	\$17,154	\$0	\$17,602
65	ROAC	\$0	\$0	\$0	\$0	\$0
66	CCUSA	\$0	\$4,297	\$0	\$0	\$0
67	Workshops with the Members	\$6,800	\$0	\$6,800	\$0	\$0
68	NAAB	\$0	\$0	\$0	\$0	\$0
69	Other Meetings	\$1,000	\$0	\$1,000	\$0	\$1,200
70	<b>ASSESSMENT COMMITTEE (Acad.Certification)</b>	\$0	\$0	\$0	\$0	\$0
71	<b>CACB COMMITTEES AND TASK FORCES</b>	\$0	\$0	\$0	\$0	\$0
75	<b>TRAINING</b>	\$0	\$0	\$0	\$0	\$0
76	<b>ASSESSORS HONORARIUM</b>	\$0	\$0	\$0	\$0	\$13,200
77	<b>AMORTIZATION</b>	\$26,979	\$4,516	\$20,176	-\$6,803	\$8,400
78	<b>Sub-Total Operational Expenses</b>	<b>\$563,401</b>	<b>\$306,073</b>	<b>\$592,927</b>	<b>\$29,526</b>	<b>\$615,612</b>
79	<b>CANBERRA ACCORD</b>				\$0	
80	Canberra Accord Secretariat Annual Fees	\$225	\$0	\$225	\$0	\$246
81	Canberra Accord AGM	\$0	\$0	\$0	\$0	\$1,060
82	Canberra Accord AGM Hosting	\$0	\$0	\$0	\$0	\$0
83	Canberra Accord Periodic Reviews	\$350	\$648	\$648	\$298	\$0
84	<b>Sub-Total Canberra Accord</b>	<b>\$575</b>	<b>\$648</b>	<b>\$873</b>	<b>\$298</b>	<b>\$1,306</b>
85	<b>SPECIFIC PROJECTS</b>				\$0	
86	<b>Strategic Plan Implementation (2016-2021)</b>				\$0	
87	Finance Adviser-Risk Register				\$0	
88	Communication Adviser				\$0	
89	<b>Strategic Plan Preparation (2022-2025)</b>	\$6,800	\$0	\$6,800	\$0	\$0
90	Implementation	\$6,800	\$0	\$6,800	\$0	\$0
91	<b>Research Initiatives</b>				\$0	
92	<b>Climate Commitment</b>	\$0	\$0	\$0	\$0	\$0
93	Related actions and expenses	\$0	\$0	\$0	\$0	\$0
94	<b>Sub-Total Specific Projects</b>	<b>\$6,800</b>	<b>\$0</b>	<b>\$6,800</b>	<b>\$0</b>	<b>\$0</b>
95	<b>CONFERENCE</b>				\$0	
96	Conference Preparation (including Conference Committee)				\$0	
97	Conditions and Procedures for Accreditation Writing Committee	\$1,400	\$1,302	\$1,400	\$0	\$0
98	<b>Total Validation Conference</b>	<b>\$1,400</b>	<b>\$1,302</b>	<b>\$1,400</b>	<b>\$0</b>	<b>\$0</b>
99	<b>TOTAL EXPENSES</b>	<b>\$572,176</b>	<b>\$308,024</b>	<b>\$602,000</b>	<b>\$29,824</b>	<b>\$616,918</b>
100	<b>NET INCOME</b>	<b>\$7,721</b>	<b>\$72,712</b>	<b>\$9,321</b>	<b>\$1,600</b>	<b>\$26,332</b>
101	<b>INTERFUND TRANSFER (SUPPLUS RESERVE FUNDS)</b>					\$0
102	<b>BALANCE END OF YEAR</b>					\$26,332
103						

Academic Certification 2024 Budget	Academic Certification Quarter #2 as of June 30, 2024	Academic Certification Projected Year-End 2024	Budget/ YE Forecast Variance Amounts	Academic Certification Draft proposed 2025 Budget
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	BUDGET ITEMS	BEFA 2024 Budget	BEFA Quarter #2 as of June 30, 2024	BEFA Projected Year- End 2024	Budget/ YE Forecast Variance Amounts	BEFA Draft proposed 2025 Budget
1	<b>Dues: APPLICANTS</b>					
8	Eligibility	\$75,921	\$38,759	\$75,921	\$0	\$77,868
9	Demonstration of Competency	\$140,209	\$56,083	\$120,000	-\$20,209	\$140,209
10	Interview	\$40,788	\$34,670	\$52,868	\$12,080	\$61,182
11	<b>Total Dues</b>	<b>\$256,918</b>	<b>\$129,512</b>	<b>\$248,789</b>	<b>-\$8,129</b>	<b>\$279,259</b>
22	<b>OTHER INCOMES</b>				\$0	
24	Other BEFA Services	\$0			\$0	
27	Interests	\$0			\$0	
28	Other (Investment Income)				\$0	
29	Miscellaneous		\$0		\$0	
30	<b>Total Other Income</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
31	<b>TOTAL REVENUE</b>	<b>\$256,918</b>	<b>\$129,512</b>	<b>\$248,789</b>	<b>-\$8,129</b>	<b>\$279,259</b>
32	<b>EXPENSES</b>					
33	<b>OPERATIONAL EXPENSES</b>					
34	<b>INTERNET TECHNOLOGY</b>	<b>\$5,776</b>	<b>\$2,952</b>	<b>\$6,192</b>	<b>\$416</b>	<b>\$5,115</b>
35	Maintenance	\$5,547	\$2,932	\$5,963	\$416	\$3,795
36	Equipment		\$21		\$0	
37	Development and Enhancement				\$0	\$1,320
38	Internet Security (2 Factors Authentication)	\$229		\$229	\$0	
39	<b>OFFICE</b>	<b>\$45,519</b>	<b>\$22,569</b>	<b>\$44,484</b>	<b>-\$1,035</b>	<b>\$48,508</b>
40	Annual Visa Fee		\$0		\$0	
41	Audit	\$4,084	\$160	\$3,360	-\$724	\$2,619
42	Bank Charges	\$93	\$144	\$136	\$43	\$250
43	Bookkeeping	\$13,110	\$5,633	\$11,037	-\$2,073	\$14,477
44	Insurance (Commercial General Liability)	\$486	\$231	\$466	-\$20	\$466
45	Insurance (Errors and Omissions Liability)	\$4,483	\$2,376	\$4,816	\$333	\$4,787
46	Insurance (Cyber Insurance)	\$531	\$256	\$512	-\$19	\$708
47	Internet Services, and Website Hosting and development	\$1,330	\$557	\$1,380	\$50	\$3,720
48	Legal Fees	\$1,636	\$2,461	\$1,568	-\$68	
49	Membership Fees	\$888	\$400	\$888	\$0	\$952
50	Office Supplies	\$1,078	\$1,029	\$1,494	\$416	\$1,533
51	On-line Payment Fees (Beanstream)	\$7,536	\$3,568	\$7,548	\$12	\$7,548
52	Parking-Taxi		\$0		\$0	
53	Photocopier	\$364	\$189	\$698	\$334	\$698
54	Postage/Courier	\$547	\$237	\$547	\$0	\$547
55	Publications, Design and Printing (includes Communication and Marketing)	\$0	\$338	\$260	\$260	
56	Rent	\$8,804	\$4,503	\$9,018	\$214	\$9,253
57	Storage	\$0	\$173	\$94	\$94	\$274
58	Telephone	\$549	\$315	\$661	\$112	\$675
59	Translation	\$0	\$0		\$0	
60	<b>HUMAN RESOURCES</b>	<b>\$115,344</b>	<b>\$61,709</b>	<b>\$116,524</b>	<b>\$1,180</b>	<b>\$169,565</b>
61	<b>MEETINGS</b>	<b>\$80,825</b>	<b>\$44,986</b>	<b>\$80,825</b>	<b>\$0</b>	<b>\$74,322</b>
62	AGM	\$0			\$0	
63	BEFA Interviews	\$72,366	\$44,607	\$72,366	\$0	\$72,366
64	Board	\$1,419	\$379	\$1,419	\$0	\$1,456
65	ROAC	\$0			\$0	
66	CCUSA	\$0			\$0	
67	Workshops with the Members	\$6,400		\$6,400	\$0	
68	NAAB	\$0			\$0	
69	Other Meetings	\$640		\$640	\$0	\$500
71	<b>CACB COMMITTEES AND TASK FORCES</b>	<b>\$0</b>			<b>\$0</b>	<b>\$0</b>
75	<b>TRAINING</b>		\$0		\$0	\$0
76	<b>ASSESSORS HONORARIUM</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$20,000</b>
77	<b>AMORTIZATION</b>	<b>\$1,499</b>	<b>\$862.50</b>	<b>\$1,499</b>	<b>\$0</b>	<b>\$1,575</b>
78	<b>Sub-Total Operational Expenses</b>	<b>\$248,963</b>	<b>\$133,078</b>	<b>\$249,525</b>	<b>\$562</b>	<b>\$319,085</b>
79	<b>CANBERRA ACCORD</b>				\$0	
80	Canberra Accord Secretariat Annual Fees	\$4,500	\$4,500	\$4,500	\$0	
81	Canberra Accord AGM	\$18,000	\$18,000	\$18,000	\$0	
82	Canberra Accord AGM Hosting	\$0	\$0	\$0	\$0	
83	Canberra Accord Periodic Reviews	\$0	\$0	\$0	\$0	
84	<b>Sub-Total Canberra Accord</b>	<b>\$22,500</b>	<b>\$22,500</b>	<b>\$22,500</b>	<b>\$0</b>	
85	<b>SPECIFIC PROJECTS</b>				\$0	
86	<b>Strategic Plan Implementation (2016-2021)</b>				\$0	
87	Finance Adviser-Risk Register				\$0	
88	Communication Adviser				\$0	
89	<b>Strategic Plan Preparation (2022-2025)</b>	<b>\$6,400</b>	<b>\$0</b>	<b>\$0</b>	<b>-\$6,400</b>	<b>\$0</b>
90	Implementation/Communication Adviser	\$6,400			-\$6,400	
94	<b>Sub-Total Specific Projects</b>	<b>\$6,400</b>	<b>\$0</b>	<b>\$0</b>	<b>-\$6,400</b>	<b>\$0</b>
99	<b>TOTAL EXPENSES</b>	<b>\$255,363</b>	<b>\$133,078</b>	<b>\$249,525</b>	<b>-\$5,838</b>	<b>\$319,085</b>
100	<b>NET INCOME</b>	<b>\$1,555</b>	<b>-\$3,566</b>	<b>-\$736</b>	<b>-\$2,291</b>	<b>-\$39,826</b>
101	<b>INTERFUND TRANSFER (SUPLUS RESERVE FUNDS)</b>					<b>\$39,826</b>
102	<b>BALANCE END OF YEAR</b>					<b>\$0</b>
103						
		<b>BEFA 2024 Budget</b>	<b>BEFA Quarter #2 as of June 30, 2024</b>	<b>BEFA Projected Year- End 2024</b>	<b>Budget/ YE Forecast Variance Amounts</b>	<b>BEFA Draft proposed 2025 Budget</b>

## ACCREDITATION PROGRAM

Ver. 3  
Oct.15, 2024

	BUDGET ITEMS	Accreditation 2024 Budget	Accreditation Quarter #2 as of June 30, 2024	Accreditation Projected Year-End 2024	Budget/ YE Forecast Variance Amounts	Accreditation Draft proposed 2025 Budget
12	<b>GRANTS</b>					
13	ROAC Cash Contribution	\$204,764	\$102,382	\$204,764	\$0	\$194,640
14	ROAC Contribution to Reserve Funds	\$4,472	\$2,236	\$4,472	\$0	\$3,018
15	Total ROAC Contribution	\$209,236	\$104,618	\$209,236	\$0	\$197,659
16	CCUSA Cash Contribution	\$127,773	\$127,773	\$127,773	\$0	\$115,639
17	CCUSA Contribution to Reserve Funds	\$4,472	\$4,472	\$4,472	\$0	\$3,018
18	Total CCUSA Cash Contribution	\$132,245	\$132,245	\$132,245	\$0	\$118,657
19	Estimated Accreditation Visits Cost	\$76,992	\$76,992	\$76,992	\$0	\$79,001
20	Total CCUSA Contribution	\$209,237	\$209,237	\$209,237	\$0	\$197,659
21	<b>Total Grants</b>	<b>\$418,473</b>	<b>\$313,855</b>	<b>\$418,473</b>	<b>\$0</b>	<b>\$395,317</b>
22	<b>OTHER INCOMES</b>					
25	Accreditation Services (Candidacy Application)	\$0			\$0	
26	Accreditation Services (Candidacy Status)	\$0			\$0	
27	Interests	\$1,000	\$1,456	\$4,500	\$3,500	\$4,000
28	Other (Investment Income)		\$0	\$0	\$0	\$0
29	Miscellaneous		\$225	\$225	\$225	
30	<b>Total Other Income</b>	<b>\$1,000</b>	<b>\$1,681</b>	<b>\$4,725</b>	<b>\$3,725</b>	<b>\$4,000</b>
31	<b>TOTAL REVENUE</b>	<b>\$419,473</b>	<b>\$315,536</b>	<b>\$423,198</b>	<b>\$3,725</b>	<b>\$399,317</b>
32	<b>EXPENSES</b>					
33	<b>OPERATIONAL EXPENSES</b>					
34	<b>INTERNET TECHNOLOGY</b>	<b>\$3,941</b>	<b>\$1,954</b>	<b>\$4,128</b>	<b>\$187</b>	<b>\$2,147</b>
35	Maintenance	\$3,698	\$1,954	\$3,885	\$187	\$1,897
36	Equipment				\$0	
37	Development and Enhancement				\$0	
38	Internet Security (2 Factors Authentication)	\$243		\$243	\$0	\$249
39	<b>OFFICE</b>	<b>\$43,366</b>	<b>\$19,203</b>	<b>\$37,392</b>	<b>-\$5,974</b>	<b>\$30,811</b>
40	Annual Visa Fee		\$0		\$0	
41	Audit	\$4,339	\$170	\$3,570	-\$769	\$4,191
42	Bank Charges	\$93	\$148	\$136	\$43	\$136
43	Bookkeeping	\$13,600	\$5,985	\$11,727	-\$1,873	\$10,341
44	Insurance (Commercial General Liability)	\$809	\$385	\$777	-\$32	\$486
45	Insurance (Errors and Omissions Liability)	\$4,763	\$2,524	\$853	-\$3,910	\$5,086
46	Insurance (Cyber Insurance)	\$885.00	\$427	\$885	\$0	\$177
47	Internet Services, and Website Hosting and development	\$1,414	\$592	\$1,380	-\$34	\$1,380
48	Legal Fees	\$0	\$0		\$0	
49	Membership Fees	\$1,492.00	\$712	\$1,869	\$377	\$1,850
50	Office Supplies	\$359	\$344	\$498	\$139	\$511
51	On-line Payment Fees (Beanstream)		\$0		\$0	
52	Parking-Taxi		\$17		\$0	
53	Photocopier	\$182	\$94	\$182	\$0	\$182
54	Postage/Courier	\$273	\$119	\$349	\$76	\$349
55	Publications, Design and Printing (includes Communication and Marketing)		\$113		\$0	
56	Rent	\$14,674	\$7,505	\$15,030	\$356	\$5,919
57	Storage	\$373	\$5	\$3	-\$370	\$68
58	Telephone	\$110	\$63	\$132	\$22	\$135
59	Translation		\$0		\$0	
60	<b>HUMAN RESOURCES</b>	<b>\$140,976</b>	<b>\$91,722</b>	<b>\$145,723</b>	<b>\$4,747</b>	<b>\$149,526</b>
61	<b>MEETINGS</b>	<b>\$64,765</b>	<b>\$16,499</b>	<b>\$64,765</b>	<b>\$0</b>	<b>\$57,218</b>
62	AGM	\$0			\$0	
63	BEFA Interviews				\$0	
64	Board	\$53,229	\$13,025	\$53,229	\$0	\$54,618
65	ROAC	\$0			\$0	
66	CCUSA	\$0			\$0	
67	Workshops with the Members	\$6,800		\$6,800	\$0	
68	NAAB	\$4,376	\$3,474	\$4,376	\$0	\$2,300
69	Other Meetings	\$360	\$0	\$360	\$0	\$300
71	<b>CACB COMMITTEES AND TASK FORCES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
72	<b>ACCREDITATION SERVICES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
73	<b>ACCREDITATION VISITS ESTIMATED COST</b>	<b>\$76,992</b>	<b>\$76,992</b>	<b>\$76,992</b>	<b>\$0</b>	<b>\$79,001</b>
74	<b>ACCREDITATION VISITING TEAMS</b>	<b>\$25,665</b>	<b>\$42,042</b>	<b>\$42,042</b>	<b>\$16,377</b>	<b>\$26,335</b>
75	<b>TRAINING</b>	<b>\$8,000</b>	<b>\$5,774</b>	<b>\$5,774</b>	<b>-\$2,226</b>	<b>\$6,000</b>
76	<b>ASSESSORS HONORARIUM</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$11,600</b>
77	<b>AMORTIZATION</b>	<b>\$1,499</b>	<b>\$372.00</b>	<b>\$1,499</b>	<b>\$0</b>	<b>\$525</b>
78	<b>Sub-Total Operational Expenses</b>	<b>\$365,203</b>	<b>\$254,559</b>	<b>\$378,315</b>	<b>\$110,644</b>	<b>\$363,164</b>
79	<b>CANBERRA ACCORD</b>					
80	Canberra Accord Secretariat Annual Fees	\$4,275	\$0	\$4,275	\$0	\$4,917
81	Canberra Accord AGM	\$0			\$0	\$21,200
82	Canberra Accord AGM Hosting	\$0			\$0	\$0
83	Canberra Accord Periodic Reviews	\$6,650	\$12,679	\$12,679	\$6,029	
84	<b>Sub-Total Canberra Accord</b>	<b>\$10,925</b>	<b>\$12,679</b>	<b>\$16,954</b>	<b>\$6,029</b>	<b>\$26,117</b>
85	<b>SPECIFIC PROJECTS</b>					
86	Strategic Plan Implementation (2016-2021)					\$0
87	Finance Adviser-Risk Register					
88	Communication Adviser					
89	Strategic Plan Preparation (2022-2025)	\$6,800	\$0	\$0	\$6,800	\$0
90	Implementation	\$6,800			-\$6,800	
91	Research Initiatives				\$0	
92	Climate Commitment	\$0	\$0	\$0	\$0	\$0
93	Related actions and expenses	\$0	\$0	\$0	\$0	\$0
94	<b>Sub-Total Specific Projects</b>	<b>\$6,800</b>	<b>\$0</b>	<b>\$0</b>	<b>-\$6,800</b>	<b>\$0</b>
95	<b>CONFERENCE</b>					
96	Conference Preparation (including Conference Committee)				\$0	\$0
97	Conditions and Procedures for Accreditation Writing Committee	\$26,600	\$24,071	\$26,600	\$0	
98	<b>Total Validation Conference</b>	<b>\$26,600</b>	<b>\$24,071</b>	<b>\$26,600</b>	<b>\$0</b>	<b>\$0</b>
99	<b>TOTAL EXPENSES</b>	<b>\$409,528</b>	<b>\$291,307</b>	<b>\$421,869</b>	<b>\$12,341</b>	<b>\$389,281</b>
100	<b>NET INCOME</b>	<b>\$9,945</b>	<b>\$24,229</b>	<b>\$1,329</b>	<b>-\$8,616</b>	<b>\$10,036</b>
101	<b>INTERFUND TRANSFER (SUPLUS RESERVE FUNDS)</b>					<b>\$0</b>
102	<b>BALANCE END OF YEAR</b>					<b>\$10,036</b>
103						
		<b>Accreditation 2024 Budget</b>	<b>Accreditation Quarter #2 as of June 30, 2024</b>	<b>Accreditation Projected Year-End 2024</b>	<b>Budget/ YE Forecast Variance Amounts</b>	<b>Accreditation Draft proposed 2025 Budget</b>

## 2.4-Members' Grants Overview

Members's Contributions to the Accreditation Program	2015 Audited	2016 Audited	2017 Audited	2018 Audit	2019 Audit	2020 Audit	2021 Audit	2022 Audit	2023 Audit	2024 Budget	2025 Projected	2025 Updated Ver. V1 Oct.11, 2024	2025 Updated Ver. V2 Oct.11, 2024	2025 Updated Ver. V3 Oct.31, 2024-ROAC	Diff. V1 vs V2	Diff. V1 vs V3	Diff. V2 vs V3
Grants																	
<b>ROAC</b>																	
ROAC Cash Contribution	\$201,960	\$185,211	\$188,904	\$174,841	\$167,823	\$179,731	\$137,920	\$60,780	\$114,496	\$204,764	\$197,974	\$205,003	\$212,340	\$194,640	\$7,337	-\$10,363	-\$17,700
ROAC Contribution to Reserve Funds	\$0	\$0	\$2,196	\$2,033	\$1,951	\$2,201	\$0	\$0	\$0	\$4,472	\$3,105	\$3,289	\$3,097	\$3,018	-\$192	-\$271	-\$79
<b>Total ROAC Cash Contribution</b>	<b>\$201,960</b>	<b>\$185,211</b>	<b>\$191,100</b>	<b>\$176,874</b>	<b>\$169,774</b>	<b>\$181,932</b>	<b>\$137,920</b>	<b>\$60,780</b>	<b>\$114,496</b>	<b>\$209,236</b>	<b>\$201,079</b>	<b>\$208,292</b>	<b>\$215,437</b>	<b>\$197,658</b>	<b>\$7,145</b>	<b>-\$10,634</b>	<b>-\$17,779</b>
Registered Architects	11759	12082	12564	12926	13604	13763	14117	14367	14947	15432	15432	15432	15432	15432	15432	15432	15432
<b>Contribution per registered architect</b>	<b>\$17.17</b>	<b>\$15.33</b>	<b>\$15.21</b>	<b>\$13.68</b>	<b>\$12.48</b>	<b>\$13.22</b>	<b>\$9.77</b>	<b>\$4.23</b>	<b>\$7.66</b>	<b>\$13.56</b>	<b>\$13.03</b>	<b>\$13.50</b>	<b>\$13.96</b>	<b>\$12.81</b>	<b>\$0.46</b>	<b>-\$1</b>	<b>-\$1</b>
<b>CCUSA</b>																	
CCUSA Cash Contribution	\$100,980	\$100,980	\$103,897	\$96,163	\$92,302	\$113,731	\$71,207	\$72,456	\$107,517	\$127,773	\$118,972	\$126,001	\$118,665	\$115,639	-\$7,336	-\$10,362	-\$3,026
CCUSA Contribution to Reserve Funds	\$0	\$0	\$2,196	\$2,033	\$1,951	\$2,201	\$0	\$0	\$0	\$4,472	\$3,105	\$3,289	\$3,097	\$3,018	-\$192	-\$271	-\$79
<b>Total CCUSA Cash Contribution</b>	<b>\$100,980</b>	<b>\$100,980</b>	<b>\$106,093</b>	<b>\$98,196</b>	<b>\$94,253</b>	<b>\$115,932</b>	<b>\$71,207</b>	<b>\$72,456</b>	<b>\$107,517</b>	<b>\$132,245</b>	<b>\$122,077</b>	<b>\$129,290</b>	<b>\$121,762</b>	<b>\$118,657</b>	<b>-\$7,528</b>	<b>-\$10,633</b>	<b>-\$3,105</b>
Consideration for Accreditation Visits Cost		\$84,231	\$85,007	\$78,679	\$75,520	\$66,000	\$66,713	\$73,713	\$75,408	\$76,992	\$79,001	\$79,001	\$93,675	\$79,001	-\$7,720	\$0	-\$14,674
<b>Total CCUSA Contribution</b>	<b>\$100,980</b>	<b>\$185,211</b>	<b>\$191,100</b>	<b>\$176,874</b>	<b>\$169,774</b>	<b>\$181,932</b>	<b>\$137,920</b>	<b>\$146,169</b>	<b>\$182,925</b>	<b>\$209,237</b>	<b>\$201,079</b>	<b>\$208,291</b>	<b>\$215,437</b>	<b>\$197,658</b>	<b>-\$15,248</b>	<b>-\$10,633</b>	<b>-\$17,779</b>
Accredited Schools	11	11	11	11	11	11	11	12	12	12	12	12	12	12	12	12	12
<b>Cash Contribution per Accredited Program</b>	<b>\$9,180.00</b>	<b>\$9,180.00</b>	<b>\$9,644.82</b>	<b>\$8,926.91</b>	<b>\$8,568.45</b>	<b>\$10,539.27</b>	<b>\$6,473.36</b>	<b>\$6,038.00</b>	<b>\$8,959.75</b>	<b>\$11,020.42</b>	<b>\$10,173</b>	<b>\$10,774</b>	<b>\$10,147</b>	<b>\$9,888</b>	<b>-\$627</b>	<b>-\$886</b>	<b>-\$259</b>



	<b>BUDGET ITEMS</b>	<b>Accreditation Draft proposed 2025 Budget V3</b>
12	<b>GRANTS</b>	
13	ROAC Cash Contribution	\$194,640
14	ROAC Contribution to Reserve Funds	\$3,018
15	Total ROAC Contribution	\$197,659
16	CCUSA Cash Contribution	\$115,639
17	CCUSA Contribution to Reserve Funds	\$3,018
18	Total CCUSA Cash Contribution	\$118,657
19	Estimated Accreditation Visits Cost	\$79,001
20	Total CCUSA Contribution	\$197,659
21	<b>Total Grants</b>	<b>\$395,317</b>
22	<b>OTHER INCOMES</b>	
25	Accreditation Services (Candidacy Application)	
26	Accreditation Services (Candidacy Status)	
27	Interests	\$4,000
28	Other (Investment Income)	\$0
29	Miscellaneous	
30	<b>Total Other Income</b>	<b>\$4,000</b>
31	<b>TOTAL REVENUE</b>	<b>\$399,317</b>
32	<b>EXPENSES</b>	
33	<b>OPERATIONAL EXPENSES</b>	
34	INTERNET TECHNOLOGY	\$2,147
39	OFFICE	\$30,811
60	HUMAN RESOURCES	\$149,526
61	MEETINGS	\$57,218
64	Board	\$54,618
68	NAAB	\$2,300
69	Other Meetings	\$300
73	ACCREDITATION VISITS ESTIMATED COST	\$79,001
74	ACCREDITATION VISITING TEAMS	\$26,335
75	TRAINING	\$6,000
76	ASSESSORS HONORARIUM	\$11,600
77	AMORTIZATION	\$525
78	<b>Sub-Total Operational Expenses</b>	<b>\$363,164</b>
79	CANBERRA ACCORD	
84	<b>Sub-Total Canberra Accord</b>	<b>\$26,117</b>
85	SPECIFIC PROJECTS	
94	<b>Sub-Total Specific Projects</b>	<b>\$0</b>
95	CONFERENCE	
98	<b>Total Validation Conference</b>	<b>\$0</b>
99	<b>TOTAL EXPENSES</b>	<b>\$389,281</b>
100	<b>NET INCOME</b>	<b>\$10,036</b>
101	INTERFUND TRANSFER (SUPLUS RESERVE FUNDS)	\$0
102	<b>BALANCE END OF YEAR</b>	<b>\$10,036</b>
103		

**Accreditation  
Draft proposed  
2025 Budget**

**CACB**

CANADIAN ARCHITECTURAL  
CERTIFICATION BOARD

**CCCA**

CONSEIL CANADIEN DE  
CERTIFICATION EN ARCHITECTURE

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**CACB**

**CCCA**

CANADIAN ARCHITECTURAL  
CERTIFICATION BOARD

CONSEIL CANADIEN DE  
CERTIFICATION EN ARCHITECTURE

## **2. Notes on 2025 Proposed Budget**

By Mourad Mohand-Said

**Date: July 18, 2024**

We are pleased to propose the CACB-CCCA 2025 Budget for Members' Approval.

Similar to 2024, the 2025 Budget Approval Package includes a multi-tab Excel sheet accompanied by explanatory notes. You will also find attached:

- 2.1- Revised Expense Distribution
- 2.2- Impact Assessment-Implementation Mentorship Program
- 2.3- CACB-Proposed Honorarium Program
- 2.4- Members' Grants Overview
- 2.5- CACB-Financial Statement-2023

The 2025 proposed budget was prepared with the following assumptions:

- Extension of the current Accreditation Program Funding Agreement expiring on **December 31, 2024**.
- Adjustment of expense distribution rates by program to accurately reflect expenses per program.
- 2.61% increase based on the [Consumer Price Index](#) where applicable.
- Adjustment of BEFA Program expenses by adding human resources to implement the Mentorship Program.
- Addition of a new expense line for assessors' honorarium per program.

The CACB appreciates the ROAC Standing Committee's note and feedback regarding the deficit resulting from the preparation of the 2022 Conference. Moving forward, and in accordance with the procedures outlined in the Members Agreement, the CACB will take all necessary measures to avoid such situations from occurring again and discuss any related matters with the Members beforehand.

The multi-tab Excel sheet is organized as follows:

Tab. 1: 2024\_Draft\_All\_Programs with 9 columns:

- the 2024 approved budget: column #1;
- the 2024 Quarterly Report #2 (June 30): column #2;
- projected 2024 year-end results: column #3;
- 2024 budget/Year-End Forecast variance amounts: column #4;
- the draft 2025 proposed budget (3 Programs): column #5;
- breakdown of each of the 3 programs: Academic Certification, BEFA certification and Accreditation columns #6, 7, 8; and
- a column (#9) with Note Numbers (N) highlighting budget lines.

Tab. 2: 2025\_Dft\_Acad\_Certification • Academic Certification Program previous year's budget/actual figures and Year-end forecast for with a 2025 draft proposed budget column

Tab. 3: 2025\_Dft\_BEFA\_Certification • BEFA Certification Program previous year's budget/actual figures and Year-end forecast for with a 2025 draft proposed budget column

Tab. 4: 2025\_Dft\_Accreditation • Accreditation Program previous year's budget/actual figures and Year-end forecast for with a 2025 draft proposed budget column

Tab. 5: Audits-2019-2023 • Provides a history of audited operating statements for the five preceding years

Tab. 6: Balance Sheets • Provides a history of audited Balance Sheets for the five preceding years.

To enable the approval of the CACB Budget for our November 2024 Board meeting, we kindly request that Members confirm their approval to the CACB by **October 31, 2024**, and submit any questions or suggested revisions by **September 27, 2024**.

**EXPLANATORY NOTES****Adjustment of the expense distribution rates by program**

Some expenses were revised based on a five-year history and the fair share per program. Expenses related to IT maintenance were documented through invoices and pertain mainly to the maintenance of the CRM system, which is primarily used by the Academic and BEFA Programs. Bookkeeping and audit rates were adjusted based on feedback from the auditors and bookkeepers. The rental rate was revised to reflect the space allocation for the Accreditation and BEFA Programs, as the Academic Certification program occupies most of the premises. The same approach was applied to storage expenses, where the storage requirement for the Accreditation Program is significantly less compared to the Certification Programs.

The table below summarizes the proposed revised rates

Expense	Programs					
	Academic Certification		BEFA		Accreditation	
	Current	Revised	Current	Revised	Current	Revised
IT Maintenance	75%	85%	15%	10%	10%	5%
Audit	34%	48%	32%	20%	34%	32%
Bookkeeping	34%	40%	32%	35%	34%	25%
Insurance (Commercial General Liability)	60%	70%	15%	15%	25%	15%
Insurance (Cyber Insurance)	60%	75%	15%	20%	25%	5%
Membership Fees	50%	40%	0%	20%	50%	40%
Rent	60%	75%	15%	15%	25%	10%
Storage	95%	95%	0%	4%	5%	1%
Other Meetings	50%	60%	32%	25%	18%	15%

## REVENUES

### N1: Dues Applicants

- Increase by 5% for NAAB Graduates Fees.
- Other modes of certification will be processed with the same Fee schedule as in 2024.
- Dues of ECA Applicants will be part of Academic Certification Dues. The ECA Program is effective since May 20, 2024. We anticipate to receive 250 ECA Applications in 2025. Application Fee= \$325
- No change for BEFA Certification Fees Schedule anticipated. Same as is 2024.

### N2: Total Dues

A total due of **\$881009** is projected for the certification Programs.

- Academic Certification: **\$601,750**
- BEFA Certification: **\$279,259**

### N3: Grants

The Accreditation Program is funded equally (50%-50%) by CCUSA and ROAC, as per the current 5-year (2020-2025) Funding Agreement. The grants are made of cash contributions and established estimated costs of actual accreditation visits.

### N4: Reserve Fund for Accreditation Program

Each Member is expected to make a contribution equal to a factor generally representing the Consumer Price Index (CPI) for the previous year, applied to 50% of the operating expenses for the Accreditation Program, minus the estimated Accreditation Visits cost.

For 2025, the Members' contribution to the Reserve Funds is estimated using a CPI of 2.61%. Each Member is expected to contribute \$3,105 to the Accreditation Program's Reserve Fund, for a total of **\$6,210**.

### N5: Total Grants

Total Grants consists of Members Cash Contribution and the Estimated Accreditation Visits Cost  
Total Grants for 2025 = **\$402,157**

- Total Cash Contribution: **\$323,156**
  - ROAC = 50% of the Total Expenses
  - CCUSA= 50% of Total Expenses minus Accreditation Visits estimated Cost.

The total cash contribution includes the support for the reserve fund.

Member Cash Contribution/Year	2024	2025
ROAC	\$209,236	\$201,079
CCUSA	\$132,245	\$122,077
<b>Total</b>	<b>\$341,481</b>	<b>\$323,156</b>

Compared to 2024, Members Cash Contribution (including the reserve fund) will be lower than 2024 despite the CPI increase. It reflects the adjusted Accreditation Program Expenses impact on the CACB Overall Budget. Please see attached 2.4- Members' Grants Overview

- Estimated Accreditation Visits Cost: \$79,001 See Note N13

Member Contribution/Year	2024		2025	
	ROAC	CCUSA	ROAC	CCUSA
Cash Contribution	\$209,236	\$132,245	201,079	\$122,077
Estimated Accreditation Visits Cost		\$76,992		\$79,001
Total	\$209,236	\$209,236	201,079	201,079
<b>Grand Total</b>	<b>\$418,472</b>		<b>\$402,158</b>	

**N6: Other Incomes**

A total of **\$45,500** is anticipated as other incomes in 2025:

Academic Certification= \$41,500 and Accreditation Program= \$4,000.

**N7: Total Revenues**

The total revenues anticipated in 2025 for the 3 Programs will be higher than in the 2024 Year-End (YE) due to increase in the Certification Programs revenues.

Projections. The Total Revenues= **\$1,335,131**

Program/Total Revenues/year	2024 YE	2025
Academic Certification	\$611,321	\$643,250
BEFA Certification	\$248,789	\$279,259
Accreditation Program	\$423,198	\$406,157
Total	<b>\$1,283,308</b>	<b>\$1,328,666</b>

## EXPENSES

In 2025, the Programs Expense distribution rates have been adjusted to reflect each programs impact on overall CACB Expenses.

### N8: The Internet Technology

The Internet Technology Expense in 2025 will consist mainly of Maintenance Fees and Internet Security (2 factors Authentication). The Maintenance Fees will increase as per the 2.61% CPI rate.

Total Internet Technology= **\$39,764**

Program/	2024 YE	2025
Academic Certification	\$31,205	\$32,503
BEFA Certification	\$6,192	\$5,115
Accreditation Program	\$4,128	\$2,147
<b>Total</b>	<b>\$41,525</b>	<b>\$39,764</b>

### N9: Office

Office Expenses will be close to the 2024 Year-End Projection. Total Office = **\$193,743**

Program	2024YE	2025
Academic Certification	\$104,604	\$119,104
BEFA Certification	\$44,484	\$48,362
Accreditation Program	\$37,392	\$26,276
<b>Total</b>	<b>\$186,480</b>	<b>\$193,742</b>

### N10: Human Resources

The Human Resources Expense will increase as per the 2.61% CPI rate.

BEFA HR will increase with to reflect the addition of a resource for the implementation of the mentorship Program. Please see attached 2.2Impact Assessment-Implementation Mentorship Program.

Total Human Resources= **\$741,382**

Program	2024 YE	2025
Academic Certification	\$411,988	\$422,741
BEFA Certification	\$116,524	\$169,565
Accreditation Program	\$145,723	\$149,526
<b>Total</b>	<b>\$674,235</b>	<b>\$741,832</b>

### N11: Meetings

As per the projected 2024 year-end figures, the expense anticipated in 2025, will be adjusted to reflect the cost of the two in-person Board meetings. The In-Person BEFA Interviews, NAAB and Other meetings expenses will remain close to the 2024 figures. **Total Meetings= \$172,418:**

Academic Certification=\$25,602, BEFA=\$80,722, and Accreditation=\$66,094

Meetings /Year	2024YE	2025	Program/Meetings	2024 YE	2025
BEFA Interviews	\$72,366	\$72,366	Academic Certification	\$24,954	\$25,602
Board	\$71,802	\$73,676	BEFA Certification	\$80,825	\$80,722
NAAB	\$4,376	\$4,376	Accreditation Program	\$64,765	\$66,094
Workshop with the Members	\$20,000	\$20,000	<b>Total</b>	<b>\$170,544</b>	<b>\$172,418</b>
Other	\$2,000	\$2,000			
<b>Total</b>	<b>\$170,544</b>	<b>\$172,418</b>			

**N12: Workshops with the Members**

Specific Projects Item with a total of **\$20,000**.

The assumption is to budget for 2 meetings (Feb/Mar and Sept/Oct) each year with each member to engage them in the process. The composition of meetings would be the CACB Executive Committee, the Chair of ROAC, the Chair of the ROAC Standing Committee, and the ROAC administrator.

**N13: Accreditation Visits Estimated Cost**

As per the 2020-2025 Funding Agreement, the Accreditation Visits Estimated Cost is indexed annually according to the posted Canadian inflation rate. Accreditation Visits Estimated Cost in 2024 will increase as per the 2.61 % CPI rate. Accreditation Visits Estimated Cost= **\$79,001**

Accreditation Visits Estimated Cost	2024YE	2025
	\$76,992	\$79,001

**N14: Accreditation Visiting Teams**

The Accreditation Visiting Teams Expense is financed by the Members' Cash Contributions. It is assigned to the Core Visiting Teams and is indexed annually against the Canadian inflation rate.

Accreditation Visiting Teams: **\$26,344**

Accreditation Visiting Teams	2024YE	2025
	\$25,665	\$26,335

**N15: Training**

- Accreditation Program will resume its in-person training sessions in conjunction with RAIC Conferences to increase awareness about Accreditation and to attract more assessors to the Visiting Team Roster. Participants are eligible to ROAC Continuing Education points. **\$6,000** training is planned for 2025 Accreditation Team training session.
- Virtual Training Format is planned for the Academic Certification Assessment Committee Members to familiarize themselves with the updated CES Requirements.
- No in-person training is planned for BEFA Assessors. All recent new assessors received will have been trained virtually by the end of 2024 and will be assigned as observers on the 2024 November Interview Session.

**N16: Assessors Honorarium Program**

Subject to Members' approval, the program will come into effect in 2025. It is part of the CACB's 2022-2025 strategic plan and aims to promote, retain, and recognize the volunteers who assist us in operating our three programs: Academic Certification, BEFA, and Accreditation.

The implementation of the program will impact the overall budget by increasing expenses by **\$50,600**. As part of the CACB's proposed approach for Reserve Funds Surplus Management, this amount will be offset by the Reserve Funds Surplus for 2025 and 2026; however, this expense should eventually be self-funded (see note N23).

Please see the attached 2.3-CACB-Proposed Honorarium Program for more details.

The budget show the Honorarium per program in the following distribution:

Program	2025
Academic Certification	\$13,200
BEFA Certification	\$20,000
Accreditation Program	\$17,400 (\$5,800 *3 Accreditation Visits)
<b>Total</b>	<b>\$50,600</b>



**N17 Amortization**

Amortization is provided at the following methods and annual rates:

- Furniture - 10 years
- Computer equipment - 3 years
- Leasehold improvements - 10 years

The Amortization for 2025 will be applied to Furniture and Leasehold improvement. The projection for 2025 is a total of **\$10,500**.

Program	2025
Academic Certification	\$8,400
BEFA Certification	\$1,575
Accreditation Program	\$525
<b>Total</b>	<b>\$10,500</b>

**N18: Sub-Total Operational Expenses**

The total projected in 2024 of operational expenses for the 3 programs projected is **\$ 1,157,569**

Program	2024 YE	2025
Academic Certification	\$592,927	\$621,550
BEFA Certification	\$249,525	\$325,339
Accreditation Program	\$378,315	\$362,205
<b>Total</b>	<b>\$1,220,767</b>	<b>\$1,309,094</b>

**N19: Canberra Accord**

The Canberra Accord expense estimated for 2025 is **\$27,423**. This includes the Secretariat's Annual Fees contribution and attending the in-person AGM to be hosted by NBAA, in China.

**N20: 2022-2025 Strategic Plan Implementation**

**\$20,000** are projected to assist with the Strategic Plan Implementation for professional services as required.

**N21: Research Initiatives**

**\$7,500** is assigned for 2025 to match up any response to the Research Committee call for partners to undertake research initiatives as they relate to Accreditation and Certification.

**N22: Total Expenses**

In 2025, the Programs Expense distribution rates have been adjusted to reflect each programs impact on overall CACB Expense Lines. The Total Expenses forecasted in 2025 for the 3 programs will be **\$1,364,017** with the following distribution per Program.

Program/Total Expenses/year	2024 YE	2025
Academic Certification	\$602,000	\$630,031
BEFA Certification	\$249,525	\$331,739
Accreditation Program	\$421,869	\$402,247
<b>Total</b>	<b>\$1,273,394</b>	<b>\$1,364,017</b>

## NET INCOME

### N23: Net Income

Total Net Income for the 3 Programs:

Program/Total Net Income/year	2024YE	2025
Academic Certification	\$8,438	\$13,219
BEFA Certification	\$540	-\$52,480
Accreditation Program	\$6,337	-\$7,190
<b>Total</b>	<b>\$15,315</b>	<b>-\$46,451</b>

The BEFA deficit of \$52,480 comprises the following:

- Extra Human Resources for the BEFA Mentorship Program: \$32,480
- Honorarium Program expense: \$20,000

The Accreditation Program deficit consists of the Honorarium Program expense of \$17,400: 3 Accreditation Visits at \$5,800 per visit for 5 Team Members)

While the deficit generated by the Honorarium Program will be covered by the Reserve Funds Surplus for 2025 and 2026, the goal is for this expense to be self-funded. See attached the Honorarium Program Proposal.

Program/Total Net Income/year	2025 Net Income with Honorarium Program	Surplus Reserve Funds Offset	2025 Net Income
Academic Certification	\$13,219	\$13,200	\$26,419
BEFA Certification	-\$52,480	\$20,000	-\$32,480
Accreditation Program	-\$7,190	\$17,400	\$10,210
<b>Total</b>	<b>-\$46,451</b>	<b>\$50,600</b>	<b>\$4,149</b>

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# Memorandum

**To:** Council

Settimo Vilardi	Loloa Alkasawat
Donald Ardiel	J. William Birdsell
Jim Butticci	Kimberly Fawcett-Smith
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Speigel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 4.3

**From:** Kristi Doyle, Executive Director

**Date:** January 13, 2025

**Subject:** Amendments to OAA Bylaws and Schedule A

**Objective:** Council to review and approve proposed amendments to the OAA Bylaws and Schedule A to the Bylaws to address Limited Licences.

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## Background

With the proclamation of changes to the *Architects Act* to allow for the issuance of Limited Licences via the recently filed amendments to Regulation 27 updates to the OAA Bylaws are necessary. This also includes changes to the schedule of fees under the Bylaws. The amendments are consistent with the content of the Bylaws prior to the pause of the OAA Technology Program and the May 2023 Court Order.

With guidance from Legal Counsel, the Bylaws and Schedule A have been redlined with the necessary changes and are attached for Council's review and approval.

A minor housekeeping amendment has also been included to reflect the move to a virtual format for the Annual General Meeting.

The Bylaws and Schedule will be subject to ratification by the members at the next Annual General Meeting.

---

## Action

*It was moved by ... and seconded by .... that the proposed amendments to the OAA Bylaws and Schedule A under the OAA Bylaws be approved as circulated reflecting the inclusion of holders of a Limited Licence and Intern Technologists.*

**Attachments**

OAA Bylaws redlined.

Schedule A redlined.

---

# Bylaws Under the *Architects Act*

Bylaws relating to the administrative and domestic affairs of the Ontario Association of Architects.

BE IT ENACTED as Bylaws of the Ontario Association of Architects (hereinafter called the "Association") as follows:

## INTERPRETATION

1. In this Bylaw and all other bylaws of the Association hereafter passed, unless the context otherwise requires:
  - (a) "Act" means the *Architects Act*;
  - (b) "bylaws" means this Bylaw and all other bylaws which may be passed under the provisions of Section 8 of the Act;
  - (c) "Council" means the Council of the Association;
  - (d) "Executive Director" means the Executive Director of the Association;
  - (e) "The Manager, Finance" means the Manager, Finance of the Association;
  - (f) "proxy" means a completed and executed proxy in Form 1 or Form 2;
  - (g) "regulations" means the regulations passed under Section 7 of the Act;
  - (h) expressions used herein, unless the contrary intention appears, have the same meanings as in the Act and the regulations;
  - (i) wherever reference is made to any statute, regulation or section thereof, such reference shall be deemed to extend and apply to any amendment or to any re-enactment of such statute, regulation or section as the case may be; and
  - (j) words that imply gender shall be referred to in the plural as they or them or their.

## SEAL

2. The Seal of the Association in use on the day this bylaw comes into force, which contains the words "ONTARIO ASSOCIATION OF ARCHITECTS" shall continue to be the official seal of the Association and shall be kept in the custody of the Executive Director at the head office of the Association.

## DUTIES OF OFFICERS

### 3. The President

It shall be the duty of the President:

- (a) to perform all duties usual to the office of the President;
- (b) to preside at all meetings of the members of the Association, the Council and the Executive Committee;
- (c) to be the official representative and spokesperson for the Association;
- (d) to serve as an ex-officio member of all additional or special committees other than the committees established by the regulations and attend such meetings as may from time to time be required;
- (e) to instruct the Executive Director with respect to the calling of meetings of the members of the Association, the Council and the Executive Committee; and
- (f) to receive policy direction from the Council and report to the Council.

### 4. Vice-Presidents

It shall be the duty of the Vice-Presidents to perform such duties as the Council from time to time may require.

### 5. Senior Vice-President and Treasurer

It shall be the duty of the Senior Vice-President and Treasurer:

- (a) to supervise and report to the Council on the financial affairs of the Association at such times and in such manner as the Council may require; and
- (b) to perform all of the duties of the President in their absence.

### 6. Terms of Office

The term of office of the President, the Senior Vice-President and Treasurer and the Vice-Presidents shall commence on the day following their election and shall end on the day of election of their respective successors.



## **DUTIES OF MEMBERS OF THE COUNCIL**

7. Each member of the Council shall comply with the provisions of the Act, the regulations and the bylaws, and shall exercise the powers and discharge the duties of their office honestly and in good faith and shall exercise the same degree of care, diligence and skill that a reasonable and prudent person would exercise in comparable circumstances in furtherance of the objects of the Association in order that the public interest may be served and protected. Each member of the Council shall:
  - (a) familiarize themselves with the Act, the regulations and the bylaws and with such other records and documents as may be necessary as background knowledge for the purpose of performing the duties of their office;
  - (b) attend every meeting of the Council and take part in the discussions and decisions taken at its meetings unless unavoidably detained by illness, urgent prior commitment or other emergency;
  - (c) serve on the committees which the Council may appoint under the provisions of the Act;
  - (d) be present at and participate in the annual or other general meetings of the members of the Association;
  - (e) provide liaison personally or as an alternate to at least one committee or task force, the meetings of which they shall attend unless unavoidably detained by illness, urgent prior commitment or other emergency;
  - (f) provide guidance to such committee or task force and its Chair whenever necessary and, if requested, prepare a written report for the next meeting of the Council as to the activities, concerns and intentions of the committee or task force;
  - (g) take an active role in the affairs of the Societies in the electoral district within which they have an address of record, including appearances at Society meetings as a representative of the Council;
  - (h) perform such duties as may be requested by the Council with respect to liaison with other organizations and to act as a representative on joint committees and task forces and at other functions in the electoral district within which they have an address of record;
  - (i) disclose any interest they may have, other than as a member of the Council, in any matter coming

before the Council, a committee or task force and thereafter withdraw from its meeting and not vote nor be counted in the quorum in respect of such matter;

- (j) ensure that confidential matters coming to their attention as a member of the Council are not disclosed by them except as required for the performance of their duties or as may be directed by the Council and preserve secrecy with respect to all matters that come to their knowledge in the course of their duties in accordance with the Act;
- (k) devote whatever time is reasonably necessary to properly perform their duties as a member of the Council; and
- (l) perform such other duties as from time to time may be agreed upon between them and the Council.
- (m) comply with all applicable workplace laws and policies

## **MEETINGS OF THE COUNCIL**

8. There shall be not less than four (4) meetings of the Council in each year.
9. Meetings of the Council may be called by the Council, the Executive Committee, the President, or in their absence, the Senior Vice-President and Treasurer.
10. Meetings of the Council may be held at such place or places as the Council may from time to time determine.
11. A special meeting of the Council may be called by the Executive Director if they are directed to do so in writing, signed by at least four (4) members of the Council other than the President or the Senior Vice-President and Treasurer.
12. Notice of the meetings of the Council shall be given by the Executive Director on the direction of the President, the Senior Vice-President and Treasurer, or the Executive Committee and shall be delivered, mailed, telephoned or sent by other form of communication to each member of the Council not less than one (1) day before the meeting is to take place. Notice of any special meeting will be given not less than five (5) days before the meeting is to take place but no formal notice of any meeting shall be necessary if all members of the Council agree to accept shorter notice or waive notice entirely. The statutory declaration of the President, the Senior Vice-President and Treasurer or the Executive Director that notice has been given pursuant to this bylaw shall be sufficient and conclusive evidence of the giving of such notice



13. The order of business at meetings of the Council shall be such as the Council may establish from time to time.
  14. Questions arising at any meetings of the Council shall be decided by a majority of votes. In case of an equality of votes, the Chair, in addition to their original vote, shall have a second or casting vote.
  15. No question or matter that has been decided by a majority of votes at a meeting of the Council in a calendar year shall be reviewed or re-examined at any subsequent meeting of the Council in the same calendar year unless at least two-thirds of the members of the Council present at that subsequent meeting agree to do so.
  16. All Council meetings shall be open to the public except for the in-camera portion of any Council meeting. Matters to be considered in-camera include:
    - 1) Issues related to Association personnel;
    - 2) Litigation or matters in anticipation of litigation;
    - 3) Negotiations with a government, other association or governing body for architects or other professionals;
    - 4) Financial and personal matters where Council believes the need for privacy outweighs the public interest in disclosure; and
    - 5) Any other matter identified by the Executive Committee and agreed to by Council.
  17. The transactions of the Council or of any committee are valid notwithstanding the disqualification of any member thereof through any defect or irregularity in their election or appointment. No error or omission in giving notice for a meeting of the Council shall invalidate such meeting and any member of the Council may at any time waive notice of any such meeting and may ratify or approve any or all of the proceedings taken or had thereat.
- (50) members of the Association ~~out of whom not more than five (5) of whom are holders of a Limited Licence~~ who may sign a requisition for that purpose addressed to the Executive Director and shall be held at such place and at such times as shall be determined by the Council.
20. Preliminary notice of the annual meeting shall be given in the official publication on the Association Website and by email at least ten (10) weeks before the date fixed for the meeting.
  21. Within thirty (30) days of the publication of the preliminary notice of the annual meeting, notice in writing by mail or email shall be given to the Executive Director of any motions to be made at the meeting which shall be signed by at least ten (10) members not more than two (2) of whom are holders of a Limited Licence in good standing in the Association.
  22. Formal notice of the annual meeting shall be given by the Executive Director to each member of the Association by sending the notice of such meeting by posting it on the Association website and by email at least twenty-one (21) days before the date fixed for the holding of the meeting and shall include notice of motions to be made at the meeting and the date by which proxies must be deposited with the Executive Director.
  23. Any motions that are to be made at the annual meeting shall be:
    - (a) worded in the affirmative;
    - (b) contain only one proposition; and
    - (c) contain no unnecessary provisions.
  24. Any resolution duly passed at the annual meeting or a general meeting called pursuant to a requisition signed by fifty (50) members in good standing, not more than five (5) of whom are holders of a Limited Licence in the Association must be considered by the Council within three (3) months of the meeting but is not binding on the Council.
  25. Notice of the time, place, and purpose of a general meeting of the members of the Association other than the annual meeting, shall be given by the Executive Director on the direction of the Council, to each member of the Association by sending the notice of such meeting by email and by posting it on the Association Website at least twenty-one (21) days before the time fixed for the holding of the meeting.
  26. Notice of any general meeting called by the Council or by requisition signed by fifty (50) members who are in good standing not more than five (5) of whom are

## MEETINGS OF MEMBERS OF THE ASSOCIATION

18. An annual meeting of the members of the Association shall be called by the Council and held no more than fifteen (15) months after the holding of the last preceding annual meeting, and may be held at such place and at such times as shall be determined by the Council for the purpose of laying before the members the reports of the Council and the annual report of the Association in order to inform members of matters relating to the affairs of the Association.
19. Other general meetings of the members of the Association may be called by the Council or by any fifty



holders of a Limited Licence in the Association, shall indicate the purpose of and the matters to be brought before the meeting.

27. All notices required to be given to the members of the Association shall be deemed to have been regularly given if posted to the Association Website and delivered by email at their email address of record. A statutory declaration by the Executive Director or by any person acting on behalf of them shall be conclusive evidence of the delivery of notices of meetings of members or the publication thereof on the Association Website containing such notice.
28. The order of business at the annual meeting of the members of the Association shall be:
  - (a) the adoption of minutes of the previous meeting;
  - (b) business arising out of the minutes;
  - (c) considering reports of the Council and the annual report of the Association;
  - (d) receipt of the auditor's report;
  - (e) appointment of auditors and fixing their remuneration or authorizing the Council to fix their remuneration for the ensuing year;
  - (f) confirmation of bylaws passed by the Council since the last annual meeting of members of the Association; and
  - (g) such other general business, if any, as may properly come before the meeting.

The validity of actions taken at annual meetings of members of the Association shall not be affected by reason of failure to adhere to the order of business set out in this section.

29. The order of business at other general meetings of the members of the Association shall be determined by the Council, or if not so determined by the Council, then by the Chair of the meeting.
30. Fifty (50) members in good standing, not more than five (5) of whom are holders of a Limited Licence of the Association constitute a quorum at an annual or general meeting.
31. Every member who is in good standing in the Association is entitled to one vote either in person or by proxy at any annual or general meeting.
32. Members in good standing, persons whose interests are related to those of the Association as defined by the regulations, and guests as identified by the Council, may participate in any annual or general meeting.

## GENERAL PROVISIONS AS TO MEETINGS

33. In the absence of proof to the contrary, minutes of any meeting of the members of the Association or the Council, purporting to be signed by the President, the Senior Vice-President and Treasurer or the Executive Director, or in the case of a committee, by the Chair of the committee, shall be deemed to be a correct record of the proceedings at the meeting.
34. The President or in their absence, the Senior Vice-President and Treasurer, shall preside at the annual or general meetings of the members of the Association.
35. Subject to the discretion of the Chair presiding at the annual or general meeting of the members of the Association, discussion of any particular motion will be governed by the following rules:
  - (a) one address by the mover of five minutes duration and a seconder of two minutes duration in submitting the motion;
  - (b) one address by any member of the Association of two minutes duration for or against the motion; and
  - (c) a reply by the mover of three minutes duration.
36. The procedure at all meetings of the Association shall be governed by the rules laid down in "Roberts, Rules of Order," (most recent edition) except as otherwise set out in the bylaws, provided that no action of the Association shall be invalid by reason only of an inadvertent failure to adhere to such rules.
37. Meetings of the Council and committees may be held, except in a proceeding in respect of a licence, limited licence, certificate of practice or temporary licence, by means of conference call or other communication means by means of which all persons participating in the meeting can communicate simultaneously and instantaneously.
38. The Council or any committee other than the Academic Requirements Committee, the Experience Requirements Committee, the Registration Committee, the Complaints Committee or the Discipline Committee, may take action by signed resolution of all the members of the Council or committee, as the case may be.
39. Council may submit any matter relating to the affairs of the Association to the members to be voted upon at an annual or general meeting either by ballot or by show of hands in order to secure the approval of or an expression of opinion from the members and may submit such matters to the members to be voted upon by a letter ballot.





## PROXIES

40. (1) Every member in good standing in the Association may by means of a proxy (Form 1), appoint another member in good standing in the Association to attend and act at a meeting of the members of the Association in the manner and to the extent and with the powers conferred by the proxy.

(2) The Council may by resolution, fix a time not exceeding forty-eight (48) hours excluding Saturdays, Sundays and holidays, preceding any meeting or adjourned meeting of members of the Association, before which time proxies to be used at that meeting must be deposited with or faxed to the Executive Director and any period of time so fixed shall be specified in the notice calling the meeting.

(3) A member may revoke a proxy by depositing or faxing an instrument in writing executed by them personally:

- (a) at the offices of the Association at any time up to and including the last business day preceding the day of the meeting or any adjournment thereof, at which the proxy is to be used; or
- (b) with the Chair of the meeting on the day of the meeting or any adjournment thereof.

(4) A member who is appointed a proxy holder shall attend ~~in person at~~ the meeting in respect of which the proxy is given and comply with the directions of the member who appointed them.

(5) A direction given by a member who appoints a proxy holder shall specify on the form of proxy (Form 1):

- (a) how the proxy holder is to vote in respect of each matter or group of related matters identified in the notice calling the meeting; or
- (b) that the proxy holder may vote on any matter or group of related matters specified in the notice calling the meeting or other matters that may properly come before the meeting in accordance with his or her discretion.

(6) A proxy holder has the same rights as the member who appointed them to speak at a meeting in respect of any matter and to vote by way of ballot, if any, at the meeting and except where a proxy holder has conflicting instructions from more than one member to vote at such a meeting in respect of any matter by means of a show of hands.

(7) A member is in good standing in the Association for the purposes of this section where:

- (a) the member is not in default of payment of any fee prescribed by the bylaws or any fee, levy, or costs imposed under the Act or the regulations;
- (b) the member's professional conduct or competence is not the subject of proceedings before the Discipline Committee; and
- (c) the member's licence or limited licence is not under suspension.

## COMMITTEES

41. In addition to the committees prescribed by the Act, the Council may also from time to time appoint such other additional or special committees as it considers desirable to assist it in the management of the affairs of the Association, such as but not limited to:

- (a) Communications and Public Education Committee;
- (b) Finance and Audit Committee;
- (c) Governance and HR Committee;
- (d) Policy Advisory Coordination Team; and
- (e) Practice Resource Committee;

42. The Council shall appoint at its pleasure the members of the committees under this Bylaw who shall be members of the Association, intern architects or intern technologists and each committee shall perform such duties as the Council may from time to time prescribe.

43. The President shall be an ex-officio member of all committees appointed under this bylaw.

44. Subject to the provisions of the Act, the regulations and the bylaws, each committee shall determine the manner in which meetings of the committee shall be convened and the procedure at such meetings.

## REMUNERATION OF MEMBERS OF THE COUNCIL AND COMMITTEES

45. The Council may authorize or provide for:

- (a) payment of reasonable travelling and other expenses properly incurred by members of the Council and committees;
- (b) payment of reasonable travelling and other expenses of any member of the Association appointed by the Council to act on behalf of the Association as a representative of the Association or performing tasks on behalf of the Association upon the direction of the Council or the Executive Director;



- (c) payment of remuneration to the President, Senior Vice-President and Treasurer and members of committees.

### **OFFICIALS AND EMPLOYEES**

- 46. The Executive Director, the Registrar, the Deputy Registrars, and such other officials as may be appointed by the Council under subsection 3(8) of the Act, shall, in addition to their duties under the Act or the regulations, have such duties as the Council may determine from time to time.
- 47. The Council may employ or may authorize the Executive Director to employ such other persons as may be considered desirable or necessary to carry out the general operations of the Association and the conduct of its affairs.
- 48. The Association may enter into contracts of employment with any official appointed by the Council, which may provide for such remuneration and terms and conditions of employment and other matters as may be approved by the Council and may enter into such contracts of employment with other employees of the Association.
- 49. The Executive Director shall:
  - (a) perform all duties usual to the office of the secretary of a corporation;
  - (b) be the custodian of the Seal of the Association and of all books, papers, records, correspondence, contracts and other documents belonging to the Association;
  - (c) subject to the direction of the Council, supervise and manage the Association's lands and buildings;
  - (d) attend all meetings of the members of the Association, the Council and the Executive Committee, and record the proceedings at such meetings and enter the same in a book kept for that purpose;
  - (e) keep or cause to be kept full and accurate books of accounts and accounting records for all financial and other transactions;
  - (f) control the receipts and disbursements of the Association's funds and the safekeeping of its securities;
  - (g) deposit or cause to be deposited the monies of the Association in an account or accounts in the Association's name in a chartered bank or trust company;

- (h) periodically report to Council on the financial affairs of the general activities of the Association;
- (i) report directly to Council and work with the President to implement the decisions and directions of the Council in accordance with the mission and mandate of the Association; and
- (j) perform such other duties as the Council may determine from time to time.

- 50. The Executive Director, the Registrar and the Senior Vice-President and Treasurer and other employees and signing officers of the Association may be bonded under fidelity bonds of guarantee companies in such amounts as may be approved and determined by the Council from time to time. The cost of all such bonds shall be paid by the Association.

### **BANKING AND FINANCE**

- 51. All monies received by or on behalf of the Association shall be deposited in the name of the Association in one or more chartered banks or trust companies designated by the Council.
- 52. All payments from the funds of the Association shall be made by cheque or negotiable instrument drawn on one or more of the Association's accounts. All cheques or negotiable instruments not exceeding \$5,000.00 shall be signed in the name of the Association by either the Executive Director or the Registrar. All cheques or negotiable instruments exceeding \$5,000.00 but not exceeding \$20,000.00 shall be signed in the name of the Association by the Executive Director, and the Registrar or in the absence of one of them, by the Manager, Finance. All cheques or negotiable instruments exceeding \$20,000.00 shall be signed in the name of the Association by either the Executive Director or the Registrar and, in addition, by an officer of the Association.

### **APPLICATION OF FUNDS AND ADMINISTRATION OF PROPERTY**

- 53. The Council may approve, or may authorize or provide for the application of funds of the Association in payment of, all expenses properly incurred in the conduct of the affairs of the Association, including, without limiting the generality of the foregoing:
  - (a) payment of all expenses incurred in connection with the duties imposed on the Association under the Act and in pursuance of the objects of the Association, including expenses in connection with applications for licences, limited licences



certificates of practice, certificates of practice issued under the Act, and temporary licences, the maintaining of registers by the Registrar, meetings and hearings under the Act and appeals therefrom and proceedings with respect to offences or violations under the Act; and

- (b) payment of remuneration of officials and employees of the Association and payment of all other expenses including the cost of maintenance of premises incurred in the operation of the offices of the Association.
- (c) payment, authorized by Council, for the making of grants that:
  - i. advances the knowledge of architectural education; or
  - ii. maintains or improves the standards of practice in architecture; or
  - iii. that supports and encourages public information and interest in the role of architecture in society.

54. Funds of the Association not immediately required may be invested and reinvested in any investments that may from time to time be authorized investments for joint stock insurance companies and cash mutual insurance corporations under the *Corporations Act*.

55. All shares and securities owned by the Association shall be registered in the name of the Association and shall be lodged with a chartered bank or trust company or in a safety deposit box subject to access only by the President, the Senior Vice-President and Treasurer, the Executive Director, the Registrar, or such other person as may be specifically authorized by the Council.

56. Without in any way derogating from the powers otherwise conferred upon the Council, the Council is expressly empowered from time to time to purchase, lease or otherwise acquire, sell, exchange or otherwise dispose of shares, stocks, rights, warrants, options and other securities, lands, buildings and other property, moveable or immovable, real or personal, or any interest therein owned by the Association, for such consideration and upon such terms and conditions as the Council may deem advisable.

57. Deeds, transfers, contracts and other instruments requiring the signature of the Association, shall be signed by the President or the Senior Vice-President and Treasurer and the Executive Director, or in the absence of the Executive Director, by an elected member of the Council and the Seal of the Association

shall be affixed to such instruments as may be required.

58. The Council may from time to time:

- (a) borrow money upon the credit of the Association by obtaining loans or advances or by way of overdraft or otherwise;
- (b) sell or pledge any securities owned by the Association, including bonds, debentures or debenture stock, for such sums or on such terms and at such prices as they may deem expedient;
- (c) assign, transfer, convey, hypothecate, mortgage, pledge, charge or give security in any manner, upon all or any of the real or personal, moveable or immovable property, rights, powers, choses in action, or other assets, present or future of the Association; to secure any such securities or other securities of the Association, or any money borrowed or to be borrowed or any obligations or liabilities as aforesaid or otherwise of the Association heretofore, now or hereafter made or incurred directly or indirectly or otherwise.

59. Any or all of the powers set forth in sections 56, 57 and 60 may from time to time be delegated by the Council to the Executive Director, or in their absence to the Registrar.

60. The provisions of Sections 60 and 61 shall remain in force and be binding upon the Association as regards any person acting on the faith thereof until such person has received written notification from the Association and that such provisions have been repealed or replaced.

## FINANCIAL YEAR

61. The financial year of the Association shall end on the 30th day of November in each year.

## FINANCIAL STATEMENTS

62. The Council shall lay before each annual meeting of the members a financial statement for the previous financial year of the Association, made up of a balance sheet as at the end of such financial year and statements of revenue and expenses and statements of changes in the financial position of the Association for such financial year together with the report of the Association's auditor on the financial statement. The



financial statement with a summary of the auditor's report shall be published in the Association's Annual Report for the financial year.

### **AUDITORS**

63. The members at each annual meeting shall appoint an auditor who shall be chartered professional accountants to hold office until the next annual meeting and if an appointment is not so made, the auditor in office shall continue in office until a successor is appointed.
64. The remuneration of the auditor or auditors shall be fixed by the members at the annual meeting or by the Council if they are authorized to do so by the members at the annual meeting.

### **SOCIETIES**

65. The Societies in existence when this bylaw comes into force are continued as Societies of the Association with areas constituted by their present boundaries until the Council shall determine otherwise and the constitution and/or bylaws of each such Society in effect at the date when this bylaw comes into force shall continue in effect until rescinded or amended in accordance with the provisions for rescission or amendment contained in such constitution or bylaws.
66. Any five (5) members of the Association residing in one locality may with the approval of the Council, form a Society of the Association with 'offices' at such place as they may select, provided that the territory of a new Society does not encroach upon the territory of an existing Society. Should any question of encroachment between the territories of two Societies arise, the same shall be settled by the Council.
67. The Council may establish from time to time standard rules and procedures governing the operation of Societies and the conduct of their affairs.
68. Subject to the provisions of the Act, the bylaws and any standard rules of procedures established under Section 70, each Society may fix dues for its members and may pass bylaws governing its operations and respecting the conduct of its affairs including provisions for amendment of such bylaws. A copy of all such bylaws and amendments thereto shall be filed with the Executive Director.
69. A bylaw passed by a Society and any amendments thereto is not effective until it has been filed with the OAA.

70. Each calendar year, every Society shall file a report of its activities for the year, which shall include a financial reporting as well as the number of members and affiliates of the Society, with the Executive Director on the date prescribed by the OAA.
71. The Societies may provide for the admission of persons who are not members of the Association who shall be designated as affiliates of the Society, but no person who is not a member of the Association, other than one intern architect, may be an officer of a Society.
72. No officer, member, or affiliate of a Society, nor any Society, shall have any power or authority as such to contract in the name of the Association nor to assume any obligations on behalf of the Association and the Association shall have no liability with respect to any debts or obligations assumed or incurred by any Society.
73. The Council may from time to time declare any Society inactive and suspend its operation or dissolve any Society and provide for the transfer of the members and assets of any such Society to another Society or Societies.
74. If a Society shall be dissolved or ceases to exist for any other reason, or is declared inactive by the Council, all assets of that Society, unless otherwise directed by the Council shall vest in the Association and shall be delivered over by the governing body of the Society to the Senior Vice-President and Treasurer of the Association forthwith on demand.
75. The Council may periodically authorize the making of grants to Societies in such amounts and for activities that:
  - (a) advance the knowledge of architectural education; or
  - (b) maintain or improve the standards of practice in architecture; or
  - (c) that support and encourage public information and interest in the role of architecture in Society;
  - (d) such purposes as it considers appropriate.

### **GROUP INSURANCE PLANS**

76. The Association may from time to time establish group insurance plans, other than for professional liability, in which members of the Association may participate on a voluntary basis.



## SCHOLARSHIPS, BURSARIES AND PRIZES

77. Such scholarships, bursaries, and prizes may be awarded from time to time as are authorized by the Council.

## FEES

78. The fees and levies set out in Schedule "A" to this bylaw are payable by applicants for licences, limited licences, certificates of practice, certificates of practice issued under the Act and temporary licences and by members and holders, associates, intern architects, student associates, retired members, and intern technologists in the circumstances, at the times and in the amounts specified.

## PREMIUMS AND DEDUCTIBLES

79. The premiums, levies and deductibles set out in Schedule B to this Bylaw are payable to Pro-Demnity Insurance Company by holders of certificates of practice and members of the Association in the circumstances, and at the time specified.

## INDEMNIFICATION

80. Every present and former member of the Council and every present and former officer, member or employee of the Association, and their heirs, executors and administrators, and estate and effects respectively, shall be indemnified and saved harmless out of the funds of the Association, from and against,

- (a) all costs, charges and expenses whatsoever that they sustain or incur in or about any action, suit or proceeding that is brought, commenced or prosecuted against them, for or in respect of any deed, matter or thing whatsoever, made, done or permitted by them, in or about the execution of the duties of their office, employment or appointment; and
- (b) all other costs, charges, and expenses that they sustain or incur in or about or in relation to the affairs thereof, except such costs, charges, or expenses as are occasioned by their own willful neglect or default.

81. Every bylaw passed by the Council shall be signed by the President or the Senior Vice-President and Treasurer and the Executive Director and shall bear the seal of the Association.

82. The Executive Director shall incorporate all past and future amendments to the bylaws into a Consolidated Bylaw, which Consolidated Bylaw shall contain the date of last amendment on its face.

83. The Executive Director may from time to time update the Consolidated Bylaw by updating references to other legislation and by updating gender references to include all gender.- No such change shall be substantive or change the meaning of the provisions. The Executive Director shall report any such updates to the Council and post them on the website of the Association.

PASSED BY THE COUNCIL OF THE ONTARIO ASSOCIATION OF ARCHITECTS AND SEALED WITH THE SEAL OF THE ASSOCIATION THIS 23<sup>6<sup>th</sup></sup> DAY OF January December, 20254.

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Executive Director

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President





## SCHEDULE A OAA Bylaws Fees

### Licence and Limited Licence

#### Architect, Licensed Technologist, Non-Practising

On filing of application	\$333.00
On filing of re-application (by a person who previously resigned their membership)	\$182.00
On referral of application to the Experience Requirements Committee	\$303.00
On filing of application to Council for Exemption Pursuant to Section 33 of Regulation 27 R.R.O. 1990	\$545.00
On reinstatement	\$454.00
New Certificate	\$ 30.00

#### Notes:

The Reinstatement fee is payable by every person whose Licence or Limited Licence was previously cancelled, whether or not the person is, on the date of the application, a member of another provincial association of architects in Canada or licensed as an architect with any state licensing board in the United States of America.

The applicant for Reapplication/Reinstatement of a Licence or Limited Licence must pay, in addition to the Reapplication/Reinstatement fee set out, all fees, premiums, levies, and deductibles in arrears on the date of cancellation and the annual fees prescribed by the Bylaws for the two years before the date of application, except that no payment is required for the first year after the date of resignation.

The following annual Licence and Limited Licence fees shall be payable on the 2<sup>nd</sup> day of January each year:

<b>Architect</b>	\$1,011.00
<u>Licensed Technologist</u>	<u>\$710.00</u>
<b>Non-Practising <u>Architect</u>Status</b>	\$505.50

#### Notes:

Persons who become members after July 1<sup>st</sup> in each year shall pay one-half of the applicable annual fee.

Payment received between March 1<sup>st</sup> and March 31<sup>st</sup> shall be subject to a late payment penalty of \$182.00

If payment of the annual fee and late payment penalty fee is not received by March 31<sup>st</sup>, the Licence or Limited Licence ~~shall~~ may be cancelled on April 1<sup>st</sup>.

The applicant for reapplication of a Licence or Limited Licence must pay, in addition to the reapplication fee set out, all fees, premiums, levies, and deductibles in arrears on the date of resignation. Every applicant for a Licence or Limited Licence shall pay all fees set out in this Bylaw that are in arrears on the date of the application.

### Temporary Licence

On filing of application	\$ 484.00
On issue	\$2,502.00
On renewal	\$2,502.00

### Retired Member, Student Associate, Intern Architect, Intern Technologist, Student Technologist

The following annual fees shall be payable:

<b>Retired Member</b>	\$75.00
<b>Student Associate</b>	No charge
<b>Intern Architect</b>	\$193.00
<b>Intern Architect with 5+ years Intern status</b>	\$1,011.00
<u><b>Intern Technologist</b></u>	<u>\$193.00</u>
<u><b>Student Technologist</b></u>	<u>No Charge</u>

Note:

Persons who are appointed as Intern Architects or Intern Technologists after July 1 in each year shall pay one-half of the applicable annual fee.

Every Intern Architect or Intern Technologist shall pay all fees set out in this Bylaw that are in arrears prior to the date of their reappointment.

### Certificate of Practice

#### **Architect – Certificate of Practice**

On filing of application	\$303.00
Annual Fees – based on the number of Architects <u>and Licensed Technologists</u> in the practice	
• practice with one Architect	\$515.00
• fee for each additional Architect within the practice add	\$386.00
• <u>fee for each additional Licensed Technologist within the practice add</u>	<u>\$257.50</u>

#### **Licensed Technologist – Certificate of Practice**

<u>On filing of application</u>	<u>\$303.00</u>
<u>Annual Fees – based on the number of Licensed Technologists and Architects in the practice</u>	
• <u>practice with one Licensed Technologist</u>	<u>\$365.00</u>
• <u>fee for each additional Licensed Technologist within the practice or Architect add</u>	<u>\$257.50</u>
On opening of an office other than the registered or principal office	\$121.00

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The annual Certificate of Practice Fee shall be payable on the filing of the application and thereafter on the 1<sup>st</sup> day of March in each year.

If payment of the annual fee is not received by May 1 the Certificate of Practice ~~shall~~ may be cancelled on May 2. Applications for Certificates of Practice filed after August 1<sup>st</sup> in each year shall pay one-half of the annual fee.

**Temporary Certificate of Practice** Issued Under the *Architects Act*, R.S.O. 1990, c. A. 26, s. 23

On filing of application	\$ 484.00
On issue	\$4,378.00
On renewal	\$4,378.00

**Other – Certificate of Practice**

Change of Name	\$ 303.00
New Certificate	\$ 30.00

**Admission Course**

On application to attend the Admission Course	\$ 354.00
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**Canadian Experience Record Book and Experience Record Book – Late Submission**

The following Late Submission Charges apply to experience records which are not submitted within eight weeks of the date of the last entry:

For every 1000 hours or portion thereof	\$ 121.00
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**Members and Interns Architects on Leave of Absence**

The following fees are payable by members ~~and~~ Intern Architects and Intern Technologists -who have been granted a leave of absence:

Where the leave of absence commences between the first day of January and the last day of February and no annual fee has been paid for the calendar year	\$ 75.00
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For a leave period that starts part of the way through the calendar year, where the full annual fee for the year has already been paid, the fees would be calculated to be consistent with the existing Council Refund Policy where the leave period starts as follows:

**Architects, Licensed Technologists, Non-Practising Architects members, and Intern Architects Over 5 Years:**

January 1 until February 28 – Full membership annual fee refunded, minus the

March 1 until March 31 –  $\frac{3}{4}$  of the membership annual fee, minus the annual leave

April 1 until June 30 –  $\frac{1}{2}$  of the membership annual fee, minus the annual leave fee



July 1 until September 30 – ¼ of the membership-annual fee, minus the annual

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October 1 until December 31 – no refund, but the annual fee for the next calendar year would be based on the full one-year annual leave period fee minus the annual

### **Fee for Non-compliance with Continuing Education Requirements**

Fee for non-compliance in a Cycle	\$ 750.00
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### **Financial Hardship**

The fees set out in this bylaw may be waived, reduced, or deferred in whole or in part by the Executive Director in accordance with the terms of the Association's Financial Hardship policy.

### **Administration Fees**

General Administration	\$ 61.00
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*Made by the Council of the Ontario Association of Architects on the 23 day of January 2025.*

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# Memorandum

**To:** Council

Settimo Vilardi	Loloa Alkasawat
J. William Birdsell	Donald Ardiel
Kimberly Fawcett-Smith	Jim Butticci
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Spiegel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 4.4

**From:** Kristiana Schuhmann, Vice President & PRC Chair

**Date:** January 6, 2025

**Subject:** Minor Updates to Practice Tip PT. 23.6 Design-Build: CCDC 14-2013 and PT. 23.7 Design-Build: CCDC 15-2013

**Objective:** To review and endorse minor updates to both Practice Tips to reflect recent issuance of revised PT. 25 Design-Build: Using OAA 600-2021

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## Background

The OAA's Practice Tips are accessed via the OAA website and, although written primarily for architects, they are also a resource for clients, lawyers, and other industry professionals. They are meant to be concise and follow a consistent structure and tone.

The launch of Practice Tip [PT.25 Design-Build: Using OAA 600 – 2021](#) (endorsed in 2024 and now available on the website) had identified the need to update related documents PT. 23.6 Design-Build: CCDC 14-2013 and PT. 23.7 Design-Build: CCDC 15-2013. Note that this is meant to be a minor maintenance exercise as updates to both CCDC 14 & 15 contracts are anticipated in the near future.

External legal counsel and the Practice Resource Committee (PRC) have reviewed the revised Practice Tips.

This memo contains a brief description of the updates, an overview of the process, and next steps related to the communication to members. Redlined versions are provided in the attachments.

## Key Changes to the Practice Tip PT. 23.6 (refer to Appendix 1 and 2)

CCDC 14 – 2013, Design-Build Stipulated Price Contract, is a standard contract form for design-build. CCDC 14 is a contract for design services and construction between an owner and a design-builder. This Practice Tip (PT) addresses issues and concerns of importance to certificate of practice holders involved in design-build projects using CCDC 14.

### Key technical and formatting changes include:

- General updates/formatting to the body of the Practice Tip
  - Minor editorial updates as required
  - Replacing use of the term “architect” with “certificate of practice holder”

- Summary Section
  - Updates references from the older version of CHOP to latest version
  - Update reference to PT 23.1 to 23.11 to coordinate with new CCDC 2-2020
- Background Section
  - Update OAA 600 contract version to 2021 from previous 2013 version
  - Updates to address prompt payment in the Construction Act
  - Update to address indemnity from sub-contractor's use of Instruments of Service
  - Considerations for the holder's role in payment certification
- Procedure Section
  - Address PLI concern about providing legal advice
  - Added reference to PT.25 to consider the concerns addressed in PT.25's suggested amendments for members to consider when using CCDC 14-2013
- References Section
  - Update References for CHOP
  - Update to newly released PT 25 Design-Build: Using 600-2021
  - Remove external hyperlink for ease of maintenance of the PT

**Key Changes to the Practice Tip PT. 23.7 (refer to Appendix 3 and 4)**

CCDC 15 – 2013, Design Services Contract between Design-Builder and Consultant, is a services contract which a design-builder would use to engage a certificate of practice holder. In lieu of using PT.25, Design-Build: Using OAA 600–2021, this Practice Tip provides guidance where CCDC 15 is used.

**Key technical and formatting change include:**

- General updates/formatting to the body of the Practice Tip
  - Minor editorial updates as required
  - Replacing use of the term “architect” with “certificate of practice holder”
- Summary Section
  - Update wording to reflect that CCDC 14-2013 has been available for some time now
  - Update references to the new version of PT.25
- Background Section
  - Update OAA 600 contract version to 2021 from previous 2013
  - Updates to address the definition of Construction Cost for consistency with OAA 600
  - Update to address indemnity from sub-contractor's use of Instruments of Service
  - Considerations for the holder's role in payment certification
- Procedure Section
  - Address PLI concern about providing legal advice
  - Added reference to PT.25 to consider the concerns addressed in PT.25's suggested amendments for members to consider when using CCDC 14-2013
- References Section
  - Update References for CHOP
  - Update to newly released PT 25 Design-Build: Using 600-2021

- Remove external hyperlink for ease of maintenance of the PT

## **Overview of the Process and Input from Various Parties**

The first draft was developed by starting with the current version of both PT.23.6 and 23.7, then making adjustments that parallel the updates to PT.25 Design-Build: Using OAA 600-2021 (endorsed by Council in September 2024).

Both PRC and external legal counsel provided review and input on the updates to the practice tips, addressing the impact of the changes between the OAA 600-2013 and 2021 contracts, replaced references to *Construction Lien Act* with *Construction Act*, managing a potential for a conflict of interest for the payment certifier, and the holder's role in certifying Substantial Performance. Staff then consolidated the minor maintenance items.

PRC provided review, in parallel with legal, and their comments were incorporated into the document, along with the completion of minor editorial changes.

## **Next Steps - Communication Plan, Withdraw Previous Version and Other Related Projects**

In tandem with the OAA's Communication team, staff from PAS are working on the following items to support the release of the new resource:

- Update to the Practice Knowledge Base Tool, including edits to other associated resources such as PT.00 Index to Practice Tips.
- Communications to Members: The updated Practice Tips will be posted on the website, featured in an upcoming issue of the OAA's Practice Advisory Newsletter as well as social media.
- Monitor the release of the next CCDC 14 and CCDC 15 version in the upcoming months.

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## **Action**

Council is asked to consider the following motion:

*It was moved by Schuhmann and seconded by .... That Council to endorse the revised OAA Practice Tip PT. 23.6 Design-Build: CCDC 14-2013 and PT. 23.7 Design-Build: CCDC 15-2013 as presented to Council on January 23.*

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## **Attachments**

- Appendix 1: REDLINE PT. 23.6 Design-Build: CCDC 14-2013 (version 3.1)
- Appendix 2: PT. 23.6 Design-Build: CCDC 14-2013 (version 3.2)
- Appendix 3: REDLINE PT.23.7 Design-Build: CCDC 15-2013 (version 1.1)
- Appendix 4: PT. 23.7 Design-Build: CCDC 15-2013 (version 1.2)

## Design-Build: CCDC 14 – 2013

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### Summary

In 2013, the Canadian Construction Documents Committee (CCDC) published new updated standard contract forms for design-build: CCDC 14 – 2013, Design-Build Stipulated Price Contract; and CCDC 15 – 2013, Design Services Contract between *Design-Builder* and *Consultant* which replaced the earlier (2000) versions of the Standard Construction Documents 14 & 15.

CCDC 14 is a contract for design services and construction between an owner and a design-builder. This Practice Tip (PT) addresses issues and concerns of importance to architects-certificate of practice holders (“holders”) involved in design-build projects using CCDC 14.

### Background

Design-build is a form of project delivery where an owner contracts, under a single contract, with one entity (a design-builder) to provide and take contractual responsibility for both the design services and the construction services.

Owners often use a Request for Proposal (RFP) process to solicit proposals from design-builders for both the design and construction for a fixed price. The design proposals are based on the owner’s functional program and statement of requirements which may be rudimentary or more detailed. An owner may select a contractor that they have had a successful relationship with and ask that they engage the architectholder and other consultants. They all work together until a design with an acceptable fixed price is settled.

In 2013, the CCDC released updated standard contract forms for design-build: CCDC 14 – 2013, Design-Build Stipulated Price Contract, and CCDC 15 – 2013, Design Services Contract between Design-Builder and Consultant. The previous 2000 versions of 14 & 15 were not endorsed by all of the CCDC constituent organizations; the 2013 versions now have the consensus agreement of all: the Canadian Construction Association (CCA), Construction Specifications Canada (CSC), Association of Consulting Engineering Companies – Canada (ACEC) and RAIC / ~~Architecture Canada~~.

The Ontario Association of Architects (OAA) established a review process of the CCDC 14 – 2013 version and the OAA Council endorsed its use subject to appropriate recommendations.

The OAA supports the concept of industry standard contracts as produced by the CCDC and endorsed by RAIC / ~~Architecture Canada~~, but continues to believe that services contracts for architects-OAA members should be under the purview of the architectural associations and ~~as such~~ recommends the use of OAA 600-2021 (Standard form of Contract) 2013 with July 1, 2018 Amendments, and OAA 600-2013 with Amendments to October 1, 2019 Standard Form of Contract for Architect’s Services (herein referred to collectively as ~~OAA 600~~) amended for use on design-build projects as described in PT.25, Design-Build: Using OAA 600-201321 with July 1, 2018 Amendments, and OAA 600-2013 with Amendments to October 1, 2019.

The supplementary conditions that the OAA recommends for CCDC 2 – ~~2008-2020~~ Stipulated Price Contract, as they may apply to similar clauses in CCDC 14, have not been included in this PT. Architects-OAA members can review PT.23.11 (CCDC 2-2020 - Stipulated Price Contract—Overview of the Changes in the 2020 Version and Recommended Supplementary Conditions) to determine which supplementary conditions may be applicable for their project or situation.

It is unusual for either [architectsholders](#) and/or clients to utilize CCDC contracts without any supplementary conditions. The publishing of these recommendations, suggested supplementary conditions and/or procedural cautions does not preclude the incorporation of additional items by clients and/or [architectsholders](#) in order to address specific project conditions.

This PT does not make an exhaustive analysis of the contract and the information provided is not a substitute for involvement of legal counsel. Clients should be advised to discuss specific wording and the inclusion of amendments and supplementary conditions with their own legal counsel.

This PT addresses issues and concerns of importance to [architectsholders](#) involved in design-build projects and how they may be affected by the use of a CCDC 14 contract between the owner and the design-builder.

## Issues

Areas of concern to [architectsholders](#) in CCDC 14 are described below with suggestions for supplementary conditions and/or management procedures. [Architects-Holders](#) may not be in a position to have the owner/design-builder contract amended if it is already in place or the [architect's-holder's](#) client (the design-builder) is reluctant to pursue changes with the owner. However, [architectsholders](#) should be aware of clauses giving rise to concern. If changes to the CCDC 14 cannot be made, [architectsholders](#) should be able to deal with the concerns successfully via the design-builder/[architectOAA Licensed Member](#) contract (refer to PT.25 & PT.23.7 Design-Build: CCDC 15 – 2013) or by management procedures during the course of the project.

CCDC contracts use the term “*Consultant*” to refer to either an architect or engineer. ~~and wW~~ here [it-the term](#) is used below in this Practice Tip, it refers to the [“Architect” holder of a certificate of practice](#).

## Copyright, CAD and BIM files and Use of Drawings

There are two concerns with respect to copyright and the use by others of a *Consultant's* drawings (prints, PDFs, CAD files or BIM files):

- the question of whether CAD or BIM files are to be provided or not and if so under what conditions,
- the rights of the *Consultant's Client* (or others) to “use” drawings being contingent upon payment of fees.

The concerns are described below along with suggested contract language for possible amendments.

## CAD and BIM

The definitions in OAA 600 clarify that the *Consultant's Instruments of Service, Electronic Documents* or computer-generated designs do not include editable CAD or BIM files. Neither CCDC 14 nor 15 make this distinction and thus a *Design-Builder* and/or *Owner* may assume that CAD files will be provided when in fact the intent of the *Consultant* may be only to provide prints or non-editable electronic (PDF) files of drawings.

The [OAA 600 \(in particular Appendix A Provision of Editable CAD or BIM Files\)](#), [RAIC Practice Builder 19, The Exchange and Transfer of Electronic Documents](#) and [RAIC the Canadian Handbook of Practice \(CHOP\) Chapter 6.42-3.7 – Appendix A – Digital Copyright and Architects](#), are [excellent](#) references for information regarding electronic files, CAD, BIM, etc. with disclaimers and authorization language for the use of CAD or BIM files by trades in preparing shop drawings or the *Owner* for facility management.

## Use and Payment

A particular concern in CCDC 14 is GC 7.2.5.1 which states that if the *Owner* suspends or terminates the *Contract* with the *Design-Builder*, the *Owner* has the right to use the *Consultant's* drawings to complete the design or the construction. The clause also says that the *Consultants* takes no responsibility for the use of such documents, but there is no qualification that the *Consultant's* copyright must be respected and that the *Owner* may not use the drawings if the *Consultant* services have not been fully paid. The CCDC 15 contract has this requirement (GC 1.2.4) but CCDC 14 does not.

GC 7.2.5 goes on further to state that the *Owner*, subject to the rights of third parties, may “finish the *Design Services* and *Work* by whatever method the *Owner* may consider expedient” and withhold further payment

until issues are settled. The financial determinations are made by the *Payment Certifier* with a timeframe for settlement that can extend to the end of the warranty period.

Such situations are a risk the *Consultant* takes on. Suggestions to manage the risk include actions to:

- modify the *Owner/Design-Builder* contract to clearly state that the use of drawings is contingent on payment of fees (see GC 1.1.11 below);
- modify the *Design-Builder/Consultant* contract for payment in the shortest reasonable period ~~— the Construction Act requires mandates payment by a contractor to a subcontractor within 287 days of the contractor's receipt of Proper Invoice payment from the owner. In its subcontract with the Design-Builder, however, the Consultant may contract for timely payment that is not dependent upon the Design-Builder's receipt of payment from the Owner (e.g., for payment within no later than 45 days or 90 days of receipt of the Consultant's invoice), OAA-600 uses 45 days whereas a shorter time may be prudent and CCDC-15 has 90 days. As legislation is subject to amendment, any such time frames payment terms should be reviewed and brought into compliance with any applicable current prompt payment legislation;~~
- invoice promptly and if payment is outstanding beyond the deadline, advise, after reviewing the Design-Builder/Consultant contract and consulting legal counsel, that services will be suspended and no drawings ~~instruments of service Construction Documents, or other designs Drawings or Specifications~~ will be forwarded until payment is received;
- to the extent possible, obtain appropriate licensing agreements from ~~the client, the Owner, the Design-Builder, Other Consultants, and Subcontractors~~, before providing CAD or BIM files. It may be challenging for the *Consultant* to obtain such licensing agreements, particularly where the *Owner/Design-Builder* contract has already been executed or otherwise from *Other Consultants* and *Subcontractors* with whom the *Consultant* does not have a direct relationship. For this reason, whenever possible it is recommended that, before the *Owner/Design-Builder* contract is executed and/or before providing (or contractually agreeing to provide) CAD or BIM files to the *Design-Builder*, the *Consultant* obtain licensing agreements from the *Owner* and *Design-Builder* which extend to the *Other Consultants*, *Subcontractors* and other third parties with whom they have a direct relationship;
- control the distribution of drawings Drawings, especially CAD files, if payment of invoices is outstanding beyond the defined maximum period of time for payment.

## Use by Others

~~Incorporation of the~~ The following text revisions to the CCDC 14 – 2013 through for supplementary conditions is advantageous in may better protecting the *Consultant* with regard to the use of the Instruments of Service Drawings and Specifications.

- Change the last sentence of GC 1.1.7 to read “Their alteration by the *Owner* or any other person is prohibited”.
- Change the 3rd line of GC 1.1.10 to read, “the *Owner* shall indemnify the *Design-Builder*, the *Consultant*, and *Other Consultants* against claims and costs (including legal costs) associated with such improper alteration or use.”
- Add new GC 1.1.11:
  - 1.1.11 As a condition precedent to ~~the~~ use of ~~the~~ the *Consultant's* instruments of service, including Construction Documents prepared by the Consultant and the designs, Drawings or Specifications in the Construction Documents therein, all corresponding ~~related~~ fees, reimbursable expenses and ~~value Value added Added taxes Taxes~~ of the *Consultant* ~~or Other Consultants~~ are required to be paid in full.”

## Design Services – Role of the Consultant

The previous CCDC 14 – 2000 contract included a summary of the *Consultant's* services. The 2013 version says (GC 3.1.4) that the *Design-Builder's Contract* with the *Consultant* shall be based on CCDC 15 or with terms and conditions consistent with it.

The OAA recommends that architectsholders utilize OAA 600—~~2013-2021~~ *Standard Form of Contract for Architect's Services* modified for use on design-build projects per PT.25 or, if that is not possible, CCDC 15 with amended terms and conditions described in PT.23.7.

GC 3.1 CONTROL OF THE DESIGN SERVICES AND THE WORK, states that the *Design-Builder* shall have total control and sole responsibility for the *Design Services*; however this is not intended to reduce the *Consultant's* professional responsibilities. The *Consultant* is required to act in accordance with the performance standards in Regulation 27 under the Architects Act and, the requirements of applicable law (including the Building Code), and of authorities having jurisdiction.

GC 3.11 NON-CONFORMING DESIGN AND DEFECTIVE WORK, in 3.11.2 states that the *Design-Builder* is required to correct defective work rejected by *Owner*. This does not preclude correcting defective work reported by the *Consultant* and *Other Consultants* in carrying out general review and contract administration whether or not the *Owner* identifies the defective item deficiency or not. Though it is not stated clearly in CCDC 14, the *Consultant's* responsibility for identifying defective work and work not compliant with building codes is clear in both CCDC 15-2013 and OAA 600.

GC 3.11.4 allows the *Owner* to deduct from the *Contract*, value of defective work or work not completed if it is not expedient to correct. In the situation where a *Consultant* believes that the deletion of work or failure to correct is a serious concern they need to advise the *Design-Builder* and the *Owner*. If the deletion or defect is contrary to applicable law or is a building code related matter, *Consultants* should take the necessary action to make the *Design-Builder* and building department aware that such deletion or defect is not acceptable and constitutes a deficiency which will be recorded in site visit reports and in-prior to final report or sign-off letters.

### **Owner's Advisor**

In design-build project delivery, some *Owners* engage another *Consultant* or non-professional as an *Owner's Advisor*, also called "advocate consultant." The *Owner's Advisor* where one has been designated is a separate entity from the *Consultant*. Currently there are no standard contracts or guides describing this role. CCDC 14 states (GC 2.3.1 & .2) that the role shall be described in the *Contract Documents* so that all parties have a clear understanding. It is essential that the separation of professional duties of the *Consultant*, and the responsibilities of the *Payment Certifier*, and the *Owner's Advisor* are clearly defined in writing.

### **Interpretation but no Finding**

GC 2.2.3 states that "The *Owner* will be, in the first instance, the interpreter of the requirements of the *Owner's Statement of Requirements*." The *Owner* is directly or indirectly, the author of these requirements and it is appropriate that they interpret them, just as the *Consultant* is the interpreter of the *Construction Documents* which they author (GC 3.3.1). In situations where the *Design-Builder* does not agree with the *Owner's* interpretation it becomes a dispute to be negotiated or dealt with under GC 8 DISPUTE RESOLUTION without input from the *Consultant*.

GC 3.3.1 states that the *Consultant* and *Other Consultants* are "in the first instance the interpreter of the requirements of the *Construction Documents* that they have prepared." In other CCDC and OAA contracts, the making of a "finding" is included along with the *Consultant's* interpretation. If that finding is not accepted by either party (*Owner* or ~~*Contractor*~~*Design-Builder*) a dispute is initiated. In the CCDC 14 there is no role for the *Consultant* to make a finding in order to initiate the dispute resolution process. It is important for the *Consultant* to understand the limitation placed on their role in situations under dispute.

### **Payment Certifier and Substantial Performance**

The CCDC 14 – 2013 provides the option of a separate *Payment Certifier* other than the *Consultant*. The term *Payment Certifier* is defined, the entity designated to be the *Payment Certifier* is named in Article A-1.2 and the role described separately (GC 2.4). The *Owner* is responsible for designating the *Payment Certifier* (GC 2.4.1). It could be the *Consultant* or a separate entity.

Some believe that it is not appropriate for the *Consultant* to certify to the *Owner* the *Design-Builder's* progress payments as the *Consultant* is under contract to the *Design-Builder* and therefore the *Consultant* would be certifying payment of their own fees. This may be perceived to create a conflict of interest.; oOthers believe



that it is no more or less of a conflict of interest than when the *Consultant* is engaged by the *Owner* and does payment certification in a traditional design-bid-build scenario.

One thing that is different in a design-build situation is that the *Payment Certifier* is required to certify the *Contract Price which includes the Work* and also the *Design Services* (GC 2.4.1). An *Owner* with previous experience and confidence in a *Consultant* and a *Design-Builder* may not have a problem with this scenario; however, a *Consultant* certifying their own fees would be perceived as having a conflict of interest (refer to the *Architects Act, Regulation 27 regarding conflicts of interest*). At a minimum, a *Consultant* carrying out payment certification must declare the conflict of interest to the *Owner*, or any other party that may be relying upon the certificates for payment, ~~or a~~ Alternatively, a *Consultant could* certify the *Work* but not the *Design Services*.

Since the definition of *Work* excludes *Design Services*, any *Construction Cost* progress reports or certificates for payment should only relate to *Work* and not include costs of *Design Services*. If a *Consultant* is only certifying the value of *Work* and not fees for their own *Design Services*, the conflict of interest issue would be eliminated reduced to what is accepted in a typical design-bid-build scenario.

Substantial performance is more difficult. In Ontario, both the *Construction Act* (CA) and ~~f~~Form 9, *Certificate of Substantial Performance of the Contract*, and the *Construction Lien Act* (CLA) and ~~form 6, Certificate of Substantial Performance~~, refer to Substantial Performance of the **Contract**, not of the *Work*. Although there can be variations there appear to be three possible scenarios:

- (A) Where the *Consultant* is not acting as the *Payment Certifier*, and is not doing any cost reports or involved with *Substantial Performance of the Work*, there should be no issues. Either the designated *Payment Certifier* or the *Owner* and *Design-Builder* jointly will issue the CA ~~f~~Form 9 ~~or CLA form 6 as appropriate~~ for Substantial Performance of the Contract.
- (B) Where the *Consultant* is not the designated *Payment Certifier*, but is providing cost reports to the *Design-Builder*, care should be taken to avoid wording in the reports ~~sing~~ that would be perceived as a 'certification' or otherwise be interpreted that the *Consultant* is the designated *Payment Certifier*.
- (C) If the *Consultant* is designated in CCDC 14 as the *Payment Certifier*, they should:
  - clarify if certification is intended to include the *Consultant's* own fees; if so, then inform all parties in writing of the conflict of interest;
  - also clarify with the *Owner* and the *Design-Builder* who will certify Substantial Performance of the Contract (CA ~~f~~Form 9 ~~or CLA form 6~~); and
  - have the *Design-Builder* separate *Work* and *Design Services* in the schedule of values and progress payment invoices so that documentation can refer to each portion and its approval separately.

It is recommended that the following clauses incorporated into CCDC 14 will provide clarification for the *Owner*, *Design-Builder* and the *Consultant* in regards to certification and *Substantial Performance of the Work*. The *Design-Builder* and the *Owner* are advised to consult their own legal advisors.

The *Parties* agree that where the *Contract Price* includes both the cost of the *Work* and the cost of *Design Services* under the *Contract* (refer to PT.25 for a sample supplementary conditions template):

- (1) the payment certification by the *Consultant* made in support of the *Design-Builder's* application for payment is in respect of the value of construction performed and *Products* delivered only. The *Consultant* cannot independently certify the value of the *Design Services* provided by the *Consultant* to the *Design-Builder*; and
- (2) the *Consultant* is not deemed to be the "the Payment Certifier" under s.32(1) of the Ontario *Construction Act* or *Construction Lien Act*, for purposes of certifying the date of Substantial Performance of *the Contract* under s.2 of either Act. The *Consultant* can only assist the *Design-Builder* for the purpose of determining the date on which the *Contract* was substantially performed. In these circumstances, the *Owner* and the *Design-Builder* shall make the determination of substantial performance jointly and both shall sign the certificate (CA form 9 or CLA form 6 as appropriate).

## Suggested Procedure

- Become familiar with the design-build form of project delivery. Review referenced material including standard CCDC contracts and CCDC guides, the *RAIC Canadian Handbook of Practice (CHOP)* and OAA Practice Tips.
- If becoming involved in a design-build project or presented with CCDC 14 or CCDC 15 contracts by an *Owner* or *Design-Builder*, review and discuss the benefits of the OAA recommendations in PTs 25, 23.6 and 23.7.
- To clients asking about design-build, provide information, sources for additional information, possible pros and cons from personal experiences, remembering that the determination of the project delivery method is an *owner's* decision. Advising and making strong recommendations may be seen as making a decision or providing legal advice, and may give rise to liability for the architectholder.
- It is very important to obtain a copy of the eOwner/dDesign-bBuilder contract. Review and coordinate the 'Role of the Consultant' in that contract with the architectholder's services described in the design-builder/Certificate of Practice hHOAA Licensed Memberarchitect contract. Any inconsistencies should be discussed and then clarified in writing.
- If there will be an *Owner's Advisor* designated in CCDC 14 obtain a copy of the written description of the role, responsibilities and services.
- Confirm who will be the *Payment Certifier* designated in CCDC 14 and clarify the roles and responsibilities. Refer to comments in PT.25.
- Clarify that the definition of *Supplemental Instruction* in CCDC 14 pertains to an instruction used by the *Owner* to the *Design-Builder* so as not to be confused with supplemental instructions issued by the *Consultant* or *Other Consultants*.
- Discuss any questions regarding insurance with your insurance provider.

## References

PT.25 – *Design-Build*: Using OAA 600 - 20212013

PT.23.7 - *Design-Build*: CCDC 15 – 2013

CCDC websiteCCDC website – contracts and guides.

PT.23.11 - CCDC 2-2020 - Stipulated Price Contract—Overview of the Changes in the 2020 Version and Recommended Supplementary Conditions

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*The OAA does not provide legal, insurance or accounting advice. Readers are advised to consult their own legal, accounting or insurance representatives to obtain suitable professional advice in those regards.*

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## Design–Build: CCDC 14 – 2013

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### Summary

In 2013, the Canadian Construction Documents Committee (CCDC) published updated standard contract forms for design-build: CCDC 14 – 2013, Design-Build Stipulated Price Contract; and CCDC 15 – 2013, Design Services Contract between *Design-Builder* and *Consultant* which replaced the earlier (2000) versions of the Standard Construction Documents 14 & 15.

CCDC 14 is a contract for design services and construction between an owner and a design-builder. This Practice Tip (PT) addresses issues and concerns of importance to certificate of practice holders (“holders”) involved in design-build projects using CCDC 14.

### Background

Design-build is a form of project delivery where an owner contracts, under a single contract, with one entity (a design-builder) to provide and take contractual responsibility for both the design services and the construction services.

Owners often use a Request for Proposal (RFP) process to solicit proposals from design-builders for both the design and construction for a fixed price. The design proposals are based on the owner’s functional program and statement of requirements which may be rudimentary or more detailed. An owner may select a contractor that they have had a successful relationship with and ask that they engage the holder and other consultants. They all work together until a design with an acceptable fixed price is settled.

In 2013, the CCDC released updated standard contract forms for design-build: CCDC 14 – 2013, Design-Build Stipulated Price Contract, and CCDC 15 – 2013, Design Services Contract between Design-Builder and Consultant. The previous 2000 versions of 14 & 15 were not endorsed by all of the CCDC constituent organizations; the 2013 versions now have the consensus agreement of all: the Canadian Construction Association (CCA), Construction Specifications Canada (CSC), Association of Consulting Engineering Companies – Canada (ACEC) and RAIC.

The Ontario Association of Architects (OAA) established a review process of the CCDC 14 – 2013 version and the OAA Council endorsed its use subject to appropriate recommendations.

The OAA supports the concept of industry standard contracts as produced by the CCDC and endorsed by RAIC, but continues to believe that services contracts for OAA members should be under the purview of the architectural association and recommends the use of OAA 600-2021 (Standard form of Contract) amended for use on design-build projects as described in PT.25, Design-Build: Using OAA 600-2021.

The supplementary conditions that the OAA recommends for CCDC 2 –2020 Stipulated Price Contract, as they may apply to similar clauses in CCDC 14, have not been included in this PT. OAA members can review PT.23.11 (CCDC 2-2020 - Stipulated Price Contract—Overview of the Changes in the 2020 Version and Recommended Supplementary Conditions) to determine which supplementary conditions may be applicable for their project or situation.

It is unusual for either holders and/or clients to utilize CCDC contracts without any supplementary conditions. The publishing of these recommendations, suggested supplementary conditions and/or procedural cautions does not preclude the incorporation of additional items by clients and/or holders in order to address specific project conditions.

This PT does not make an exhaustive analysis of the contract and the information provided is not a substitute for involvement of legal counsel. Clients should be advised to discuss specific wording and the inclusion of amendments and supplementary conditions with their own legal counsel.

This PT addresses issues and concerns of importance to holders involved in design-build projects and how they may be affected by the use of a CCDC 14 contract between the owner and the design-builder.

## Issues

Areas of concern to holders in CCDC 14 are described below with suggestions for supplementary conditions and/or management procedures. Holders may not be in a position to have the owner/design-builder contract amended if it is already in place or the holder's client (the design-builder) is reluctant to pursue changes with the owner. However, holders should be aware of clauses giving rise to concern. If changes to the CCDC 14 cannot be made, holders should be able to deal with the concerns successfully via the design-builder/OAA Licensed Member contract (refer to PT.25 & PT.23.7 Design-Build: CCDC 15 – 2013) or by management procedures during the course of the project.

CCDC contracts use the term "*Consultant*" to refer to either an architect or engineer. Where the term is used below in this Practice Tip, it refers to the holder of a certificate of practice.

## Copyright, CAD and BIM files and Use of Drawings

There are two concerns with respect to copyright and the use by others of a *Consultant's* drawings (prints, PDFs, CAD files or BIM files):

- the question of whether CAD or BIM files are to be provided or not and if so under what conditions,
- the rights of the *Consultant's Client* (or others) to "use" drawings being contingent upon payment of fees.

The concerns are described below along with suggested contract language for possible amendments.

## CAD and BIM

The definitions in OAA 600 clarify that the *Consultant's Instruments of Service, Electronic Documents* or computer-generated designs do not include editable CAD or BIM files. Neither CCDC 14 nor 15 make this distinction and thus a *Design-Builder* and/or *Owner* may assume that CAD files will be provided when in fact the intent of the *Consultant* may be only to provide prints or non-editable electronic (PDF) files of drawings.

The OAA 600 (in particular Appendix A Provision of Editable CAD or BIM Files) and the Canadian Handbook of Practice (CHOP) Chapter 6.4 Appendix A – Copyright and Architects, are references for information regarding electronic files, CAD, BIM, etc. with disclaimers and authorization language for the use of CAD or BIM files by trades in preparing shop drawings or the *Owner* for facility management.

## Use and Payment

A particular concern in CCDC 14 is GC 7.2.5.1 which states that if the *Owner* suspends or terminates the *Contract* with the *Design-Builder*, the *Owner* has the right to use the *Consultant's* drawings to complete the design or the construction. The clause also says that the *Consultant* takes no responsibility for the use of such documents, but there is no qualification that the *Consultant's* copyright must be respected and that the *Owner* may not use the drawings if the *Consultant* services have not been fully paid. The CCDC 15 contract has this requirement (GC 1.2.4) but CCDC 14 does not.

GC 7.2.5 goes on further to state that the *Owner*, subject to the rights of third parties, may "finish the *Design Services* and *Work* by whatever method the *Owner* may consider expedient" and withhold further payment until issues are settled. The financial determinations are made by the *Payment Certifier* with a timeframe for settlement that can extend to the end of the warranty period.

Such situations are a risk the *Consultant* takes on. Suggestions to manage the risk include actions to:

- modify the *Owner/Design-Builder* contract to clearly state that the use of drawings is contingent on payment of fees (see GC 1.1.11 below);

- modify the *Design-Builder/Consultant* contract for payment in the shortest reasonable period – the Construction Act mandates payment by a contractor to a subcontractor within 7 days of the contractor's receipt of payment from the owner. In its subcontract with the *Design-Builder*, however, the *Consultant* may contract for timely payment that is not dependent upon the *Design-Builder's* receipt of payment from the *Owner* (e.g., for payment within no later than 45 days or 90 days of receipt of the *Consultant's* invoice), As legislation is subject to amendment, any such payment terms should be reviewed and brought into compliance with current prompt payment legislation;
- invoice promptly and if payment is outstanding beyond the deadline, advise, after reviewing the *Design-Builder/Consultant* contract and consulting legal counsel, that services will be suspended and no drawings *Construction Documents* or other *Drawings* or *Specifications* will be forwarded until payment is received;
- to the extent possible, obtain appropriate licensing agreements from the *Owner*, the *Design-Builder*, *Other Consultants* and *Subcontractors*, before providing CAD or BIM files. It may be challenging for the *Consultant* to obtain such licensing agreements, particularly where the *Owner/Design-Builder* contract has already been executed or otherwise from *Other Consultants* and *Subcontractors* with whom the *Consultant* does not have a direct relationship. For this reason, whenever possible it is recommended that, before the *Owner/Design-Builder* contract is executed and/or before providing (or contractually agreeing to provide) CAD or BIM files to the *Design-Builder*, the *Consultant* obtain licensing agreements from the *Owner* and *Design-Builder* which extend to the *Other Consultants*, *Subcontractors* and other third parties with whom they have a direct relationship;
- control the distribution of *Drawings*, especially CAD files, if payment of invoices is outstanding beyond the defined maximum period of time for payment.

### Use by Others

The following revisions to the CCDC 14 – 2013 through supplementary conditions may better protect the *Consultant* with regard to the use of the *Drawings* and *Specifications*.

- Change the last sentence of GC 1.1.7 to read “Their alteration by the *Owner* or any other person is prohibited”.
- Change the 3rd line of GC 1.1.10 to read, “the *Owner* shall indemnify the *Design-Builder*, the *Consultant*, and *Other Consultants* against claims and costs (including legal costs) associated with such improper alteration or use.”
- Add new GC 1.1.11:
  - 1.1.11 As a condition precedent to use of the *Consultant's* instruments of service, including *Construction Documents* prepared by the *Consultant* and the designs, *Drawings* or *Specifications* therein, all corresponding fees, reimbursable expenses and *Value Added Taxes* of the *Consultant* are required to be paid in full.”

### Design Services – Role of the Consultant

The previous CCDC 14 – 2000 contract included a summary of the *Consultant's* services. The 2013 version says (GC 3.1.4) that the *Design-Builder's Contract* with the *Consultant* shall be based on CCDC 15 or with terms and conditions consistent with it.

The OAA recommends that holders utilize OAA 600-2021 *Standard Form of Contract* modified for use on design-build projects per PT.25 or, if that is not possible, CCDC 15 with amended terms and conditions described in PT.23.7.

GC 3.1 CONTROL OF THE DESIGN SERVICES AND THE WORK, states that the *Design-Builder* shall have total control and sole responsibility for the *Design Services*; however this is not intended to reduce the *Consultant's* professional responsibilities. The *Consultant* is required to act in accordance with the performance standards in Regulation 27 under the Architects Act, the requirements of applicable law (including the Building Code), and of authorities having jurisdiction.

GC 3.11 NON-CONFORMING DESIGN AND DEFECTIVE WORK, in 3.11.2 states that the *Design-Builder* is required to correct defective work rejected by *Owner*. This does not preclude correcting defective work reported by the *Consultant* and *Other Consultants* in carrying out general review and contract administration whether or not the *Owner* identifies the deficiency or not. Though it is not stated clearly in CCDC 14, the *Consultant's* responsibility for identifying defective work and work not compliant with building codes is clear in both CCDC 15-2013 and OAA 600.

GC 3.11.4 allows the *Owner* to deduct from the *Contract*, value of defective work or work not completed if it is not expedient to correct. In the situation where a *Consultant* believes that the deletion of work or failure to correct is a serious concern they need to advise the *Design-Builder* and the *Owner*. If the deletion or defect is contrary to applicable law or is a building code related matter, *Consultants* should take the necessary action to make the *Design-Builder* and building department aware that such deletion or defect is not acceptable and constitutes a deficiency which will be recorded in site visit reports and prior to final report or sign-off letters.

### **Owner's Advisor**

In design-build project delivery, some *Owners* engage another *Consultant* or non-professional as an *Owner's Advisor*, also called "advocate consultant." The *Owner's Advisor* where one has been designated is a separate entity from the *Consultant*. Currently there are no standard contracts or guides describing this role. CCDC 14 states (GC 2.3.1 & .2) that the role shall be described in the *Contract Documents* so that all parties have a clear understanding. It is essential that the separation of professional duties of the *Consultant*, and the responsibilities of the *Payment Certifier*, and the *Owner's Advisor* are clearly defined in writing.

### **Interpretation but no Finding**

GC 2.2.3 states that "The *Owner* will be, in the first instance, the interpreter of the requirements of the *Owner's Statement of Requirements*." The *Owner* is directly or indirectly, the author of these requirements and it is appropriate that they interpret them, just as the *Consultant* is the interpreter of the *Construction Documents* which they author (GC 3.3.1). In situations where the *Design-Builder* does not agree with the *Owner's* interpretation it becomes a dispute to be negotiated or dealt with under GC 8 DISPUTE RESOLUTION without input from the *Consultant*.

GC 3.3.1 states that the *Consultant* and *Other Consultants* are "in the first instance the interpreter of the requirements of the *Construction Documents* that they have prepared." In other CCDC and OAA contracts, the making of a "finding" is included along with the *Consultant's* interpretation. If that finding is not accepted by either party (*Owner* or *Design-Builder*) a dispute is initiated. In the CCDC 14 there is no role for the *Consultant* to make a finding in order to initiate the dispute resolution process. It is important for the *Consultant* to understand the limitation placed on their role in situations under dispute.

### **Payment Certifier and Substantial Performance**

The CCDC 14 – 2013 provides the option of a separate *Payment Certifier* other than the *Consultant*. The term *Payment Certifier* is defined, the entity designated to be the *Payment Certifier* is named in Article A-1.2 and the role described separately (GC 2.4). The *Owner* is responsible for designating the *Payment Certifier* (GC 2.4.1). It could be the *Consultant* or a separate entity.

Some believe that it is not appropriate for the *Consultant* to certify to the *Owner* the *Design-Builder's* progress payments as the *Consultant* is under contract to the *Design-Builder* and therefore the *Consultant* would be certifying payment of their own fees. This may be perceived to create a conflict of interest. Others believe that it is no more or less of a conflict of interest than when the *Consultant* is engaged by the *Owner* and does payment certification in a traditional design-bid-build scenario.

One thing that is different in a design-build situation is that the *Payment Certifier* is required to certify the *Contract Price which includes the Work* and also the *Design Services* (GC 2.4.1). An *Owner* with previous experience and confidence in a *Consultant* and a *Design-Builder* may not have a problem with this scenario; however, a *Consultant* certifying their own fees would be perceived as having a conflict of interest (refer to the *Architects Act*, Regulation 27 regarding conflicts of interest). At a minimum, a *Consultant* carrying out payment certification must declare the conflict of interest to the *Owner*, or any other party that may be relying

upon the certificates for payment. Alternatively, a *Consultant* could certify the *Work* but not the *Design Services*.

Since the definition of *Work* excludes *Design Services*, any *Construction Cost* progress reports or certificates for payment should only relate to *Work* and not include costs of *Design Services*. If a *Consultant* is only certifying the value of *Work* and not fees for their own *Design Services*, the conflict of interest issue would be reduced to what is accepted in a typical design-bid-build scenario.

Substantial performance is more difficult. In Ontario, both the *Construction Act* (CA) and Form 9, *Certificate of Substantial Performance* of the *Contract*, refer to Substantial Performance of the **Contract**, not of the *Work*. Although there can be variations there appear to be three possible scenarios:

- (A) Where the *Consultant* is not acting as the *Payment Certifier*, and is not doing any cost reports or involved with *Substantial Performance of the Work*, there should be no issues. Either the designated *Payment Certifier* or the *Owner* and *Design-Builder* jointly will issue the CA Form 9 for Substantial Performance of the *Contract*.
- (B) Where the *Consultant* is not the designated *Payment Certifier*, but is providing cost reports to the *Design-Builder*, care should be taken to avoid wording in the reports that would be perceived as a 'certification' or otherwise be interpreted that the *Consultant* is the designated *Payment Certifier*.
- (C) If the *Consultant* is designated in CCDC 14 as the *Payment Certifier*, they should:
  - clarify if certification is intended to include the *Consultant's* own fees; if so, then inform all parties in writing of the conflict of interest;
  - also clarify with the *Owner* and the *Design-Builder* who will certify Substantial Performance of the *Contract* (CA Form 9); and
  - have the *Design-Builder* separate *Work* and *Design Services* in the schedule of values and progress payment invoices so that documentation can refer to each portion and its approval separately.

It is recommended that the following clauses incorporated into CCDC 14 will provide clarification for the *Owner*, *Design-Builder* and the *Consultant* in regards to certification and *Substantial Performance of the Work*. The *Design-Builder* and the *Owner* are advised to consult their own legal advisors.

The *Parties* agree that where the *Contract Price* includes both the cost of the *Work* and the cost of *Design Services* under the *Contract* (refer to PT.25 for a sample supplementary conditions template):

- (1) the payment certification by the *Consultant* made in support of the *Design-Builder's* application for payment is in respect of the value of construction performed and *Products* delivered only. The *Consultant* cannot independently certify the value of the *Design Services* provided by the *Consultant* to the *Design-Builder*; and
- (2) the *Consultant* is not deemed to be the "the Payment Certifier" under s.32(1) of the Ontario *Construction Act* or *Construction Lien Act*, for purposes of certifying the date of Substantial Performance of the *Contract* under s.2 of either Act. The *Consultant* can only assist the *Design-Builder* for the purpose of determining the date on which the *Contract* was substantially performed. In these circumstances, the *Owner* and the *Design-Builder* shall make the determination of substantial performance jointly and both shall sign the certificate (CA form 9 or CLA form 6 as appropriate).

## Suggested Procedure

- Become familiar with the design-build form of project delivery. Review referenced material including standard CCDC contracts and CCDC guides, the *RAIC Canadian Handbook of Practice* (CHOP) and OAA Practice Tips.
- If becoming involved in a design-build project or presented with CCDC 14 or CCDC 15 contracts by an *Owner* or *Design-Builder*, review and discuss the benefits of the OAA recommendations in PTs 25, 23.6 and 23.7.

- To clients asking about design-build, provide information, sources for additional information, possible pros and cons from personal experiences, remembering that the determination of the project delivery method is an *owner's* decision. Advising and making strong recommendations may be seen as making a decision or providing legal advice, and may give rise to liability for the holder.
- It is very important to obtain a copy of the *Owner/Design-Builder* contract. Review and coordinate the 'Role of the Consultant' in that contract with the holder's services described in the design-builder/OAA Licensed Member contract. Any inconsistencies should be discussed and then clarified in writing.
- If there will be an *Owner's Advisor* designated in CCDC 14 obtain a copy of the written description of the role, responsibilities and services.
- Confirm who will be the *Payment Certifier* designated in CCDC 14 and clarify the roles and responsibilities. Refer to comments in PT.25.
- Clarify that the definition of *Supplemental Instruction* in CCDC 14 pertains to an instruction used by the *Owner* to the *Design-Builder* so as not to be confused with supplemental instructions issued by the *Consultant* or *Other Consultants*.
- Discuss any questions regarding insurance with your insurance provider.

## References

PT.25 – *Design-Build*: Using OAA 600 - 2021

PT.23.7 - *Design-Build*: CCDC 15 – 2013

CCDC website – contracts and guides.

PT.23.11 - CCDC 2-2020 - Stipulated Price Contract—Overview of the Changes in the 2020 Version and Recommended Supplementary Conditions

RAIC CHOP Chapter 4.1 Types of Design Construction Program Delivery

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## Design-Build: CCDC 15 - 2013

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### Summary

In 2013, the Canadian Construction Documents Committee (CCDC) has published updated new standard contract forms for design-build: CCDC 14 – 2013, *Design-Build Stipulated Price Contract* and CCDC 15 – 2013, *Design Services Contract between Design-Builder and Consultant* which replaced the earlier (2000) versions of Standard Construction Documents 14 & 15.

CCDC 15 is a services contract which a design-builder would use to engage an architect certificate of practice holder (“holder”). The Ontario Association of Architects (OAA) recommends the use of OAA 600–202143 amended for use on design-build projects in lieu of using CCDC 15 (refer to PT.25, Design-Build: [Using OAA 600–202143](#)); however this Practice Tip provides guidance where CCDC 15 is used.

As the architect’s holder’s contract for services is used in conjunction with the design-builder’s contract with the owner (CCDC 14), it is important to also review the Practice Tip PT.23.6, *Design-Build: CCDC 14 – 2013*.

### Background

Design-build is a form of project delivery where an owner contracts, under a single contract, with one entity (the design-builder) to provide and take contractual responsibility for both the design services and the construction.

In 2013, CCDC released new standard contract forms for design-build: CCDC 14 – 2013, *Design-Build Stipulated Price Contract*, and CCDC 15 – 2013, *Design Services Contract between Design-Builder and Consultant*. The previous 2000 versions of 14 & 15 were not endorsed by all of the CCDC constituent organizations; the 2013 version now has the consensus agreement of all: Canadian Construction Association (CCA), Construction Specifications Canada (CSC), Association of Consulting Engineering Companies Canada (ACEC) and RAIC / Architecture Canada.

The OAA supports the concept of industry standard contracts as produced by the CCDC and endorsed by RAIC / Architecture Canada but continues to believe that services contracts for architects OAA members should be under the purview of architectural associations and as such recommends the use of OAA 600–201321 (Standard Form of Contract) for Architect’s Services amended for use on design-build projects in lieu of using CCDC 15 – 2013 (refer to PT.25 Design Build: [Using OAA 600-201321](#)). However, this PT has been prepared to provide guidance under situations where the use of OAA 600 is not possible and CCDC 15 is to be used.

This Practice Tip does not make an exhaustive analysis of the contract and the information provided is not a substitute for involvement of legal counsel.

### Issues

Issues of importance to architectsholders involved in design-build projects using CCDC 15 – 2013 are described below with suggestions for management procedures and in some cases suggested wording for supplementary conditions.

CCDC contracts use the term “Consultant” to refer to either an architect or engineer, and where the term is used below in this Practice Tip, it refers to the “Architect” holder of a certificate of practice.

## Consultant's Subconsultants

### Article A-1 – DESIGN SERVICES

A-1.2 ~~delete~~ the words “but not limited to” in the 1<sup>st</sup> line or otherwise qualify that the retention of any *Subconsultant* other than those listed is an additional service to the contract subject to an agreed adjustment to the fee.

## Remuneration & Payment

### Article A-5 REMUNERATION FOR DESIGN SERVICES

A-5.2 CCDC contracts do not include VAT or contingencies in the definition of *Construction Price* or *Construction Cost*. For the purposes of determining an appropriate fee, the OAA 600 and the RAIC Fee Guide ~~do include these. If using a percentage fee Consultants should note that a fee of \_x\_% of the Construction Cost that excludes 13% VAT would be increased by 1.13 times the \_x\_% to account for this variance~~ have been revised and are now consistent with ~~this~~ the approach taken by CCDC.

A-5.3 Refer to comments below on SCHEDULE A - Post Construction Phase.

A-5.7 Recommend ~~deleting~~ clause A-5.7 and replacing it with ~~the~~ similar wording to clause ~~10.611.9~~ of OAA 600–20~~2143~~ .

~~10.65.7~~ Termination expenses are in addition to compensation for the *Consultant's Design Services services* and include:

1) ~~1)~~ expenses directly attributable to termination for which the *Consultant* is not otherwise compensated;

~~1)2)~~ plus an amount for the *Consultant's* anticipated profit calculated as 10% of the value of the *Design Services services* remaining to be performed by the *Consultant*; or

~~2)3)~~ such other amount as may be mutually agreed.

Alternatively insert in A-5.7 the standard value given in OAA 600–20~~2143~~, e.g. “10% of the value of services remaining”.

### GC 4.1 PAYMENTS

4.1.3 Recommend changing 90 calendar days to ~~45-28~~ days which is consistent with the current wording timing for payment to the holder in OAA 600–20~~2143~~ ; however, there may be situations where a fewer number of days is advisable such as for compliance with the timelines in the Construction Act. The Construction Act mandates payment by a contractor (such as the Design-Builder) to a subcontractor (such as the Consultant under a CCDC 15) within 7 days of the contractor's receipt of payment from the owner. In its CCDC 15 subcontract with the Design-Builder, however, the Consultant may contract for timely payment that is not dependent upon the Design-Builder's receipt of payment from the Owner (e.g., for payment within no later than 28 days of receipt of the Consultant's invoice).

## Design Services – Role of the Consultant

The scope of services is described in GC 3.1 DESIGN SERVICE and SCHEDULES A and B for Basic and Additional Services. The schedules in CCDC 15 are based on the RAIC DOCUMENT SIX, 2006 - Canadian Standard Form of Contract for Architectural Services and ACEC DOCUMENT 31, 2010 - Engineering Agreement between Client and Engineer. RAIC DOCUMENT SIX has been reissued/updated several times in the interim, including the most recent RAIC DOCUMENT SIX, 2022 as of the date of the Practice Tip PT.23.7. If it is to be used, the latest version should be compared with CCDC 15 for consistency. The description of services in OAA 600–20~~2143~~ –contains many updates and clarifications from the much earlier versions of these schedules in the RAIC / ACEC documents. The OAA recommends that if CCDC 15 is being used, that the ~~two~~ schedules A and B in the CCDC 15 be deleted and replaced with those contained in OAA 600–20~~2143~~, i.e. Schedule 2 Architect's Scope of- Basic Services and Schedule 3 Provision of- Additional

~~Services, or custom schedules derived from them GC 2.1 Architect's Scope of Basic Services and GC 3.1 & 3.2 Provision of Additional Services.~~ Amend the reference to "Schedule A" in CCDC 15, GC 3.1.14.1 appropriately.

If using the CCDC 15 schedules, ~~architects should~~ review the items carefully and compare them with the standard wording in the OAA 600–202113 schedules. Several items in the CCDC 15 schedules have wording which should be clarified to avoid misunderstandings later on or to avoid taking on unexpected services requirements.

### **Examples of services items which should be clarified and/or modified:**

#### **SCHEDULE A - BASIC DESIGN SERVICES AND REMUNERATION**

##### **Preliminary Phase**

- A1.1.6 documents for zoning changes - considered additional services
- A1.1.9 services for phased occupancy - considered additional services
- A1.1.15 clarify the level of service required for "participate in the preparation of an estimate ..." (also applies to other phases); similarly related to the word "involve" as it pertains to value engineering and preparing estimates of *Construction Cost* in GC 2.1.4.6 & .7.

##### **Bidding Phase**

- A1.3.3 ~~take care the appropriate standard of care should be taken whenif~~ providing advice on the "implications" of alternatives; in design-build there are often many unsolicited alternatives and requests for "equals" products, materials, equipment or systems.

##### **Construction Phase**

- A1.4.9 interpretations of *Construction Documents* is normal, but "findings" in this clause is not compatible with CCDC 14 as there is no role for the architect holder in CCDC 14 – 2013 to make a finding.

##### **Certifying Payments & Substantial Performance**

~~Refer also to comments and recommendations in PT.25 and PT 23.6.~~

The *Payment Certifier* is named in CCDC 14 – 2013 *Owner/Design-Builder Contract*. If the *Consultant* is not the *Payment Certifier*, the tasks in A1.4.12 to .15 are not required. If they are checked off in the CCDC 15 schedule of services as being required, then there is a duplication of tasks and possible conflicts may arise.

Refer also to comments and recommendations in PT.25 and PT 23.6, in addition to the following:-

- A1.4.13 & .14 *Construction Cost* reports and value of *Construction* in A1.4.14 are akin to Certificates of Payment and if the *Consultant* is not the designated *Payment Certifier* in CCDC 14, the reports should not be required. Even with another entity designated as the *Payment Certifier* in the contract, doing these items is likely an equivalent amount of work and liability as there is in being the *Payment Certifier*.
- A1.4.12 & .15 determine and certify (to the *Design-Builder*) whether the *Construction* is substantially performed. ~~(Refer to comments and recommendations in PT.25 and PT 23.6.~~

##### **Post Construction Phase**

~~Architects-Holders~~ should note that there are no "post construction" activities considered standard or basic services other than a review prior to the end of the 12 month warranty period. Traditionally the *Owner* advises the contractor of any problems during the warranty period and the contractor and trade contractors attend to them. This is how the process is stated in CCDC 14, but CCDC 15 has several items that make the *Consultant* responsible for reviewing and reporting during the 12 month warranty plus coordination of the activities of *Other Consultants* (those being the consultantones the *Design-Builder* engaged).

Schedule A, A1.5 includes services related to completion of construction that run through the one year warranty period whereas CCDC 14, GC 5.7 describes final payments and release of holdbacks in traditional timing. Schedule A, A1.5.6 notes a “final *General Review*” and report that *Construction* is completed as occurring after the *Design-Builder* corrects defects during the ~~12-12~~-month warranty.

**Other Items which are of concern and may affect liability or fees:**

- A1.5.2 assist the *Design-Builder* in commissioning activities – considered additional services
- A1.5.3 collect and organize operating and maintenance manuals – contractors’ responsibilities
- A1.5.4 final acceptance – documents at the end of the warranty period – acceptance normally occurs near substantial performance, not at the end of warranty – there is no description of what these documents ~~might be~~ may constitute.
- A.5.5 (1) review and report during the warranty period – normally reviews are not done during the warranty period, excepting possible involvement with particular problems, which these services should be considered additional services as their scope is entirely unknown and relates to defects not under the *Consultant’s* control.
- A.5.5 (2) notify the *Design-Builder* in writing of those items requiring attention – normally as in CCDC 14 the *Owner* notifies the *Design-Builder* directly.
- A1.5.6 do a final *General Review* and report upon notification by the *Design-Builder* that the defects and deficiencies referred to in A1.5.5 have been corrected and the *Construction* is completed – this is near substantial performance and not post-construction.
- A1.5.7 prepare record drawings – clarify what is expected and if editable electronic drawings (CAD/BIM) drawings files are required. (refer to comments and recommendations in PT.14 Record Drawings, As-Builts, Measured Drawings).

GC 6.1 TERMINATION AND SUSPENSION

The words “other than a default in payment” in the 2<sup>nd</sup> line of GC 6.1.7 should be deleted. GC 6.1.6 provides that non-payment is a default of the *Design-Builder*; if GC 6.1.7 is not changed, the current wording does not appear to give the *Consultant* the right to suspend services or terminate for non-payment of fees.

**Copyright & Editable Electronic Files (CAD/BIM)**

GC 1.2 COPYRIGHT AND USE OF DOCUMENTS

- 1.2.1 Recommend **amending** the last sentence to read “Their alteration by the *Design-Builder* or **any other person** is prohibited.” in order to avoid a misunderstanding that it is acceptable for others such as the *Owner* or a trade contractor to alter the drawings.

Note that CCDC 15, GC 1.2.4 requires payment to the *Consultant* as a precedent to the use of drawings and other documents whereas CCDC 14, (7.5.1) does not. In order to clarify issues related to CAD/BIM drawings being provided, the addition of new GCs is recommended:

GC 1.2 COPYRIGHT AND USE OF DOCUMENTS

Add GC 1.2.7, GC 1.2.8, GC 1.2.9 and GC 1.2.10.

- “1.2.7 “The terms *Drawings*, computer-generated designs, electronic media or instruments of service used in this *Contract* do not include editable CAD or BIM files, unless otherwise agreed by the *Consultant* in writing.”
- 1.2.8 If requested by the *Client-Design-Builder* or the *Owner* the *Consultant* shall provide editable CAD drawings and shall grant a limited licence to the *Client-Design-Builder* or the *Owner* to use the editable CAD drawings.

- 1.2.9 As a condition precedent to the use of the editable CAD drawings the ~~Client Design-Builder and Owner agrees to shall~~ indemnify and save harmless the *Consultant, his/her its Subconsultants, employees, and agents and Subconsultant* from and against any and all claims, losses, demands, costs and expenses (including legal fees), damages or recoveries (including any amounts paid in settlement) arising by reason of, caused by, or alleged to be caused by, the *Client's Design-Builder's or the Owner's, as applicable,* reliance on the editable CAD drawings.
- 1.2.10 As a condition precedent to the ~~use~~release of the ~~the~~ editable CAD drawings ~~to~~ the Owner, ~~the Design-Builder shall obtain from the Owner its agreement agrees~~ to indemnify and save harmless the *Consultant his/her employees, agents and Consultants and its Subconsultants, employees, and agents* from and against any and all claims, losses, demands, costs and expenses (including legal fees), damages or recoveries (including any amounts paid in settlement) arising by reason of, caused by, or alleged to be caused by, the Owner's reliance on the editable CAD drawings. Subject to the acceptance of the agreement by the Owner, the Consultant may release editable CAD drawings, under a limited license, according to the terms of such agreement.

## Suggested Procedure

- Become familiar with the design-build form of project delivery. Review referenced material including standard CCDC contracts and CCDC guides, the RAIC Canadian Handbook of Practice (CHOP) and OAA Practice Tips.
- If becoming involved in a design-build project or presented with CCDC 14 or CCDC 15 by an Owner or Design-Builder, review and discuss the benefits of the OAA recommendations in PTs 25, 23.6 and 23.7.
- To ~~c~~lients asking about design-build, provide information, sources for additional information, possible pros and cons from ~~personal~~professional experiences, remembering that the determination of the project delivery method is an ~~o~~Owner's decision. ~~Al~~if you ~~adv~~isinge and ~~mak~~ing strong recommendations, ~~it~~ may be seen as making a your decision or offering legal advice and may give rise to liability your /risk for the practice.
- It is very important to obtain a copy of the Owner/Design-Builder contract. Review and coordinate the 'Role of the Consultant' in that contract with the Consultant's services described in the Design-Builder/Consultant contract. Any inconsistencies should be discussed and clarified in writing.
- If there will be an Owner's Advisor designated in CCDC 14 obtain a copy of a written description of the ~~ir~~ role, responsibilities, and services. Refer to comments in PT.23.6 *Design Build: CCDC 14 – 2013*.
- Confirm who will be the Payment Certifier designated in CCDC 14 and clarify the ~~ir~~ roles and responsibilities. Refer to comments in PT 23.6 and PT.25.
- Discuss any questions regarding insurance with your insurance provider.

## References

PT.25 - *Design-Build: Using OAA 600–2021/2013, OAA 600–2013 with July 1, 2018 Amendments*

PT.23.6 - *Design Build: CCDC 14 – 2013*

CCDC website – contracts and guides

RAIC CHOP 2.3.2Chapter 4.1 Types of ~~Project Delivery~~Design Construction Program Delivery

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*The OAA does not provide legal, insurance or accounting advice. Readers are advised to consult their own legal, accounting or insurance representatives to obtain suitable professional advice in those regards.*

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## Design–Build: CCDC 15 - 2013

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### Summary

In 2013, the Canadian Construction Documents Committee (CCDC) published updated standard contract forms for design-build: CCDC 14 – 2013, *Design-Build Stipulated Price Contract* and CCDC 15 – 2013, *Design Services Contract between Design-Builder and Consultant* which replaced the earlier (2000) versions of Standard Construction Documents 14 & 15.

CCDC 15 is a services contract which a design-builder would use to engage a certificate of practice holder (“holder”). The Ontario Association of Architects (OAA) recommends the use of OAA 600–2021 amended for use on design-build projects in lieu of using CCDC 15 (refer to PT.25, Design-Build: Using OAA 600–2021); however this Practice Tip provides guidance where CCDC 15 is used.

As the holder’s contract for services is used in conjunction with the design-builder’s contract with the owner (CCDC 14), it is important to also review the Practice Tip PT.23.6, *Design-Build: CCDC 14 – 2013*.

### Background

Design-build is a form of project delivery where an owner contracts, under a single contract, with one entity (the design-builder) to provide and take contractual responsibility for both the design services and the construction.

In 2013, CCDC released new standard contract forms for design-build: CCDC 14 – 2013, *Design-Build Stipulated Price Contract*, and CCDC 15 – 2013, *Design Services Contract between Design-Builder and Consultant*. The previous 2000 versions of 14 & 15 were not endorsed by all of the CCDC constituent organizations; the 2013 version now has the consensus agreement of all: Canadian Construction Association (CCA), Construction Specifications Canada (CSC), Association of Consulting Engineering Companies Canada (ACEC) and RAIC.

The OAA supports the concept of industry standard contracts as produced by the CCDC and endorsed by RAIC but continues to believe that services contracts for OAA members should be under the purview of architectural association and recommends the use of OAA 600–2021 (Standard Form of Contract) amended for use on design-build projects in lieu of using CCDC 15 – 2013 (refer to PT.25 Design Build: Using OAA 600-2021). However, this PT has been prepared to provide guidance under situations where the use of OAA 600 is not possible and CCDC 15 is to be used.

This Practice Tip does not make an exhaustive analysis of the contract and the information provided is not a substitute for involvement of legal counsel.

### Issues

Issues of importance to holders involved in design-build projects using CCDC 15 – 2013 are described below with suggestions for management procedures and in some cases suggested wording for supplementary conditions.

CCDC contracts use the term “*Consultant*” to refer to either an architect or engineer. Where the term is used below in this Practice Tip, it refers to the holder of a certificate of practice.

## **Consultant's Subconsultants**

### Article A-1 – DESIGN SERVICES

A-1.2 ~~delete~~ the words “but not limited to” in the 1<sup>st</sup> line or otherwise qualify that the retention of any *Subconsultant* other than those listed is an additional service to the contract subject to an agreed adjustment to the fee.

## **Remuneration & Payment**

### Article A-5 REMUNERATION FOR DESIGN SERVICES

A-5.2 CCDC contracts do not include VAT or contingencies in the definition of *Construction Price or Construction Cost*. For the purposes of determining an appropriate fee, the OAA 600 and the RAIC Fee Guide have been revised and are now consistent with the approach taken by CCDC.

A-5.3 Refer to comments below on SCHEDULE A - Post Construction Phase.

A-5.7 Recommend ~~deleting~~ clause A-5.7 and replacing it with similar wording to clause 11.9 of OAA 600–2021 .

5.7 Termination expenses are in addition to compensation for the *Consultant's Design Services* and include:

- 1) expenses directly attributable to termination for which the *Consultant* is not otherwise compensated;
- 2) plus an amount for the *Consultant's* anticipated profit calculated as 10% of the value of the *Design Services* remaining to be performed by the *Consultant*; or
- 3) such other amount as may be mutually agreed.

Alternatively insert in A-5.7 the standard value given in OAA 600–2021, e.g. “10% of the value of services remaining”.

### GC 4.1 PAYMENTS

4.1.3 Recommend changing 90 calendar days to 28 days which is consistent with the current timing for payment to the holder in OAA 600–2021 ; however, there may be situations where a fewer number of days is advisable such as for compliance with the timelines in the *Construction Act*. The *Construction Act* mandates payment by a contractor (such as the *Design-Builder*) to a subcontractor (such as the *Consultant* under a CCDC 15) within 7 days of the contractor's receipt of payment from the owner. In its CCDC 15 subcontract with the *Design-Builder*, however, the *Consultant* may contract for timely payment that is not dependent upon the *Design-Builder's* receipt of payment from the *Owner* (e.g., for payment within no later than 28 days of receipt of the *Consultant's* invoice).

## **Design Services – Role of the Consultant**

The scope of services is described in GC 3.1 DESIGN SERVICE and SCHEDULES A and B for Basic and Additional Services. The schedules in CCDC 15 are based on the RAIC DOCUMENT SIX, 2006 - Canadian Standard Form of Contract for Architectural Services and ACEC DOCUMENT 31, 2010 - Engineering Agreement between Client and Engineer. RAIC DOCUMENT SIX has been updated several times in the interim, including the most recent RAIC DOCUMENT SIX, 2022 as of the date of the Practice Tip PT.23.7. If it is to be used, the latest version should be compared with CCDC 15 for consistency. The description of services in OAA 600–2021 contains many updates and clarifications from the much earlier versions of these schedules in the RAIC / ACEC documents. The OAA recommends that if CCDC 15 is being used, that the schedules A and B in the CCDC 15 be deleted and replaced with those contained in OAA 600–2021, i.e. Schedule 2 - Basic Services and Schedule 3 - Additional Services, or custom schedules derived from them. Amend the reference to “Schedule A” in CCDC 15, GC 3.1.14.1 appropriately.

If using the CCDC 15 schedules, review the items carefully and compare them with the standard wording in the OAA 600–2021 schedules. Several items in the CCDC 15 schedules have wording which should be clarified to avoid misunderstandings later on or to avoid taking on unexpected services requirements.

**Examples of services items which should be clarified and/or modified:**

SCHEDULE A - BASIC DESIGN SERVICES AND REMUNERATION

**Preliminary Phase**

- A1.1.6 documents for zoning changes - considered additional services
- A1.1.9 services for phased occupancy - considered additional services
- A1.1.15 clarify the level of service required for “participate in the preparation of an estimate ...” (also applies to other phases); similarly related to the word “involve” as it pertains to value engineering and preparing estimates of *Construction Cost* in GC 2.1.4.6 & .7.

**Bidding Phase**

- A1.3.3 the appropriate standard of care should be taken when providing advice on the “implications” of alternatives; in design-build there are often many unsolicited alternatives and requests for “equals” products, materials, equipment or systems.

**Construction Phase**

- A1.4.9 interpretations of *Construction Documents* is normal, but “findings” in this clause is not compatible with CCDC 14 as there is no role for the holder in CCDC 14 – 2013 to make a finding.

**Certifying Payments & Substantial Performance**

The *Payment Certifier* is named in CCDC 14 – 2013 *Owner/Design-Builder Contract*. If the *Consultant* is not the *Payment Certifier*, the tasks in A1.4.12 to .15 are not required. If they are checked off in the CCDC 15 schedule of services as being required, then there is a duplication of tasks and possible conflicts may arise.

Refer also to comments and recommendations in PT.25 and PT 23.6, in addition to the following:

- A1.4.13 & .14 *Construction Cost* reports and value of *Construction* in A1.4.14 are akin to Certificates of Payment and if the *Consultant* is not the designated *Payment Certifier* in CCDC 14, the reports should not be required. Even with another entity designated as the *Payment Certifier* in the contract, doing these items is likely an equivalent amount of work and liability as there is in being the *Payment Certifier*.
- A1.4.12 & .15 determine and certify (to the *Design-Builder*) whether the *Construction* is substantially performed.

**Post Construction Phase**

Holders should note that there are no “post construction” activities considered standard or basic services other than a review prior to the end of the 12 month warranty period. Traditionally the *Owner* advises the contractor of any problems during the warranty period and the contractor and trade contractors attend to them. This is how the process is stated in CCDC 14, but CCDC 15 has several items that make the *Consultant* responsible for reviewing and reporting during the 12 month warranty plus coordination of the activities of *Other Consultants* (those being the consultants the *Design-Builder* engaged).

Schedule A, A1.5 includes services related to completion of construction that run through the one year warranty period whereas CCDC 14, GC 5.7 describes final payments and release of holdbacks in traditional timing. Schedule A, A1.5.6 notes a “final *General Review*” and report that *Construction* is completed as occurring after the *Design-Builder* corrects defects during the 12-month warranty.



**Other Items which are of concern and may affect liability or fees:**

- A1.5.2 assist the *Design-Builder* in commissioning activities – considered additional services
- A1.5.3 collect and organize operating and maintenance manuals – contractors’ responsibilities
- A1.5.4 final acceptance documents at the end of the warranty period – acceptance normally occurs near substantial performance, not at the end of warranty – there is no description of what these documents may constitute.
- A.5.5 (1) review and report during the warranty period – normally reviews are not done during the warranty period, excepting possible involvement with particular problems, these services should be considered additional services as their scope is entirely unknown and relates to defects not under the *Consultant’s* control.
- A.5.5 (2) notify the *Design-Builder* in writing of those items requiring attention – normally as in CCDC 14 the *Owner* notifies the *Design-Builder* directly.
- A1.5.6 do a final *General Review* and report upon notification by the *Design-Builder* that the defects and deficiencies referred to in A1.5.5 have been corrected and the *Construction* is completed – this is near substantial performance and not post-construction.
- A1.5.7 prepare record drawings – clarify what is expected and if editable electronic drawings (CAD/BIM) files are required. (refer to comments and recommendations in PT.14 Record Drawings, As-Builts, Measured Drawings).

**GC 6.1 TERMINATION AND SUSPENSION**

The words “other than a default in payment” in the 2<sup>nd</sup> line of GC 6.1.7 should be deleted. GC 6.1.6 provides that non-payment is a default of the *Design-Builder*; if GC 6.1.7 is not changed, the current wording does not appear to give the *Consultant* the right to suspend services or terminate for non-payment of fees.

**Copyright & Editable Electronic Files (CAD/BIM)**

**GC 1.2 COPYRIGHT AND USE OF DOCUMENTS**

- 1.2.1 Recommend **amending** the last sentence to read “Their alteration by the *Design-Builder* or any **other person** is prohibited.” in order to avoid a misunderstanding that it is acceptable for others such as the *Owner* or a trade contractor to alter the drawings.

Note that CCDC 15, GC 1.2.4 requires payment to the *Consultant* as a precedent to the use of drawings and other documents whereas CCDC 14, (7.5.1) does not. In order to clarify issues related to CAD/BIM drawings being provided, the addition of new GCs is recommended:

**GC 1.2 COPYRIGHT AND USE OF DOCUMENTS**

Add GC 1.2.7, GC 1.2.8, GC 1.2.9 and GC 1.2.10.

- “1.2.7 “The terms *Drawings*, computer-generated designs, electronic media or instruments of service used in this *Contract* do not include editable CAD or BIM files, unless otherwise agreed by the *Consultant* in writing.”
- 1.2.8 If requested by the *Design-Builder* or the *Owner* the *Consultant* shall provide editable CAD drawings and shall grant a limited licence to the *Design-Builder* or the *Owner* to use the editable CAD drawings.
- 1.2.9 As a condition precedent to the use of the editable CAD drawings the *Design-Builder* shall indemnify and save harmless the *Consultant*, its *Subconsultants*, employees and agents from and against any and all claims, losses, demands, costs and expenses (including legal fees), damages or recoveries (including any amounts paid in settlement) arising by reason of, caused by, or alleged to be caused by, the *Design-Builder’s* or reliance on the editable CAD drawings.

1.2.10 As a condition precedent to the release of editable CAD drawings to the *Owner*, the *Design-Builder* shall obtain from the *Owner* its agreement to indemnify and save harmless the *Consultant* and its *Subconsultants*, employees, and agents from and against any and all claims, losses, demands, costs and expenses (including legal fees), damages or recoveries (including any amounts paid in settlement) arising by reason of, caused by, or alleged to be caused by, the *Owner's* reliance on the editable CAD drawings. Subject to the acceptance of the agreement by the *Owner*, the *Consultant* may release editable CAD drawings, under a limited license, according to the terms of such agreement.

## Suggested Procedure

- Become familiar with the design-build form of project delivery. Review referenced material including standard CCDC contracts and CCDC guides, the RAIC Canadian Handbook of Practice (CHOP) and OAA Practice Tips.
- If becoming involved in a design-build project or presented with CCDC 14 or CCDC 15 by an *Owner* or *Design-Builder*, review and discuss the benefits of the OAA recommendations in PTs 25, 23.6 and 23.7.
- To clients asking about design-build, provide information, sources for additional information, possible pros and cons from professional experiences, remembering that the determination of the project delivery method is an owner's decision. Advising and making strong recommendations may be seen as making a decision or offering legal advice and may give rise to liability/risk for the practice.
- It is very important to obtain a copy of the *Owner/Design-Builder* contract. Review and coordinate the 'Role of the *Consultant*' in that contract with the *Consultant's* services described in the *Design-Builder/Consultant* contract. Any inconsistencies should be discussed and clarified in writing.
- If there will be an *Owner's Advisor* designated in CCDC 14 obtain a copy of a written description of their role, responsibilities, and services. Refer to comments in PT.23.6 *Design Build: CCDC 14 – 2013*.
- Confirm who will be the *Payment Certifier* designated in CCDC 14 and clarify their roles and responsibilities. Refer to comments in PT 23.6 and PT.25.
- Discuss any questions regarding insurance with your insurance provider.

## References

PT.25 - *Design-Build: Using OAA 600–2021*

PT.23.6 - *Design Build: CCDC 14 – 2013*

CCDC website – contracts and guides

RAIC CHOP Chapter 4.1 Types of Design Construction Program Delivery

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FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.1

## President's Log

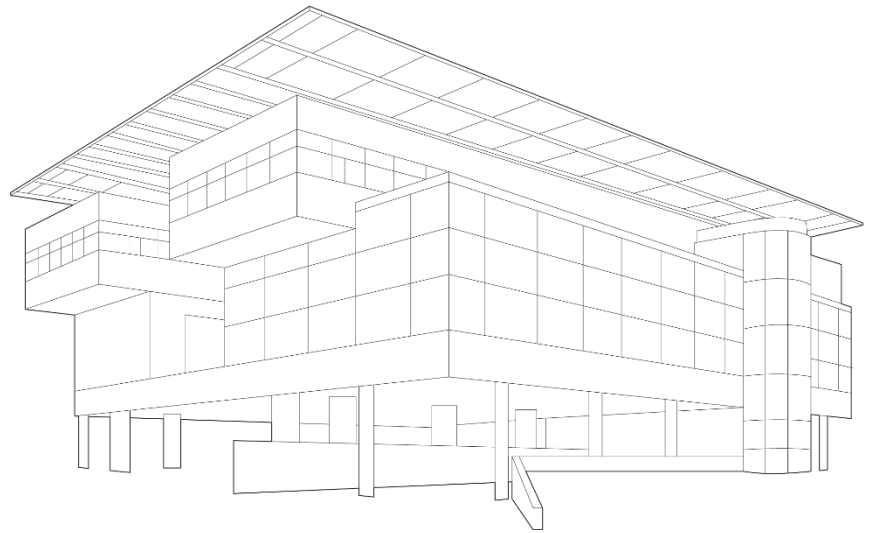
Date	Event/Meeting	Location	Attendees	Time
December 10	OALA Draft Legislation Meeting	Virtual meeting	w/K.Doyle	2-2:30 p.m.
December 10	New Councillor Orientation	Virtual meeting	w/D.Ardiel, D.Paquette, K.Doyle, T.Carfa	3-5:00 p.m.
December 11	AATO v. OAA Examinations Prep Meeting	Virtual meeting	w/Laura Wagner	9-10:00 a.m.
December 11	Grand Valley Society Visit	Stratford	w/Society members, B.Birdsell, K.Doyle	6-9:00 p.m.
December 12	London Society Visit	London	w/Society members, B.Birdsell, K.Doyle	4:30-7:00 p.m.
December 13	President/Executive Director Meeting	Virtual meeting	w/K.Doyle	8-9:00 a.m.
December 16	AATO v. OAA Examinations	Virtual meeting	w/Laura Wagner	3 - 4:30 p.m.
January 3	President/Executive Director Meeting	Virtual meeting	w/K.Doyle	8-9:00 a.m.
January 8	Executive Committee	Virtual meeting	w/Executive Committee	11:00 a.m. - 12 noon
January 13	Governance Committee	Virtual meeting	w/committee members	9:00 a.m. - 12 noon
January 14	OALA Draft Legislation Meeting	Virtual meeting	w/K.Doyle	1:30-2:30 p.m.
January 17	President/Executive Director Meeting	Virtual meeting	w/K.Doyle	8-9:00 a.m.
January 20	Prep for Council meeting	Virtual meeting	w/K.Doyle, C.Mills, T.Carfa	3:30-4:30 p.m.
January 22	Pre-Council Dinner	Toronto	w/Council	7-9:30 p.m.
January 23	Council Meeting	Toronto	w/Council, staff	9:30 a.m. - 2:00 p.m.
January 23-24	Annual Governance Workshop	Toronto	w/Council, staff	1.5 days

# Executive Director Report to Council

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FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.3

January 23, 2025



PRESENTED BY

**Kristi Doyle**  
**Executive Director**



Ontario Association  
of Architects

The Executive Director's Report to Council provides an overview of key **operational and administrative matters as well as updates on progress towards achievement of the OAA's 5-year Strategic Plan.** Specifically, this report focusses on items not covered elsewhere in the meeting agenda. Items within this report have been organized in response to the 4 pillars of the 5-year Plan:



**regulatory leadership**



**governance and operations**



**member competency**



**public education**

## OAA Strategic Plan

The January Council package includes the OAA management team's individual service area year-end reports. These reports focus on activities and achievements related to administration, operations, programming and services between July 1 and December 31. The first 6 months of the calendar year reports were provided to Council in June.

Council will receive the full 2024 'year end' report on the achievements towards the OAA Strategic Plan at the planning session in January. This represents the completion of 'year-three' under the Plan. During the planning session, Council will also spend time reflecting and reconfirming its commitment to the 5-year Strategic Plan. The Plan continues to provide a solid foundation for the OAA staff and governing Council to focus the Association's resources.

The OAA's 2024 Annual Report will also provide further detail on achievements under the Plan, which will be finalized after the January planning session.



## Governance & Operations

As noted above the OAA Management Team has provided comprehensive year-end reports as part of this agenda package. I will not reiterate the content and achievements outlined in those reports. I will however draw Council's attention to them and emphasize the considerable amount of work and extensive set of deliverables that we, both Council and staff, have accomplished over the past year across the breadth of the Strategic Plan objectives.

The final Report on the implementation of the 39 recommendations stemming from the 2021 Operational Review will be presented to Council at its January 2025 annual planning session. This achievement is one of the main deliverables under the OAA Strategic Plan – a massive undertaking that was set against a 5-year implementation schedule. Through appropriate allocation of resources, tracking and a clear commitment, we have achieved this major objective.

The OAA's IT infrastructure transition to Office 365 continues and weekly staff chat sessions have included ongoing updates, preliminary training and transition discussions. This will continue to be a major focus in 2025.

The Team Leads met on December 16 to discuss their year-end reports noted above, and presentation of those reports at the January planning session. The Team has been collectively focused on the presentation style and format as well as other individual presentation segments. Council will also hear from each of the Team Leads about the day-to-day core activities in each of their services areas, as well as a review of major projects and activities already 'on the books' for 2025.

As usual, staff have been busy since the last Council meeting addressing the necessary operational and administrative matters related to the new calendar year and change in Council. This also includes changes in the composition of the OAA committees. Committee orientation and training will take place in early February. This is an annual undertaking and an important tool towards ensuring a clear understanding of mandates, committee roles and responsibilities as well as deliverables for the year. The OAA relies heavily on volunteers to assist in the furtherance of our mandate, goals and objectives, and accordingly it is important for those volunteers to have the information and training they need to fulfill their role.

Addressing organizational gaps and building capacity amongst the OAA staff team continues. A key component of this included the recent appointment of Kathy Armbrust as OAA's Chief Operating Officer.

At the close of 2024, the OAA ended its long-term contract with an outside file storage facility which translates into considerable savings for the OAA. This included the recall of a large number of boxed files from that facility. Staff will be culling these files over the coming months and scanning items that should be retained or archived.

OAA Auditors, BDO are well underway with the OAA's annual audit under the guidance of OAA Manager, Finance Melanie Walsh. This is a busy time of year for the OAA Finance team as annual renewals are also underway.



## Public Education

The annual orientation session for the local Society Chairs and Councillor Liaisons has been scheduled for Monday February 3 via



Zoom. The Societies and the work that they do is an important part of the OAA culture and assists in the achievement of our goals and objectives around public education and awareness. We will continue to place focus this year on supporting the OAA Societies and working to find ways to address some of the challenges they have identified.

Discussion regarding the funding of the OAA's local architectural societies is continuing with the input of the Governance Committee.

The President's annual visit with each of the local architectural societies concluded on December 12 in London. The return to in-person meetings provided a positive opportunity for networking and informal discussion in addition to the formal agenda. All 14 local societies participated in these meetings. The following items were covered, however the agenda and discussion varied based on the desire of the local members:

- Update on OAA demographics and statistics.
- Update on current OAA activities and specific initiatives including the Strategic Plan; OAA Landscape Project; Limited Licences and the OAA Technology Program; the new OBC; Industry discussions and the OAA's input into public policy initiatives
- Open discussion on issues of local concern and interest.

Work on the Landscape Project, one of our major climate action, EDI and public outreach projects, is moving ahead well as reported elsewhere in the agenda package.

The OAA will assist Becoming Architects Canada (BAC) with outreach to the other provincial regulators via ROAC later this month.

I attended the final Board meeting of the Construction & Design Alliance of Ontario (CDAO) on December 3 in Vaughan. The final meeting of the CDAO Forum took place on December 16. Of specific note is the CDAO's engagement of a third-party consultant to develop the planned 'Procurement Best Practices' document. The Board will be overseeing the project on behalf of the CDAO and delivery of the draft is anticipated later this spring. Once finalized, this procurement guide will be an important tool for industry organizations and resource for procurement officials.



Sharing of information and resources regarding the new OBC 2024 is continuing. This includes training opportunities available through other organizations. The next meeting of Engineers, Architects, & Building Officials (EABO) will be held in February, during which collaboration towards additional training opportunities will be discussed.



## Regulatory Leadership

Of considerable note since the last Council meeting was the filing of the amendments to Regulation 27 under the *Architects Act* to allow for the issuance of Limited Licences by the OAA. As a priority, the OAA Website and information pertaining to the OAA Technology Program (OTP) was updated accordingly and promptly communicated. The OAA began accepting applications for Limited Licence effective January 1, 2025. As of January 15, 44 applications have been received.

Applications for enrolment in the OTP will be available as of January 24, 2025. Roll out of other facets of the Program will continue over the coming weeks and months including further communication targeted towards a variety of audiences such as OAA members, building officials, and Ontario colleges.

Along with ExAC Co-Administrator Jon Clark, I am involved in a working group that is reviewing the final Report from a third-party consultant regarding online exam delivery and software options for the ExAC. A summary of the recommendations will be prepared for the Spring ROAC meeting and further discussion will take place.

On January 14, OAA President Settimo Vilardi and I met with representatives of the Ontario Association of Landscape Architects to receive an update on their pursuit of practice legislation. Their efforts have been ongoing for close to a decade.

I met with Sharon Portelli, Executive Director of the Association of Registered Interior Designers Ontario (ARIDO) for our periodic check-in on December 6. As part of the OAA's Act Modernization project, it will be appropriate to resume our collaborative efforts on the regulation of interior design under the *Architects Act*, as previously directed by the government.



# Office of the Registrar Statistical Report

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FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.4

2024 YEAR END REVIEW

PRESENTED BY

**Christie Mills**

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Ontario Association  
of Architects

The Registrar's Report to Council provides an overview of key statutory matters and statistics, both ongoing and planned. Items of regulatory importance to the Association include information on the activities of the following:

- The Experience Requirements Committee (ERC).
- The Complaints Committee.
- The Discipline Committee.
- The Registration Committee.
- Act Enforcement.

The report also provides statistical information regarding:

- OAA membership and OAA status composition.
- Licence applications.
- OAA Certificate of Practice composition.
- Certificate of Practice applications.
- Growth statistics of the above.

The Association's principal objective is to protect users and potential users of professional architecture services by governing its licensed members, including holders of certificates of practice and temporary licences, so that the public can be confident OAA members are appropriately qualified and meet the requirements at law to practise architecture. As a self-regulated professional organization, the OAA is authorized by the Government of Ontario, under provincial statute to establish, monitor, and enforce standards of practice and performances for its members and practices. For the purpose of carrying out these objectives, the Association relies on statutory committees and processes; the statistics of which are highlighted below.

## Experience Requirements Committee (ERC)

Upon referral, the Experience Requirements Committee determines if an applicant has met the experience requirements prescribed by the Regulations forming part of the eligibility requirements for the issuance of an OAA licence.

As per Section 13(3)b of the *Architects Act*, the Registrar, on their own initiative, can (and on the request of an applicant, *shall*) refer an application for the issuance of licence to the ERC for a determination as to whether the applicant has met the experience requirements prescribed by the Regulations for the issuance of licence. Additionally, the Committee will determine as to whether the applicant has met the experience requirements prescribed by the Regulations for the issuance of licence in matters related to [Exemption Requests to Council](#) as set out in Section 33 of the Regulations.

- Three (3) assessment interviews were held in 2024.

The statutory requirement for confidentiality is established section 43 of the Act. It requires the Registrar and committee members maintain "*secrecy with respect to all matters that come to an individual's knowledge in the course of their duties*". Section

13(6) states that the Registrar shall give notice to the applicant of the ERC decision; though, is not authorized to share the results to anyone else.

There is an exception in s.43 to allow the Registrar to share information “as may be required in connection with the administration of” the Act, regulations and by-laws.

Upon review, there is an argument that data related to successful vs unsuccessful applications may be provided to Council. There is also an argument that the Registrar share general data trends that have arisen from the ERC assessments that may be relevant to the work of Council. Assuming this data can be connected Council’s work in the administration of the Act, the table summary below can be provided on an ongoing basis:

	Reason	2024 Result	Deficiency
ERC Recommendations to Council	CY	Recommendation that the experience meets the requirements.	
ERC Determinations	CI	Does not meet requirements. Remedial action required.	<ul style="list-style-type: none"> <li>- Recommendation for more experience in complex buildings.</li> <li>- Required to complete two courses.</li> </ul>
	IAP-D	Does not meet requirements. Remedial action required.	<ul style="list-style-type: none"> <li>- Lack of minimum required competency Construction Contract Administration; General Review; General understanding of the performance roles of materials; Ontario Building Code requirements.</li> <li>- Recommendation for more experience in complex buildings.</li> <li>- Required to complete 600 hours of IAP experience.</li> </ul>

*CI: applicant using international experience gained prior to enrolment in IAP*  
*CY: Currency*  
*IAP-D: Internship in Architecture CERB deficiency.*

## Complaints Committee

As the regulator of the practice of architecture in Ontario, the OAA handles complaints regarding the conduct or competency of a member or practice of the OAA. The [Architects Act, R.S.O. 1990, c. A.26](#) prescribes the complaints process to ensure the public interest in Ontario is served and protected. A complaint may be made if there is concern a member of the OAA (Architect, a holder of a Certificate of Practice, or holder of a Temporary Licence) has contravened the *Architects Act* or has engaged in professional misconduct as set out in the Regulations (R.R.O. 1990, Reg. 27, s. 42).

With the regulation update incorporating the modernized ConEd non-compliance procedures, OAA staff will be dedicated to its implementation and administration accordingly in 2025 and beyond.

Below are the Complaints Committee statistics for 2024:

Total Inquiries <sup>1</sup>	83
Total Complaints	21
Held in abeyance	2
Preliminary Review Stage	1
Closed	
Not referred (dismissed)	9
Not referred (withdrawn)	2
Not referred (caution)	2
Referred to Discipline	3
Registrar's Investigations <sup>2</sup>	13
Good Character Investigation	7
2022-2024 ConEd Non-Compliance Matters <sup>3</sup>	181

## Discipline Committee

Discipline decisions are the result of hearings conducted by a tribunal comprising two senior members of the OAA and a Lieutenant Governor in Council Appointee (LGIC) from the Discipline Committee. The Discipline Committee hears allegations of professional misconduct against members of the Association, holders of a Certificate of Practice, or holders of a Temporary Licence.

Allegations may arise through:

- referral of a matter by the Complaints Committee; or
- Council directing the Discipline Committee to conduct a hearing into allegations of professional misconduct in a specific situation.

The following are the statistics for 2024:

- One matter was scheduled to be heard in the spring however the Committee withdrew the charges on the condition of an Undertaking by the member. This matter subsequently returned to the Committee for a hearing in October. The former member has appealed the resulting Committee's decision to divisional court.
- One discipline appeal to divisional court was closed out.
- There are seven (7) matters to be scheduled in 2025.

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<sup>1</sup> Any communication about a member's professional misconduct. This number includes matters that has since been referred to complaints, however, not all complaints began as inquiries.

<sup>2</sup> Not yet referred to complaints

<sup>3</sup> Refer to Continuing Education year end report for more details.

For 2025, the Office of the Registrar plans a full review of all Discipline Committee policies and procedures in accordance with the Regulatory Leadership goal pillar of the Strategic Plan.

## Registration Committee

When the Registrar proposes to refuse (Notice of Proposal (NoP)) an application for licence, certificate of practice or temporary licence; proposes to suspend or revoke a certificate of practice or temporary licence; or, proposes to issue a licence, certificate of practice or temporary licence with terms, conditions and limitations, the applicant may request a hearing before the Registration Committee. The Committee hears the matter and makes a determination as to the proposal by the Registrar.

The hearing is held before a panel of three members of the Registration Committee. A Registration hearing is not an appeal and is not a review of the decision made by the Registrar. A hearing is an opportunity for an applicant to present evidence in support of their application. The applicant bears the onus of satisfying the Registration Panel, on reasonable grounds, that they meet the requirements of the Act and the regulations for the purpose of issuance of a licence or Certificate of Practice.

The [OAA website](#) dedicated to the Registration Committee includes recent requested hearings and the associated hearing dates. This aligns with the expectations of the [Statutory Powers Procedure Act, R.S.O. 1990, c. S.22 \(ontario.ca\)](#) and infuses more transparency on the OAA website. Committee Decisions and Reasons are also posted for any hearings resulting in a decision and order to issue a licence.

On July 5, 2024 the Chair of the Registration Committee ordered that further scheduling of Registration hearings be suspended until the Notice of Motion advanced by the AATO is resolved. This decision was communicated to all hearing applicants on July 8, 2024. The communication can be summarized as follows:

*“On Thursday, July 4, 2024, the OAA was served with a draft Notice of Motion from the Association of Architectural Technologists of Ontario (AATO). The AATO is alleging that the OAA is in contempt of the May 2023 order. The AATO appears to be alleging that by accepting and processing applications for licenses from former Licensed Technologists OAA, and adhering to the requirements of the Architects Act, the OAA has contravened the May 2023 order. The OAA intends to defend itself against the AATO motion. However, as a result of the AATO bringing its motion, the Registration Committee has advised that it will not schedule any further hearings. To be clear, this is not out of concern that the OAA has contravened the May 2023 order but rather to communicate to the court that the OAA treats such matters seriously.”*

The Registration Committee statistics for the year are as follows:

- Three (3) new hearings were requested in 2024.
- Nine (9) hearings were completed in 2024.
- Twenty-five (25) hearings are to be scheduled.

# Act Enforcement

The Act restricts the practice of architecture to members of the OAA providing professional services through a Certificate of Practice issued by the OAA. The practice of architecture includes:

- the preparation or provision of a design to govern the construction, enlargement, or alteration of a building;
- evaluating, advising on, or reporting on the construction, enlargement, or alteration of a building; or
- the general review of the construction, enlargement, or alteration of a building.

It is an offence for an unlicensed person (including a corporation) to use the term “Architect”. It is also an offence to hold oneself out as engaging in the practice of architecture without a licence issued by the OAA.

Misrepresentation of the protected title “Architect” and misleading claims or advertising (inadvertently or purposely) could lead the public to conclude they would be receiving architectural services from a licensed and regulated professional.

The OAA’s regulatory mandate includes taking action against those unlawfully providing architectural services. The *Architects Act* and its Regulations outline specific exceptions, but outside of these, the OAA may take legal action. The OAA will investigate when a possible infraction is brought to its attention. If it appears illegal practice has occurred, the OAA may do one or more of the following:

- Send an inquiry letter advising of the concerns, and request specific corrective action. This is a common first step in the case of misrepresentations.
- Request the individual sign an undertaking and covenant agreement, which includes an acknowledgment of the breach of the *Architects Act* and agrees to compliance in the future.
- Pursue financial damages or injunctive relief through the courts.

Below are the act enforcement statistics for 2024:

New matters received for reporting period	83
Active files/ Ongoing investigations	56
Resolved by Legal Counsel	0
Resolved by OOTR for reporting period	9
Unable to locate	2
No breach found	16
Injunctions (ongoing)	0
Injunctions (resolved)	0

## Internship in Architecture Program

In addition to the regular day to day administration of the program which included the review and processing of 1643 IAP experience submissions, the OAA staff have been undertaking the following through 2024:

- Implementation of a new online CERB portal via iMIS.
- Launch and implementation of new licensing requirements as of February 2, 2024, related to the FARPACTA prohibition on Candain experience:
  - o Develop, test and launch Ontario Practice Competency self-assessment online portal, PDF version, Instructional Guide, FAQs.
  - o Implement and administer regulation amendments re. new Ontario licensing requirements as of February 2, 2024.
  - o Update OAA website (IAP pages) with the new Ontario licensing requirements, developed scheduled communications to the OAA membership, Intern Architects and Student Associates.
  - o Create new tabs on IMIS database pertaining to the new Ontario licensing requirements.
- Assist in updates the Mentorship Guide.
- Develop and implement updates to the Intern Architect and Student Associate application interface via iMIS (e.g. ability to upload CACB certification, student declaration form).
- Assist in updates to the Student Associate, Intern Architect and IAP pages of the OAA website and associated resources.
- Develop incorporation of a new IMIS feature to capture non-consecutive Intern Architect over 5 years in order to apply the appropriate Intern Architect fee (applicable to renewals and re-applications).
- Attend and present within programs of the JVS and TSA, provide information to respective participants during Q&A.
- Ongoing training of IAP staff.

## OAA Technology Program (paused)

The following is an account of the 2024 activities related to the anticipated launch of the OAA Technology Program (OTP).

On February 13, 2023, the OAA paused accepting any new applications for the Program. The administration of the program was paused until the Act and regulations permit the limited licence class to be issued. The OAA voided the status of individuals enrolled in the program: 172 Intern Technologists and 13 Student Technologists.

In the interim, staff focused on the organization and reconciliation of all inherited OAAAS files and program information in anticipation of the Act and regulation amendments coming into force. This required extensive work based on the condition of content received such as:

## **Program Guide**

Review and finalized the 2025 OAA Technology Program Guide.

## **File ERB Data Migration**

Completed review of all OTP ERB submissions for 163 former Licensed Technologists and 412 Intern Technologists to create a summary of individual multiple submissions and create a database for the IT developer to migrate over to iMIS. ERB data migration is an essential step to move towards the launch of the online ERB.

## **Experience Record Book (ERB)**

ERB Data Migration completed in June 2024.

Approved hours of previous Licensed Technologists and Intern Technologists were entered into master list that was used by the BSI and OAA IT to migrate experience hours data into iMIS in preparation for the online ERB development.

The online version of the ERB has been completed. In 2024, resumed work with BSI to develop an online Experience Record Book portal. This includes identification of needed features to assist the review process and ease of use for Intern Technologists and Student Technologists. Completed testing of the whole ERB process in the production environment for every user: Student Technologist, Intern Technologist, Supervising Professional, Mentor and Staff.

The Guide to the OAA Technology Program Experience Record Book has been updated to include online ERB instructions and added to the OAA website's useful links.

## **Analysis on Equivalency/Accreditation and Comparative Research**

Reviewed the different credentials evaluation services available to identify which assessment type would be suitable in providing Canadian equivalency of internationally earned education for admission to the OAA Technology Program as an Intern Technologist. Research undertaken to support future alternative qualification considerations by Council.

## **Ontario Practice Competency: Self Assessment**

Experience Assessment form and Guide has been completed for OTP.

Partially pre-filled experience self assessment form has been added to former Licensed Technologists' member file with a summary of approved hours in preparation for their application for limited licence in 2025.

## **Applications**

Reviewed the online application system for OTP in anticipation of the January launch for Student Technologists and Intern Technologists. This project is ready to go live when the program fees (Intern Technologist fee, ERB late charge) are available in the Bylaws.

## **OTP Website Pages**

Worked with OAA Communications to update OTP pages of the website, providing more information for the launch of the program and quick access to relevant forms and resources. Current dedicated webpages include:

- [Becoming a Licensed Technologist](#)
- [Student Technologist](#)



- [Intern Technologist](#)
- [Recording Experience](#)
- [Working with a Supervising Professional and Mentor](#)
- [Licensed Technologist Examination](#)
- [Canadian Experience Alternative](#)
- [OTP Experience Assessment](#)
- [Licensed Technologist](#)
- [Limited Licence Practices](#)
- [Limited Licence: FAQs on Limited Licences, those impacted by the 2023 Court Order and the OAA Technology Program.](#)

### **Student Technologist Work Hours**

Gathered information on the timing of work terms for the ten colleges offering co-op under their architectural technology programs. This research will support any future student submissions for those enrolled in the OTP.

## Licensure & Practices

The Act restricts the practice of architecture to licensed members of the OAA providing professional services through a Certificate of Practice issued by the OAA.

Architects are highly trained professionals who have been licensed by the OAA. As members of the OAA, they are bound by the [Architects Act](#) and OAA Bylaws, and are expected to comply with the OAA's Code of Ethics. Once licensed, all architects must maintain their membership in good standing inclusive of the OAA mandatory Continuing Education (ConEd) Program and, for practices, mandatory professional liability insurance.

The OAA confirms the competence of its members through a rigorous process:

- meeting the education requirement;
- completing professional internship;
- passing extensive examinations;
- completing the competency self-assessment;
- completing the OAA Admission Course; and
- being a person of [good character](#)

Over the course of 2024 the Office of the Registrar processed the following:

- licence applications received were 412.
- licences issued were 329 of which 316 were new and 13 were reapplications or reinstatements.
- Certificate of Practice applications received were 181.
- Certificate of Practices issued were 139 of which 113 were new or changes in particulars, 10 were reapplications/reinstatements/other office and 16 were temporary licence/limited Certificate of Practice.

- 141 licence surrenders and 33 cancellations.
- 159 letters of good standing.
- 243 confirmation of registration letters.
- 184 OAA seals were issued.
- 21 Notice of Default with Intention to Cancel notices for non-payment/non-renewal with ProDemnity.

## Correlated Legislative Matters

### Office of the Fairness Commissioner

The Fairness Commissioner assesses the registration practices of [regulated professions and trades](#) in Ontario to make sure they are transparent, objective, impartial and fair for anyone applying to practise their profession in Ontario.

The Office of the Fairness Commissioner (OFC) supports the Fairness Commissioner in acting on the mandate set out in the [Fair Access to Regulated Professions and Compulsory Trades Act, 2006](#) (FARPACTA) and the [Regulated Health Professions Act, 1991](#) (RHPA).

The OFC launched its new Risk-Informed Compliance Framework (RICF), which came into effect on April 1, 2022. This framework relies both on the regulator's historical performance, and a series of forward-looking risk factors that could impact a regulator's ability to achieve better registration outcomes for applicants.

In November 2023, the OFC implemented the second iteration of its RICF for the 2023-2024 period. Under this framework, the OFC assesses each regulator's operations against five risk factors that may impede the regulator's ability to apply fair registration practices for the licensure of domestic and internationally trained applicants; the five risk factors are set out below:

1. Organizational capacity.
2. The overall control that a regulator exerts over its assessment and registration processes.
3. The impact of major changes to registration practices and relations with third-party service providers.
4. The ability of the regulator to comply with newly introduced legislative and / or regulatory obligations.
5. Public policy considerations:
  - a. Addressing labour market shortages.
  - b. The ability to promote inclusion and address anti-racism concerns in registration processes.

For the OAA's 2023/2024 RICF, the OFC has identified three areas of risk that will require actions plans to address these concerns. The three identified risks are as follows:

- *Ensure that the OAA's CER alternative(s) comply with the applicable regulatory criteria and facilitate the timely registration of experienced architects from international jurisdictions.* To this end, the OAA may wish to approach other

regulators that have eliminated their CERs, or introduced a full competency-based assessment alternative, to compare their experience and approach. The OFC will also want to monitor the number of internationally experienced architects who are accessing alternatives to the IAP, and the number who are successfully licensed.

- *Continue to disseminate public information on all pathways to licensure available for internationally experienced architects and ensure that these modalities are easily accessible and understood.*
- *Implement a thoughtful implementation plan to reinstate the OAA's Lic.Tec.OAA licensees and ensure that this work is undertaken fairly, efficiently and through a client-focused lens.*

The Office of the Registrar completed its first meeting in June with the assigned OFC Analyst to review progress made on these three items. The second (quarterly) meeting was completed September 3, 2024. In order to address the identified risk areas:

- Item number one is tracking the potential for a new national CACB/ESDC project.
- Item number two can be considered complete with the updated OAA webpage [International Credentials and Professional Mobility \(oaa.on.ca\)](https://www.oaa.on.ca).
- Item number three is tracking the implementation of the legislation and regulation for limited licences.

### **FARPACTA Recent Amendments**

The period of 2022 and 2024 saw many changes to the *Fair Access to Regulated Professions and Compulsory Trades Act* (FARPACTA) that compelled all Ontario regulators to examine and, in many cases, change their registration practices. The FARPACTA continues to evolve with the following amendments filed on **November 28, 2024**.

**Of particular interest are regulator requirements for policy review and approval by the Fairness Commissioner.**

### **Third Party Service Providers**

#### ***Third party assessments (from the FARPACTA regulations)***

**1.1.2 (1)** *This section sets out the requirements referred to in clause 10 (3) (b) of the Act for determining whether a regulated profession has taken reasonable measures to ensure that a third party makes assessments of qualifications in a way that is transparent, objective, impartial and fair.*

**(2)** *A regulated profession shall enter into an agreement with the third party respecting the roles and responsibilities of the regulated profession and the third party in relation to making assessments, and the agreement shall include the following provisions, as applicable:*

**1.** *Provisions setting out the assessment criteria and methods that the third party is required to use in assessments and the minimum exam scores for a pass.*

**2. Provisions setting out how frequently exams and other types of assessments are offered and, wherever feasible, indicating that applicants will have access to exams and other types of assessments at least three times in a calendar year.<sup>4</sup>**

3. Provisions setting out the timelines for completing each step of the assessment process and the knowledge and expertise requirements for assessors.

4. Provisions requiring the third party to, within 10 business days after an assessment decision is made, communicate the decision in writing, with reasons for the decision and details of competency gaps in cases of negative assessment decisions.

5. Provisions requiring a third party to,

i. have a process for applicants to request an appeal or review of an assessment decision;

ii. ensure that any appeal or review is conducted by a person or panel who is impartial and independent; and

iii. within 15 business days after receiving an applicant's written request for an appeal or review, notify an applicant whether an appeal or review will be conducted and,

A. if an appeal or review will not be conducted, state the reasons for the decision, and

B. if an appeal or review will be conducted, provide a date or timeframe for the appeal or review.

6. Provisions requiring the third party to report aggregate data and other information to the regulated profession, including information respecting,

i. applicants' assessment performance, including information relating to success rates and trends to identify areas for improvement, and

ii. the length of time it takes applicants to complete the assessment steps.

(3) A regulated profession shall provide clear, complete and accurate information to applicants about a third party's roles and responsibilities, including the following:

1. The timelines within which a third party will complete each step of the assessment process.

2. Information about the assessment criteria and methods used by the third party.

3. What alternatives to the documentation of qualifications normally required for an application are acceptable to the third party.

4. The fees the third party charges applicants for making assessments.

5. A statement that the third party is required to provide reasons for assessment decisions to applicants and information about how to seek an appeal or review of a decision.

(4) A regulated profession shall establish a complaints process for addressing complaints by applicants about their experiences with third parties that make assessments of qualifications, and shall inform applicants about the process.

(5) A regulated profession shall ensure that the following information is easily accessible to applicants online:

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<sup>4</sup> Emphasis added.

1. *The information referred to in subsection (3).*
2. *Information about the complaints process referred to in subsection (4).*

### **Alternative Documentation**

#### ***Policy re reasonable alternatives to required documentation (from the FARPACTA with further details in the regulations)***

12.1 (1) *A regulated profession shall have a policy addressing what alternatives to the documentation of qualifications that is normally required will be acceptable. 2024, c. 19, Sched. 3, s. 2.*

(2) *The policy must,*

(a) *provide that the regulated profession will accept reasonable alternatives to the documentation that is normally required if the required documentation cannot be obtained for reasons beyond an applicant's control;*

(b) *describe what constitutes a reasonable alternative;*

(c) *include the timelines within which the regulated profession will process such alternative documentation and inform the applicant of the next steps; and*

(d) *comply with any requirements set out in the regulations respecting the policy, including respecting how the policy must address the matters described in clauses (a) to (c). 2024, c. 19, Sched. 3, s. 2.*

#### ***Submission of policy to Fairness Commissioner***

(3) *A regulated profession shall submit the policy to the Fairness Commissioner for review. 2024, c. 19, Sched. 3, s. 2.*

#### ***Updating policy***

(4) *Whenever there is a change in circumstances that may affect the policy, the regulated profession shall update it and submit it to the Fairness Commissioner for review. 2024, c. 19, Sched. 3, s. 2.*

#### ***Fairness Commissioner's input and approval***

(5) *Before implementing a policy or updated policy, a regulated profession shall,*

(a) *respond to any input from the Fairness Commissioner regarding the policy or updated policy; and*

(b) *if the regulations so provide, obtain the Fairness Commissioner's approval of the policy or updated policy or implement the changes to the policy or updated policy required by the Fairness Commissioner.*

### **Parallel Processing**

#### ***Plan re parallel processing (from the FARPACTA with further details in the regulations)***

12.2 (1) *A regulated profession shall have a plan addressing how it will enable multiple registration processes to take place concurrently. 2024, c. 19, Sched. 3, s. 2.*

(2) *The plan must,*

(a) permit applicants who experience a delay in one part of the registration process to proceed with other parts of the registration process wherever possible; and

(b) comply with any requirements set out in the regulations respecting the plan, including respecting how the plan must address the matter described in clause (a). 2024, c. 19, Sched. 3, s. 2.

### **Submission of plan to Fairness Commissioner**

(3) A regulated profession shall submit the plan to the Fairness Commissioner for review. 2024, c. 19, Sched. 3, s. 2.

### **Updating plan**

(4) Whenever there is a change in circumstances that may affect the plan, the regulated profession shall update it and submit it to the Fairness Commissioner for review. 2024, c. 19, Sched. 3, s. 2.

### **Fairness Commissioner's input and approval**

(5) Before implementing a plan or updated plan, a regulated profession shall,

(a) respond to any input from the Fairness Commissioner regarding the plan or updated plan; and

(b) if the regulations so provide, obtain the Fairness Commissioner's approval of the plan or updated plan or implement the changes to the plan or updated plan required by the Fairness Commissioner. 2024, c. 19, Sched. 3, s. 2.

**A regulated profession's policies and plans noted above shall be submitted to the Fairness Commissioner for approval no later than six months after the day section 2 of Ontario Regulation 479/24 comes into force - this equates to May 28, 2025.**

The Office of the Fairness Commissioner recently hosted a webinar to discuss the section 6(2) revision to The *Fair Access to Regulated Professions and Compulsory Trades Act, 2006*(FARPACTA) which specified that a regulated profession has a duty to work in consultation with its responsible minister: *"to ensure, as a matter of public interest, that the people of Ontario have access to adequate numbers of qualified, skilled and competent regulated professionals"*. The webinar set out OFC expectations as follows:

The OFC believes that regulated professions should be prepared to discuss:

- The supply and demand characteristics of their profession or trade(s), including the views of the regulator on whether labour market shortages are likely to arise in the short, medium or longer-term;
- How they are engaging with their boards of directors or governing councils to discuss labour market risks;
- The strategies that they are taking, or propose to take, to help understand and close the supply and demand gap, including how they plan to remove barriers and expedite the registration of qualified applicants;

- Their efforts to reach out to other stakeholders (e.g. post-secondary institutions, employers) to address these complex “ecosystem” issues in a systematic way; and
- The spheres in which they may require assistance to successfully complete these steps.

Currently, there is no data to indicate a shortage of Architects in Ontario.

The Office of the Registrar, the Policy and Government Relations Manager and the Executive Director will continue to monitor the above developments. Actions arising or required will be reviewed with the Governance Committee. Any required policy or statutory changes required will be overseen by the Governance Committee with recommendations to follow for Council review and approval.

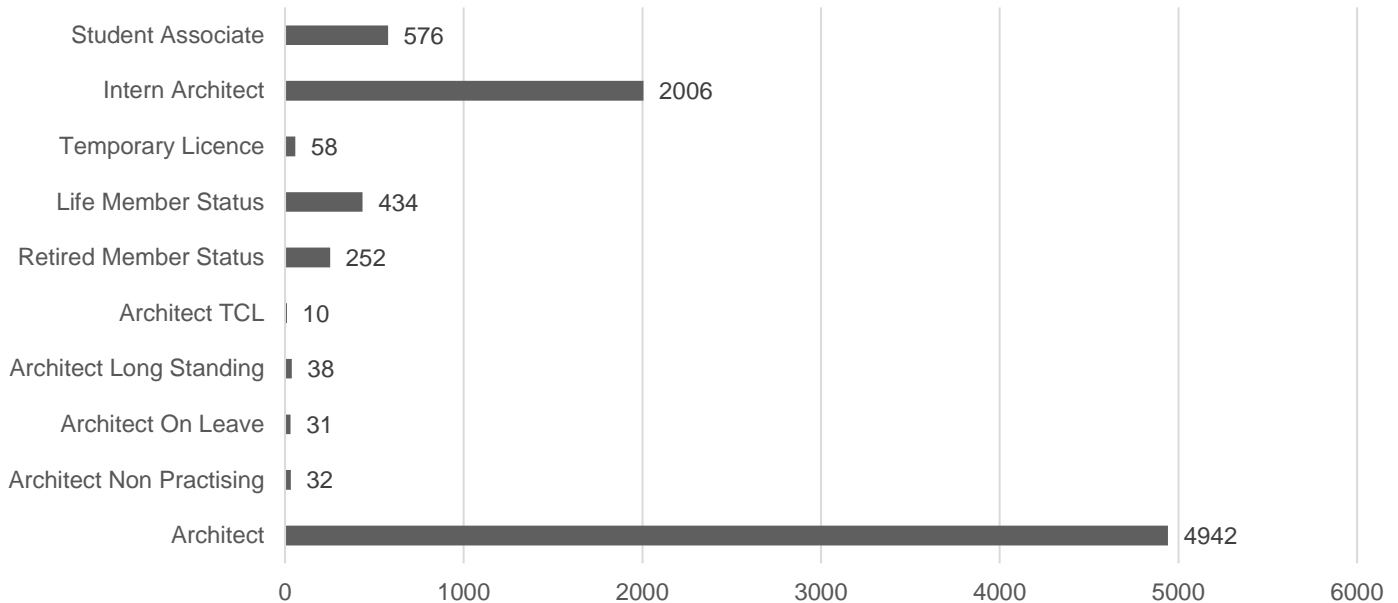
## Office of the Registrar Statistics

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Below are the OAA community statistics for 2024, indicating current records as well as changes over the year. The OAA community includes members as defined by the *Architects Act* as well as prescribed as classes of persons whose interests are related to those of the Association as defined by the regulations.

### OAA Members and Status Holders

OAA Individual Distribution as of Dec. 31, 2024



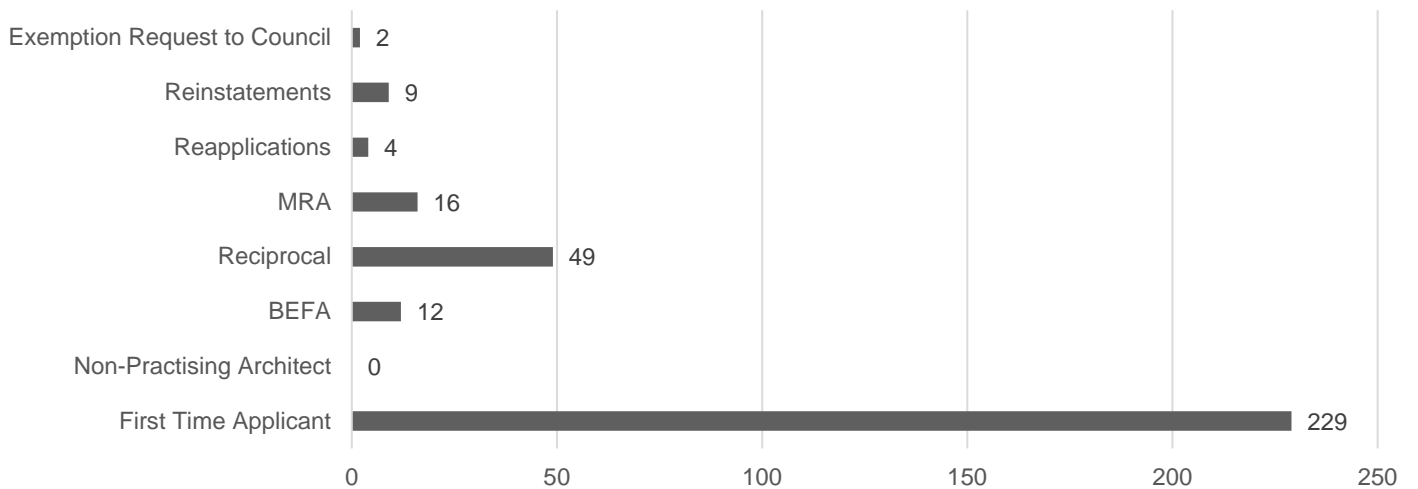
# Growth in Individual Status

Growth in Individual Status for 2024



# Licence Applications

Licence Applications for 2024

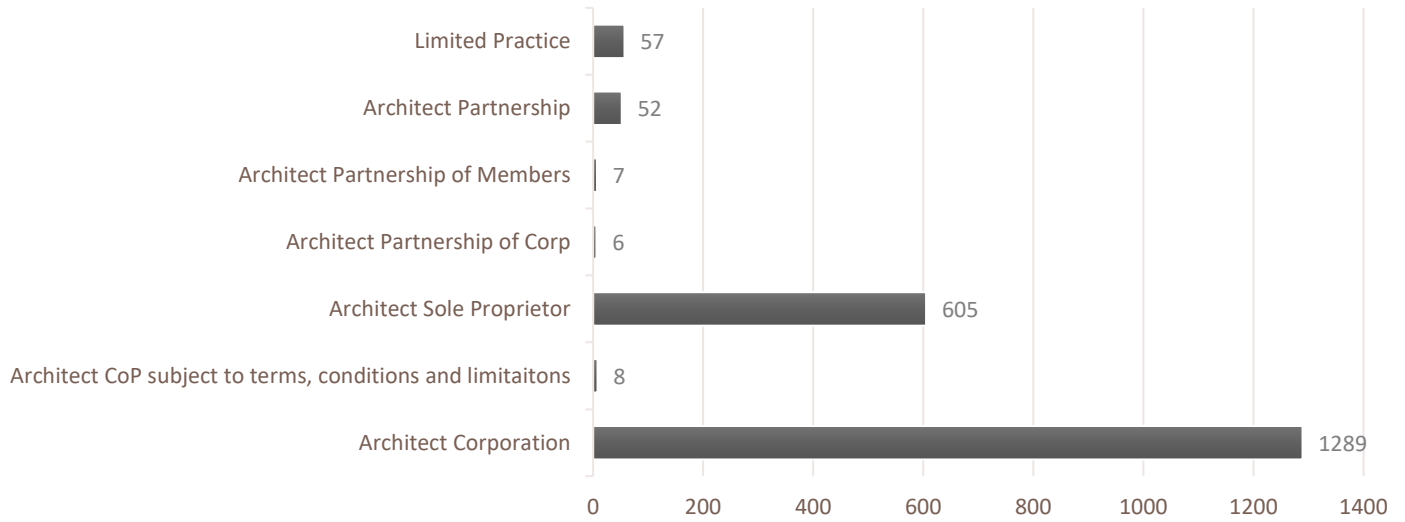


- Total licence applications received for period were 412;
- Total licence applications approved for period were 329; and
- Of the 239 First Time Applicants 83 were internationally educated applicants.



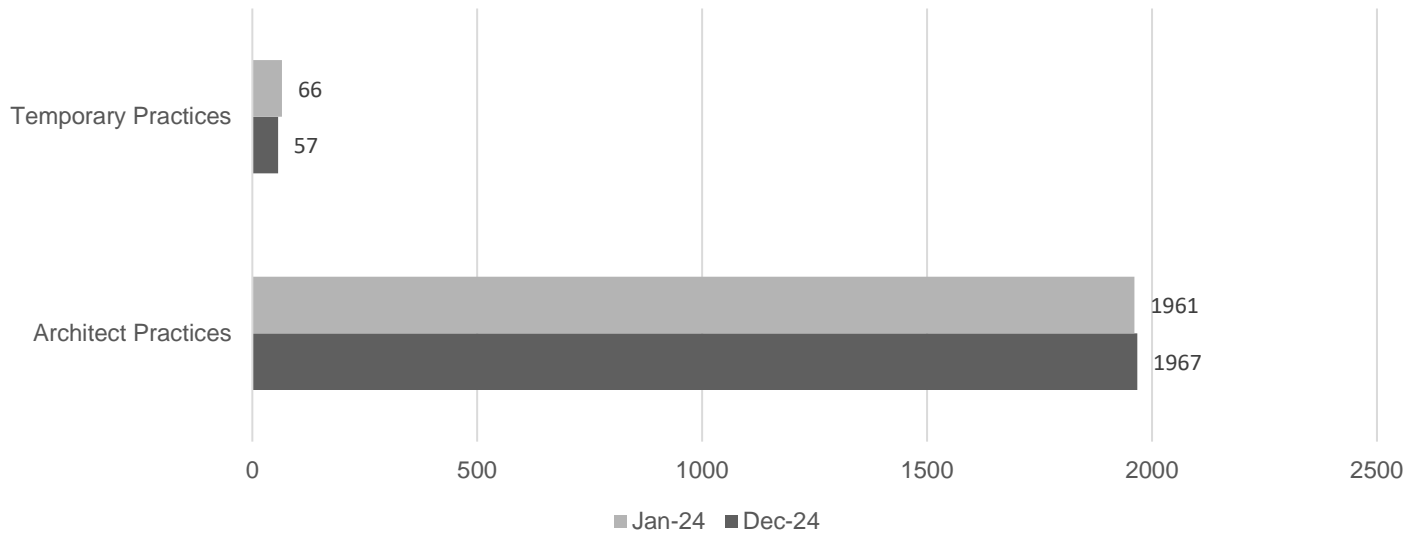
# Certificate of Practice

OAA Certificate of Practice Distribution as of Dec. 31, 2024



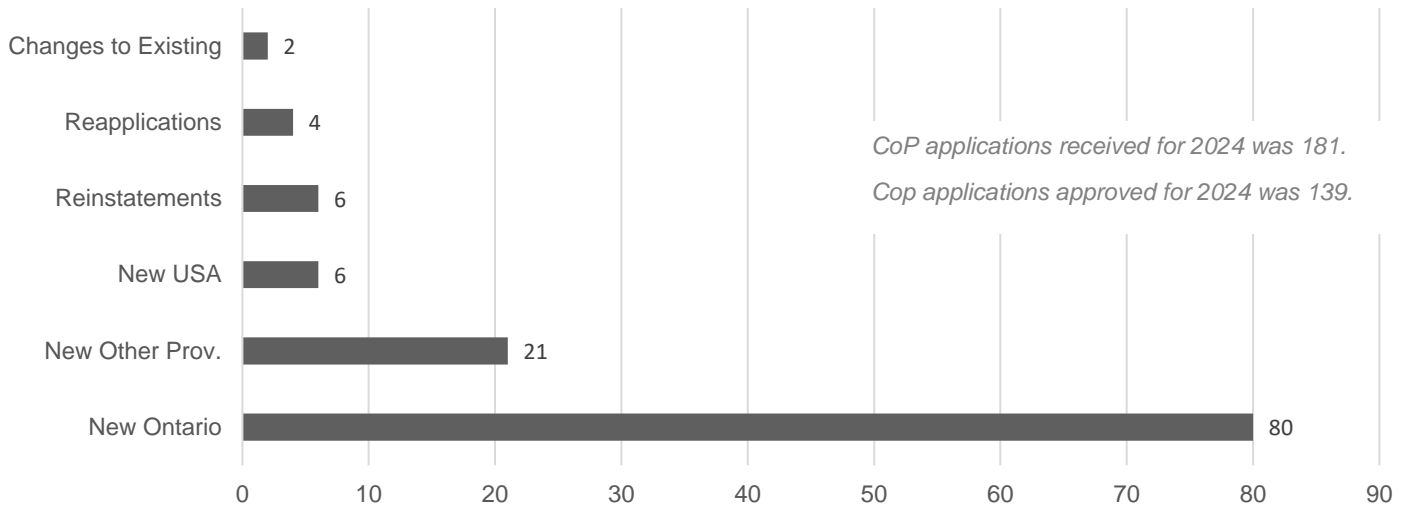
# Growth in Practices

Growth in Practices for 2024



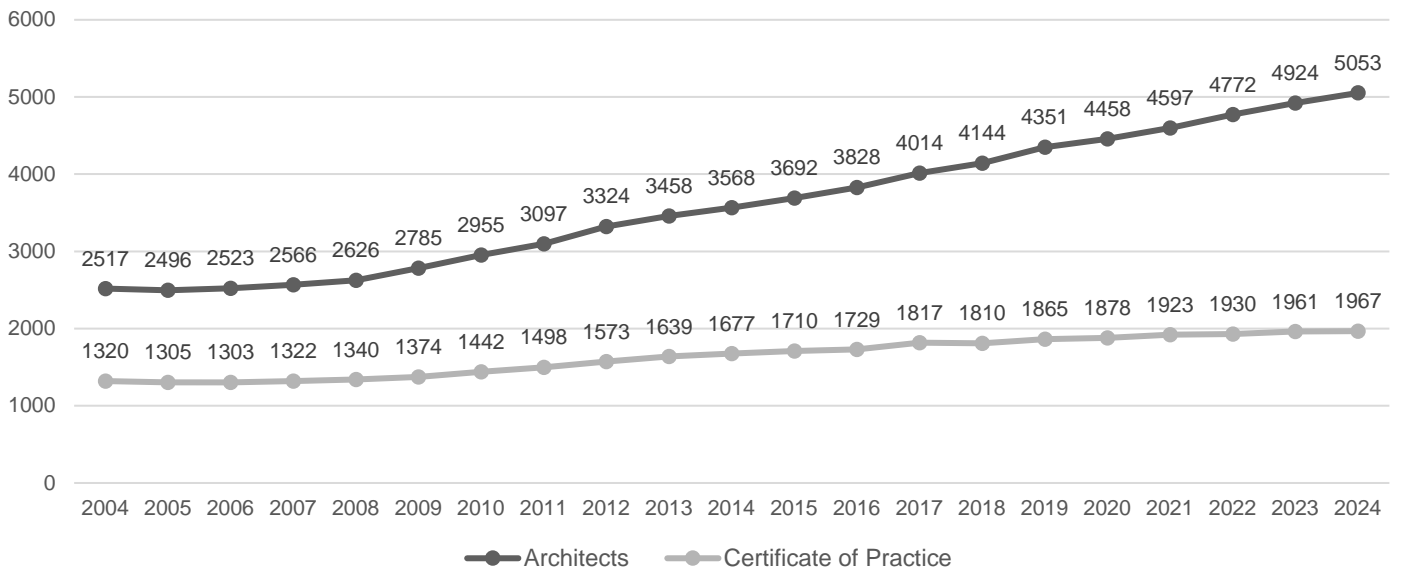
# Certificate of Practice Applications

Practice Applications for 2024



## Long Term Trends

Growth in Membership - Twenty Year Trend



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# Memorandum

**To: Council**

Settimo Vilardi  
Donald Ardiel  
Jim Butticci  
Natasha Krickhan  
Michelle Longlade  
Elaine Mintz  
Anna Richter  
Susan Spiegel  
William (Ted) Wilson  
Marek Zawadzki

Loloa Alkasawat  
J. William Birdsell  
Kimberly Fawcett-Smith  
Jenny Lafrance  
Lara McKendrick  
Deo Paquette  
Kristiana Schuhmann  
Edward (Ted) Watson  
Thomas Yeung

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.5.a

**From: Chair, Lara McKendrick**

Mariella Amodio Pearl Chan  
Kurtis Chen Jon Hobbs  
Carl Knipfel Elaine Mintz  
Brigitte Ng

**Date:** January 10, 2025

**Subject: Communications and Public Education Committee (CPEC) Update**

**Objective:** To provide an update on CPEC items and initiatives since the December Council Meeting.

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The Communications and Public Education Committee (CPEC) met virtually on Tuesday, January 7 to review the previous year's activities, reflect on the 2024 workplan, and continue discussion on improvements to the OAA Website—initially, the layout of its homepage.

In the wake of the selection of a chair (following the election of Council officers), a subsequent meeting will be planned to continue this work, as well as make decisions regarding the Special Project Funding program for Local Architectural Societies, as this has a late-January deadline.

This memo serves as a quick recap of Committee activities and beyond.

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## Review of 2024 CPEC Workplan

In order for staff to update the CPEC workplan in preparation for the 2025 Council planning session, the Committee reviewed its 2024 activities, as well as the public outreach efforts of other OAA service areas.

## Public Outreach Plan

CPEC’s actions regarding the public outreach plan (provided here as an appendix) were to review the goals and objectives as developed in concert with the Public Outreach Specialist in 2023, while also suggesting additional tactics and recommendations. This was done early in the year to set the tone for the Committee’s efforts.

Part of the Public Outreach Plan identified four main “publics” that would be critical to reach with respect to the goals set out in the five-year Strategic Plan. These publics were defined as:

- government (i.e. staff and elected officials);
- K–12 (i.e. educators and students);
- clients (i.e. building owners and procurement professionals); and
- general public (i.e. those without specialized knowledge).

Various activities by the OAA—both directly related to the work of CPEC as well as performed separately by other Association staff—are broken out in the appendix to show the intended audience. The Committee is happy about this year’s results and looks forward to building on successes for 2025.

## Conference

With Council approving CPEC’s recommendation of Larry Beasley as this year’s Virtual Keynote speaker, OAA staff reached out to the speakers’ bureau to finalize the contract. We can now confirm Beasley will indeed be the 2025 Conference Virtual Keynote Speaker; the online event will take place on Tuesday, March 18. A “save the date” notice will be shared with the OAA community in late January as part of a Conference Bulletin special email. His talk, which will also include a welcome from the new OAA president, will kick off registration for this year’s Conference, which will be held in Ottawa.

With respect to the other items listed on CPEC’s 2024 workplan related to Conference, the Committee had previously set the theme, “Reshaping Communities.” However, CPEC did *not* select a location for a 2027 event. This is due to the larger ongoing conversation regarding the future of the annual Conference. As a reminder, the location for 2026, determined in 2023, is the Waterloo region. Finalizing a recommendation for its theme will be part of the 2025 CPEC workplan, with an expected spring date.

## Awards

Early in 2024, CPEC identified a theme for the 2025 SHIFT Challenge. Following a fulsome discussion, it opted to align with the Conference theme—that is, “Reshaping Communities”—as it included the majority of the intentions of the Committee. Working with OAA staff, CPEC also helped develop the SHIFT jury long list, before meeting to create a ranked short list from which the jury (five jurors and a jury facilitator) was selected. Keeping in mind the OAA’s Strategic Plan lenses of Equity, Diversity, and Inclusion and Climate Action, a balance of diversity and expertise was sought.

The submission deadline for this biennial aspirational program was extended through the weekend from January 17 to 20. Staff will review entries to ensure compliance with eligibility and Jury Day will be held at the OAA Headquarters in February.

## K–12 Initiatives

CPEC's 2024 workplan included a focus on K–12 students and educators. Given the strategic plan's priority of "advancing the public's understanding and recognition [of] architecture [as] integral to the quality of life and well-being of our society as experienced through a sustainable, resilient, and durable built environment," connecting with young people is important. Several activities took place this year, whether through CPEC or the various service areas at the OAA. Listed in the appendix, these include:

- ongoing improvements to [Public Resources](#) and [K–12 sections](#) on the OAA Website, including tagging of events of interest to children and parents;
- Doors Open event at the OAA Headquarters: partnering with Toronto Society of Architects (TSA) on family-friending crafting event "Paper City," as well as tours and landscape design showcases;
- Ongoing production of building tour videos;
- public awareness funding for McEwen School of Architecture's Archi-North Summer Camp and Archi-North Workshops, RAW Architecture and Design Summer Camp, Urban Minds' 2024 1UP Toronto Conference and 1Up School Chapters, and John MacDonald Architect Inc.'s Kids Fun with Architecture! community festival booth;
- special project funding for Algoma Society of Architects, North Bay Society of Architects, and Northern Ontario Society of Architects' The Collab North Sponsorships, North Bay Society of Architects' Kid Kits: The Climate Change Challenge and college/university scholarships, and Windsor Region Society of Architects' United Way Windsor Essex, On Track to Success Program; and
- Council support for Winter Stations and Council support for No. 9's Imagining My Sustainable Communities.

After a discussion with TSA staff and the OAA Executive Director, it was decided that a tentatively proposed second "big think" among educators was not necessary at this time. Instead, the Association would continue to amplify and platform existing groups in the architecture educational space. This is done via social media and website sharing and through CPEC's decision-making when it comes to Public Awareness Funding and Special Project Funding for the Local Architectural Societies.

Earlier in the year, the Committee agreed to a one-year trial run of working with ChatterHigh (a provider of career guidance resources for high schools). In 2025, reviewing how the program has performed thus far will help determine next steps.

## OAA Public Awareness Funding Program

The Committee reviewed the semi-annual funding applications, allocating funds using the established criteria. A brief roundup was published on the [OAA Website](#).

In addition, the Committee offered suggestions for administrative and fairness improvements to the program (including a name change from “Sponsorship” to “Funding” for clarity of purpose). The updates were shared with Council in the [September 2024 Council meeting memo](#) and are now in effect.

## Society Special Project Funding

Twice in 2024, CPEC reviewed submissions from Local Architectural Societies, making their decisions. The results are listed on the [OAA Website](#). No other changes were proposed for the program given there are other ongoing discussions between the Societies and the OAA with respect to operations and funding.

Both the Public and Society funding continue to be successful, and there are more funding requests than CPEC has money to give. The Committee will be reviewing the past few years of this program with an eye to the future.

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## OAA Website

As a prelude to more in-depth work in 2025 to improve the OAA Website’s user experience (especially with respect to searching and organization), CPEC had previously discussed with OAA staff whether there were opportunities to update and refresh the main homepage for OAA.on.ca. This is important as the look of the homepage will set the tone for the rest of the website with respect to design and content.

Questions posed by the Committee included:

- Can more information be provided at a glance?
- How do we reduce the number of clicks or amount of scrolling to get where one needs to go?
- How can we use colour or other wayfinding to ease navigation?
- How do we provide immediate regulatory information to both public and member audiences?
- How can we ensure people find what they need?
- What is the role of an effective landing home page and, on a bigger level, what is the role of the OAA Website?
- How can we make sure users understand whether they are on the public-facing or member-facing site?

Cited concerns involved the current layout overemphasizing a project photo and too much whitespace at the expense of pertinent, time-sensitive information that may be lost to those who do not know they are expected to scroll down. Too many clicks to get where one needs to go.

A series of homepage mock-ups were done by staff—some use the current website’s “toolbox,” while others were more aspirational but still doable. Together with staff, the committee reviewed and discussed the various mock-ups and they are now with committee members for further consideration. This work will carry forward into 2025.

---

**Action**

None. For information only.

---

**Attachments**

Public Outreach plan with Audiences Chart


# Public Outreach Plan

*This Public Outreach Plan responds to the goals outlined under the OAA five-year Strategic Plan’s Public Education priority. Its primary aim is to advance the public’s understanding and recognition that architecture is integral to the quality of life and well-being of our society as experienced through a sustainable, resilient, and durable built environment.*

## STRATEGIC GOALS





- Develop and implement an **outreach strategy** to educate the public about the role of architecture in creating the built environment and its impact on society
- Foster a **greater understanding of the OAA** as a unique professional self-regulator
- **Leverage and support programs and services** offered by other stakeholders
- Continue education regarding **best practices in project delivery** that relate to regulatory responsibilities of OAA members and practices, inclusive of procurement





## OBJECTIVES

- ◆ Increase followers and engagement
- ◆ Increase participation in OAA programs
- ◆ Improve knowledge, understanding, and appreciation of architecture
- ◆ Earn greater expressions of trust and positive professional relationships
- ◆ Expand industry influence
- ◆ Change attitudes about the OAA / the profession

 <p><b>AMPLIFY</b> current initiatives rather than starting from scratch</p>	 <p><b>LEVERAGE</b> partnerships to create a greater whole</p>	 <p><b>PIGGYBACK</b> on successful projects to benefit from existing work</p>	 <p><b>EVALUATE</b> new ideas and initiatives judiciously</p>
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# KEY AUDIENCES



**GOVERNMENT**  
staff and elected officials



**K-12**  
educators and students



**CLIENTS**  
building owners and procurement professionals



**GENERAL PUBLIC**  
those without specialized knowledge

Queen's Park Picks event/website (and related meetings): MPPs and provincial staff	Improvements to K-12 section on OAA Website (ongoing)	Procurement Day in April with CDAO	People's Choice Award voting on LinkedIn, Instagram
Building officials: OBOA Journal articles on site plan assessment, building code transition	Doors Open event: Paper City with TSA, tours, landscape design	Refreshing of contracts suite on OAA Website, webinars	Doors Open event: tours, landscape design
Municipal: Procurement Day in April with CDAO	Production of building tour videos	Ads in <i>AZURE Magazine</i> and <i>Ontario Design</i> sourcebook	Queen's Park Picks, Design Excellence, SummerSketches on Instagram
Numerous provincial and federal consultations related to codes and legislation (in which the OAA offers not only design-related input, but also has an opportunity to speak to overall strategic plan themes)	Public awareness funding: <ul style="list-style-type: none"> <li>- McEwen School of Architecture's Archi-North Summer Camp and Archi-North Workshops;</li> <li>- RAW Architecture and Design Summer Camp, "Diversity in Design;"</li> <li>- Urban Minds' 2024 1UP Toronto Conference and 1Up School Chapters</li> <li>- John MacDonald Architect Inc.'s Kids Fun with Architecture! community festival and event booth</li> </ul>	Messaging on importance of design competitions via podcasts, etc	Landscape Design: in-person event, online galleries
Public awareness funding: <ul style="list-style-type: none"> <li>- Actual Media's Brownie Awards</li> </ul>		Production of building tour videos	Inclusion of learning sessions on YouTube
Society project funding: <ul style="list-style-type: none"> <li>- Hamilton &amp; Burlington Society of Architects (HBSA) Sub-Committee formation and Workshop for Municipal Rental Housing Bylaws</li> </ul>		Improvements to OAA Directory on the website	Promotion of public-facing third-party events and news articles on socials, website, and e-newsletter
		Public awareness funding: <ul style="list-style-type: none"> <li>- Actual Media's Brownie Awards;</li> </ul>	Maps contest on Instagram
		PAS hotline and other resources for clients	Six new episodes of the podcast: accessibility, Conference roundtable on long-term care, zoo design, transit-oriented communities, design competitions, waterfronts

			Production of building tour videos
			Creation of Design Excellence publication, ongoing media relations re: award-winners
	<p>Society project funding:</p> <ul style="list-style-type: none"> <li>- Algoma Society of Architects, North Bay Society of Architects, and Northern Ontario Society of Architects for The Collab North Sponsorships;</li> <li>- North Bay Society of Architects for Kid Kits: The Climate Change Challenge;</li> <li>- North Bay Society of Architects for College and university scholarships; and</li> <li>- The Windsor Region Society of Architects for United Way Windsor Essex, On Track to Success Program 2024</li> </ul>		<p>Public awareness funding:</p> <ul style="list-style-type: none"> <li>- Architectural Conservancy of Ontario Hamilton Region's Doors Open Hamilton;</li> <li>- Heritage Ottawa's 2024 Walking Tour Season;</li> <li>- Muslims in Public Spaces' Paradise City: Islamic Gardens;</li> <li>- Social Sciences and Humanities Research Council of Canada (SSHRC)'s Quality in Canada's Built Environment Roadmaps to Equity, Social Value, and Environmental Sustainability: Living Atlas of Quality;</li> <li>- TimberFever Design Build Competition;</li> <li>- Ottawa Architecture Foundation (OAF)'s architectural and bike tours; and</li> <li>- Canadian Architecture Students Association (CASA)'s Canadian Architectural Forums on Education (CAFÉ): The Right to Equal and Accessible Housing;</li> </ul>
	Council support for Winter Stations		<p>Society project funding:</p> <ul style="list-style-type: none"> <li>- St. Lawrence Valley Society of Architects for Local Legacies: An Audio Chronicle of Architectural Practices within the Saint Lawrence Valley and Urban Sketching-Kington: 2x urban</li> </ul>
	Council support for No. 9's Imagining My Sustainable Communities		

			<ul style="list-style-type: none"> <li>- sketching classes;</li> <li>- Toronto Society of Architects (TSA) for Sharing our Work on Toronto's Queer Spaces, Architecture Minutes short video series, and Walking Tours</li> <li>- Windsor Region Society of Architects for Windsor Public Library Education Initiative 2024, Architecture/Cultural History Public Lecture, social media, Bike Windsor Essex, Better Cities Film Festival, and Windsor Film Festival</li> <li>- Northern Ontario Society of Architects for BEA(North) Talks;</li> <li>- London Society of Architects for Nuit Blanche London and Design Excellence Panel</li> <li>- Hamilton Burlington Society of Architects for Art Gallery of Hamilton Arts Festival Sponsorship Event &amp; Panel Discussion</li> </ul>
			<p>Council support for Winter Stations</p>
			<p>Council support for TEUI calculators</p>
			<p>Updates and adjustments to the Public Awareness Funding program for 2025</p>

## KEY MESSAGES

*“Architecture is integral to the quality of life and well-being of our society as experienced through a sustainable, resilient, and durable built environment.”*

*“The OAA is a professional self-regulator; regulators exist to protect the public.”*

*“Architects are licensed professionals who bring exceptional value to design and construction projects. Working with all such professionals requires entering into fair and balanced business relationships.”*

*“The OAA is invested in programs and activities that foster diversity in its membership, now and in the future.”*

# Memorandum

**To: Council**

Settimo Vilardi	Loloa Alkasawat
J. William Birdsell	Donald Ardiel
Kimberly Fawcett-Smith	Jim Butticci
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Speigel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.5.b

**From:** Governance and HR Committee

William (Ted) Wilson (Chair)	Settimo Vilardi
Susan Speigel	Michelle Longlade
Elaine Mintz	

**Date:** January 13, 2025

**Subject:** Update from OAA Governance Committee

**Objective:** To provide Council with an update regarding recent activities of the Governance Committee.

---

The Governance Committee met on January 13, 2025. The following priority agenda items were covered.

## Annual Planning Session

The agenda, speakers, and pre-reading material for the Annual Planning Session were reviewed and approved. It was agreed that the draft agenda and pre-reading material would be circulated to the Council a week in advance of the session. The Committee also reviewed the proposed group exercise worksheet that would be used to guide the discussions during the planning session. It was noted that the various presentations would be led by members of the OAA management team and the President and that the Immediate Past President would also play a role in facilitation.

**Ontario Association of Landscape Architects (OALA) status re. their pursuit of practice legislation**

It is noted that the OALA has recently recontacted the OAA President and Executive Director regarding their pursuit of practice legislation. This will continue to be monitored. The President & Executive Director will be meeting with their counterparts in the coming days.

### **Discussion re. Society Finances and Governance**

As a result of ongoing discussions amongst the local society chairs and the Finance & Audit Committee, the Governance Committee has been asked to consider specific questions around the per capita funding for the societies, as well as the financial funding framework. Doyle presented background information and data to guide the discussion. The Committee will continue to discuss this at its next meeting.

### **Committee Appointments**

The Governance Committee conducted a review of the Council Appointments to OAA Committees for 2025 as per their mandate. However, Committee Appointments will only be finalized after the Election of Officers at the January Council meeting.

### **Review of the number of Council Meetings per year**

The number of Council meetings per year was reviewed and confirmed to stay the same.

### **Workforce Planning and HR Updates**

The management team continues to be given opportunities to increase their leadership skills for a sustainable staff structure. For example, all managers will be given an opportunity to speak on their accomplishments and goals during the annual planning session.

### **Act Modernization**

Act Modernization will continue into 2025, and it will be a multi-year process.

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### **Action**

None. For information only.

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### **Attachments**

None



FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.5.c

January 14, 2025

Memo re: **OAA HQ Landscape Revitalization - Progress Report 2**  
To: Members of OAA Council plus OAA Staff Team  
From: Joe Lobko

The following report is intended to provide members of the OAA Governing Council with an update of progress on the design and implementation of the Landscape Revitalization project for the 111 Moatfield Drive headquarters site.

This is **Progress Report 2**, following upon an initial report provided for the early December meeting. That December report provided members of Council with an update of design progress in response to feedback received thus far.

This report will focus upon the following:

- 1 Overview of Process
- 2 Progress of Engagement of Construction Manager/General Contractor
- 3 Approvals
- 4 Next Steps - C of A, Construction Budget, Scope of Work Review, Updated Schedule

### **1 Overview of Process**

The previous report summarized the substantial progress made on the schematic design evolution of the competition winning submission. That progress included an amended approach to pedestrian access, separation of pedestrian and vehicular access, interpretative elements, storm water management, planting strategy as well as evolving thoughts about the main door and arrival pavillion at grade.

While that work has been underway, we have also undertaken a procurement process to engage a construction manager/contractor to implement the project as well further engagement with City of Toronto planning and building departments, with updates on those topics found below.

### **2 Progress of Engagement of Construction Manager/General Contractor**

Subsequent to an invited RFP process and interviews with all three invited companies, Somerville Contruction was selected as the preferred proponent in the request for proposal process undertaken in the latter part of 2024. The process of formally engaging Somerville to undertake the work is underway.

### **3 Approvals - Engagement with City of Toronto Staff**

We have received confirmation from City of Toronto Building Department staff through a ZAP application process that two minor planning variances will be required to implement the project as follows:



## **1 Parking**

Subsequent to the construction of the new OAA HQ building, the North York Council (in the mid 1990s) approved a requirement to increase the amount of parking required for this general zoning category. That higher parking requirement did not arise as an issue during the building revitalization project because the existing parking arrangements at that time were not proposed to change. At a time when staff parking demand was higher additional parking (4 spaces) had been added by eliminating the original looped driveway arrangement, thereby increasing parking availability but resulting in two dead end circulation arrangements. The design competition brief included the requirement to revert to the original arrangement allowing for the safer and more practical looped drive arrangement to be put back in place. This variance is supportable given the history, current parking demand, and evolving city policy with respect to mandatory parking requirements.

## **2 Porous Driveway Material**

The historic North York Zoning By-Law requires that all entry driveways be made of a non-porous surface material - e.g. concrete, asphalt. This is in contradiction to newer city policy/regulation encouraging/requiring the management of storm water containment on site through the use of infiltration and other measures.

The winning competition submission is based upon the idea of a porous surface entry bridge allowing for the development of interconnected bio-retention ponds on the lowest areas of the site, adjacent to and under the entry bridge. Hence this variance requirement, supportable given the positive feedback received by city staff during our pre-application meeting. This approach to storm water management on site can serve as a positive example of how property owners can modify their site conditions to better manage storm water on site, while also renaturalizing the landscape to reflect the immediate watershed context.

## **Site Plan Approval Not Required - Approval Process**

We have received confirmation that this revitalization does not constitute 'development' and that therefore a Site Plan Approval application process will not be required. We will require a TRCA Permit approval given our proximity to the Don Valley Watershed, as well as building permits to construct the entry bridge and amend the existing storm water discharge system.

## **4 Next Steps**

- Completion of Contract arrangements with Somerville Construction.
- Application to City of Toronto Committee of Adjustment for two minor variances as noted above.
- Work with the Design and Construction Management team to balance scope of work ambitions with the budget parameters identified. Consider feedback from subtrades.
- Subsequent to the engagement of Somerville Construction, and with the help of the design team and OAA staff team, identify a recommended strategy (or alternative strategies) to reconcile project ambition with available budget. To be presented to the March 6 meeting of the OAA Council.

End of Memo.



# Memorandum

**To: Council**

Settimo Vilardi	Loloa Alkasawat
J. William Birdsell	Donald Ardiel
Kimberly Fawcett-Smith	Jim Butticci
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FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 6.5.d

**From:** Kristiana Schuhmann, Vice President & PRC Chair

**Date:** January 13, 2025

**Subject:** Practice Resource Committee (PRC) - Update.

**Objective:** To update Council on Practice Resource Committee (PRC) activities.

## Activities Report – Practice Resource Committee (PRC)

As a follow-up to the Practice Resource Committee December 2024 Activities Report, here are a some project updates:

### Document Development and Maintenance

PT.03 Building Code Data Matrix, PT.35 & other resources impacted by the new OBC:

- As per the 2024 Work Plan for the committee, PRC was tasked to support PAS with a review of the code matrices and code updates. The following are now available on the website:
  - [Practice Tip PT.03 Building Code Data Matrices](#)
  - [Practice Tip PT.35 OBC Importance Category and Seismic Restraint](#)
- The membership was informed of these updates via OAA News (Jan. 9, 2025) and further reminders are expected in the upcoming weeks via social media and the next edition of the [Practice Advisory Newsletter](#).
- Refer to the December 2024 memo entitled “*OAA Document Maintenance - Practice Tips Impacted by OBC 2024*” for additional background on the project.

Minor Updates to [Practice Tip PT. 23.6 Design-Build: CCDC 14-2013](#) and [PT. 23.7 Design-Build: CCDC 15-2013](#):

- Following the launch of [PT.25 Design Build: Using OAA 600-2021](#), localised maintenance of these Practice Tips were slotted for update.
- Refer to January 2025 Council Memo entitled “*Minor Updates to Practice Tip PT. 23.6 Design-Build: CCDC 14-2013 and PT. 23.7 Design-Build: CCDC 15-2013*” for more details.

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**Action**

None. For information only.

---

**Attachments**

None

# Memorandum

**To: Council**

Settimo Vilardi  
 Donald Ardiel  
 Jim Butticci  
 Natasha Krickhan  
 Michelle Longlade  
 Elaine Mintz  
 Anna Richter  
 Susan Spiegel  
 William (Ted) Wilson  
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 Deo Paquette  
 Kristiana Schuhmann  
 Edward (Ted) Watson  
 Thomas Yeung

FOR COUNCIL MEETING  
 January 23, 2025  
 (open)  
 ITEM: 6.5.e

**From:** Susan Spiegel, Chair, Policy Advisory Coordination Team (PACT)

Len Abelman  
 James Eduful  
 Cory Stechyshyn  
 Ted Watson

Toon Dreessen  
 Ibrahim El-Hajj  
 John Stephenson

**Date:** January 9, 2025

**Subject:** Update on the Policy Advisory Coordination Team's (PACT) work.

**Objective:** To update Council on PACT's ongoing work.

---

PACT last met on December 4, 2024 for their final meeting of the year.

At its most recent meeting, PACT began developing its work plan for 2025. The Committee is keen to arrange a Big Think on emerging issues, such as single egress in small apartment buildings or the expansion of encapsulated mass timber construction. The committee will continue to take part in government consultations as they arise. PACT thanked outgoing members for their contributions and another successful year.

- **Altus Reports:** Further to Council's approval to fund an updated study that quantifies the impact of province-wide site plan delays and that analyzes the economic impact of the architecture industry in Ontario, Altus has delivered both reports in final draft form.

The draft reports were received by PACT on December 20 and represent a major achievement in regard to the Committee's work plan for 2024. Plans are under way for PACT to develop and advance recommendations to Council about strategic ways to share the findings of the reports to government and other key stakeholders, as well as the public.

Final drafts of the updated reports are attached for information.

- **Note from Chair:**

As this is my last Council Memo as VP Chair of PACT I wanted to take this moment to thank both of the attentive and fabulous staff of PACT, Sara Trotta, Manager of Policy and Government Relations and Elizabeth Walsh, Policy Analyst.

I have been Chair of PACT long enough to see Sara take the reigns of this important role and to bring very crisp insightful thought and responses to urgent issues. Elizabeth Walsh was hired and has proved herself a worthy addition to the team as a diligent researcher and experienced policy analyst.

To the Members on our committee, we have had the benefit of 2 past presidents (3 including myself) for 8 years. Although we are lucky to have Toon Dreessen for another year, John Stephenson will no longer be bringing his wisdom and long view on a regular basis, but we look forward to having him as an SME and contributing his intellectual assistance to our Big Thinks.

Len Abelman has been a valued and dedicated member, especially as our unofficial Large Firm Representative on PACT. We have counted on his point of view on many issues that impact large and small firms differently. He has contributed his ability to see forward towards unintended consequences. We hope Len will rejoin the committee one day!!!

Thank you to our Intern this year, James Eduful. We very much appreciated his dedication and attendance, which is often so difficult to coordinate as an intern.

We welcome 2 new members to refresh our points of view, Sara Jordao and Mary Ellen Lynch. I look forward to wrapping up our past years of great work at our Planning Session in late January and helping with the draft workplan and schedule for the reconfigured committee.

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**Action**

None. For information only.

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**Attachments**

Altus Report - Cost of Site Plan Delay

Altus Report – Economic Benefits of Architecture Industry

# **Cost of Site Plan Delays**

## **A Report for the Ontario Association of Architects**



# **Cost of Site Plan Delays**

## **A Report for the Ontario Association of Architects**

Prepared for:

**Ontario Association of Architects**

Prepared by:

**Altus Group Economic Consulting**

33 Yonge Street Toronto Ontario M5E 1G4

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[altusgroup.com](http://altusgroup.com)

December 19, 2024

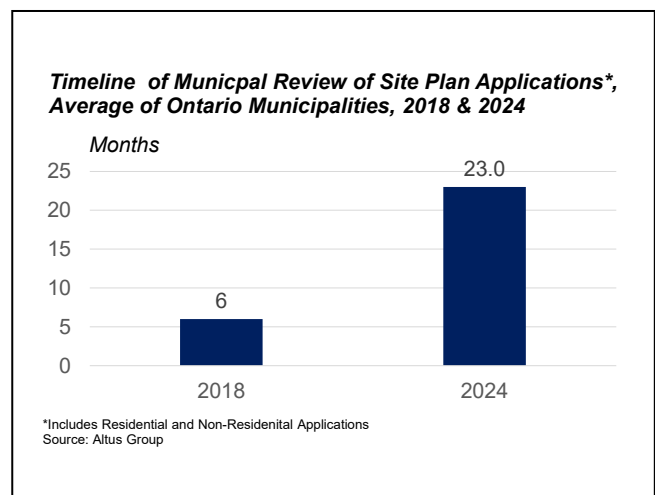
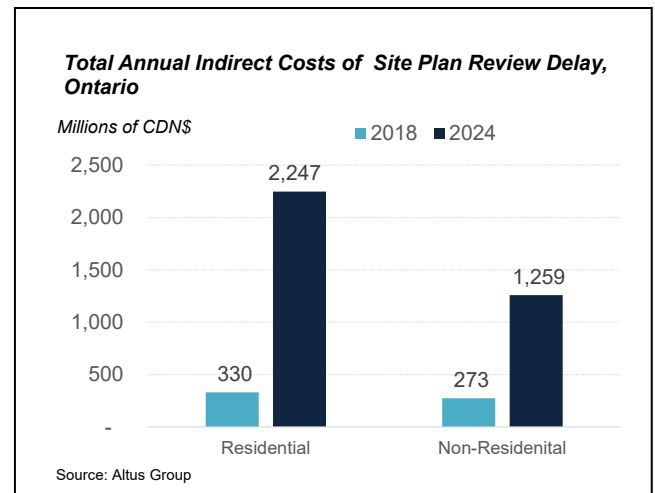
## Key Findings

This is the third edition of a series of reports commissioned by the Ontario Association of Architects, to highlight the economic costs of a lengthy site plan application process in Ontario. The first edition was published by Bousfields and Altus Group in 2013, with the second report released in 2018 by Altus Group.

The analysis found in these reports aims to capture the indirect monthly and annual costs associated with the site plan approval process in Ontario and how those costs have changed over time. These costs include both lost economic activity that would have occurred had developments been built in a more timely manner and the additional costs borne by municipalities, landowners and developers, the general economy and final users such as homeowners and office tenants during this time.

The findings of this report include:

- **The delay in site plan application review costs the Ontario economy roughly \$3.5 billion dollars a year, up from an estimated \$300-\$900 million a year in 2018.**
- The cost of site plan delays is equivalent to the investment needed to build an additional 7,200 residential units per year and 3.7 million sq. ft. of non-residential space.
- It is estimated that it takes a municipality an average of 23 months to review a site plan application in Ontario, up from 6 months at the time of the 2018 edition of this Study.
- During that time, an example development of a 100-unit apartment building will accumulate \$5.8 million in economic costs, while a non-residential development will amass \$2.9 million in economic costs.



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## INTRODUCTION

Before a new development can gain construction approvals in Ontario, it must go through a development application process. There are five types of major approvals needed in Ontario for new developments and an application may require multiple of them. In recent years, the time to review a single application has ballooned. A development requiring multiple applications can be in the approval (or rejection) process for years.

Site plan application is one of the five approvals needed before an application can proceed to the building permit stage. A site plan review is a technical process that deals with matters relating to building layout, massing, access, parking and landscaping, to ensure development proceeds in a safe, efficient and aesthetically pleasing manner.

The Ontario government legislates that municipalities should review a site plan application within 60 days (two months). However, a site plan approval can take close to two years from submission to decision.

This is the third edition of a series of reports commissioned by the Ontario Association of Architects, to highlight the economic costs of a lengthy site plan application process in Ontario. The first edition was published by Bousfields and Altus Group in 2013, with the second report released in 2018 by Altus Group.

The analysis in this report evaluates the indirect monthly and annual costs associated with the site plan approval process in Ontario and how those costs have changed over time. These costs include both lost economic activity that would have occurred had developments been built sooner and the additional carrying costs accrued by the landowner/developer during this time.

***It is estimated that the total economic cost of the site plan application process is \$3.5 billion per year, up from \$300-\$900 million estimated in 2018.***

The remainder of this report lays out how Altus Group reached this estimate, and how underlying inputs to the model have evolved since the time of the last edition in 2018.

### Report Caveat

This analysis has been prepared on the basis of the information and assumptions set forth in the text. However, it is not possible to fully document all factors or account for all the changes that may occur in the future.

This report relies on information from a variety of secondary sources. While every effort is made to ensure the accuracy of the data, we cannot guarantee the complete accuracy of the information used in this report from these secondary sources.

This report has been prepared solely for the purposes outlined herein and is not to be relied upon or used for any other purposes or by any other party without the prior written authorization of Altus Group Limited.

# TOTAL TIME IT TAKES TO GET A SITE PLAN APPROVAL

Section 41 of the *Planning Act, R.S.O. 1990*, sets out the regulatory framework for site plan review and provides municipalities with the power to approve development applications within site plan control areas.

Site plan review is a technical process that deals with approval matters relating to building layout, massing, access, parking and landscaping, to ensure development proceeds in a safe, efficient and aesthetically pleasing manner.

In Ontario, most developments with over 11 units require a site plan application.

A site plan application will be submitted to a municipality at two points:

- First, as a preliminary application, requiring municipal feedback on how an application can be made ready for a review. This is called a pre-application consultation (PAC).
- Second, as a complete application submitted to a municipality, in which the applicant has provided all the information required by the municipality before it will start reviewing it.

To estimate the length of time it takes for a municipality to review a site plan application, this study undertook a survey of OAA members and recent development submissions. Survey participants were asked the date of which an application was submitted and the date for which a decision was issued. The survey resulted in 31 responses on application timelines, most of which were for non-residential and mixed-use developments.

**Figure 1: Estimated Length of Site Plan Approval Process, Survey Results**

	Survey Results	
	Respondents/ Applications	Average Reported Months
Residential	4	16.1
Mixed-Use	19	27.8
Combined Residential/Mixed Use	23	23.1
Non-Residential	8	34.6

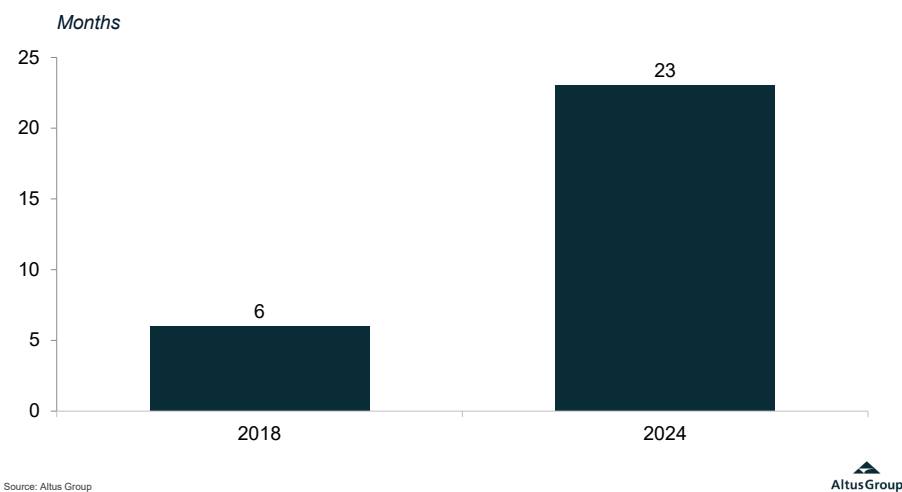
Source: Altus Group and OAA

The average reported timeline was 23 months for residential and mixed-use projects and 35 months for non-residential developments.

While there was a small survey response, the results were weighed against the timeline found in the BILD GTA Municipal Benchmarking Report results and the CHBA Canada-Wide Municipal Benchmarking Report<sup>1</sup> results. Both these reports provide data on the length of time it takes to review site plan applications in some of Ontario's major municipalities. The results in these reports show that a site plan application can take between 18 and 23 months to review, not including the pre-consultation period. Note, there are more municipalities covered in this report than in the Benchmarking Reports.

This study uses 23 months as the average length of time it takes to review a site plan application, as it represents a conservative estimate on timelines.

**Figure 2: Length of Site Plan Approval Process, Ontario Municipalities, 2018-2024**



For the purposes of this report, a site plan review delay is defined as the months of review in excess of a reasonable length of time. Through legislation, the Province of Ontario has deemed that reasonable length of time to review a site plan application is 60 days (2 month)<sup>2</sup>. Therefore, of the 23 months it takes to review a site plan application, 21 of those months are considered a delay.

<sup>1</sup> BILD GTA Municipal Benchmarking Report and CHBA Canadian Municipal Benchmarking, Edition 2024 and 2025.

<sup>2</sup> Planning Act Section 41 (12) states that “ If the municipality fails to approve the plans or drawings referred to in subsection (4) within 60 days after they are received by the municipality, the owner may appeal the failure to approve the plans or drawings to the Tribunal”

## MONTHLY COSTS OF SITE PLAN DELAY

This section provides an outline of what is included in the cost of site plan delay estimate. For the purposes of this report, costs were modelled on two example developments, including the following assumptions:

### ***Residential Development***

- 100-units apartment building;
- Built on 1 acre of land. The vacant land is assumed to be assessed at \$3.0 million per acre (based on 2016 assessment values<sup>3</sup>);
- A construction value of \$31.5 million at the start of the application process; and
- An expected average selling price of \$611,000 per apartment at the start of the application process and a 2016 assessment value of 321,000.

### ***Non-Residential Land***

- 50,000 sq. ft. of office space;
- Built on 1 acre of land. The vacant land is assumed to be assessed at 2016 values of \$574,000 per acre;
- A construction value of \$16.9 million at the start of the application process; and
- An expected average valuation of \$189 per sq. ft for office space at the start of the application process.

Every additional month a development application sits in the site plan review process represents a delay in the time the development would reach completion and come to market. These delays have the following costs:

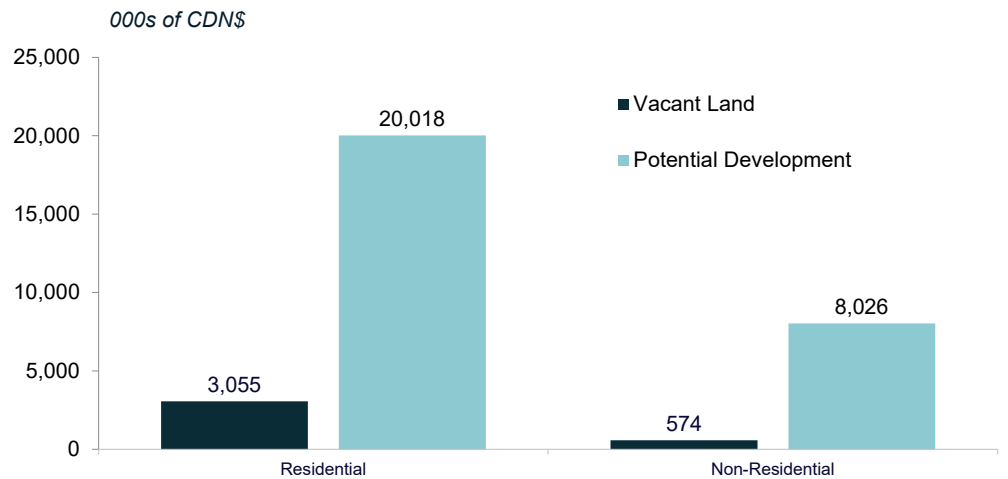
### ***COSTS BORNE BY MUNICIPALITIES***

The largest cost to a municipality is lost property tax revenue. While a development application is working its way through the review process, the underlying land will either remain vacant, or underutilized.

In the example residential development, the assessment value of the vacant land would be \$3.0 million, while a 100-unit apartment building would result in a \$20 million assessment value.

<sup>3</sup> Property taxes are calculated on 2016 assessment values in Ontario.

**Figure 3: Property Assessment Values, Average, Ontario Municipalities, as of 2024 based on 2016 Assessment Values**



Source: Altus Group, based on Altus Data Suite and CREA Home Price Index



Municipalities, on average, would earn an additional **\$21,300** per month in tax revenues, if the land were developed sooner.

In the example non-residential development, the assessment value of the vacant land would be \$574,000, while a 50,000 sq. ft. office building would result in a \$8.0 million assessment value. Municipalities, on average, would earn an additional **\$24,000** per month in tax revenues, if the land were developed.

The full calculation can be found in Appendix Figures A1 and A2.

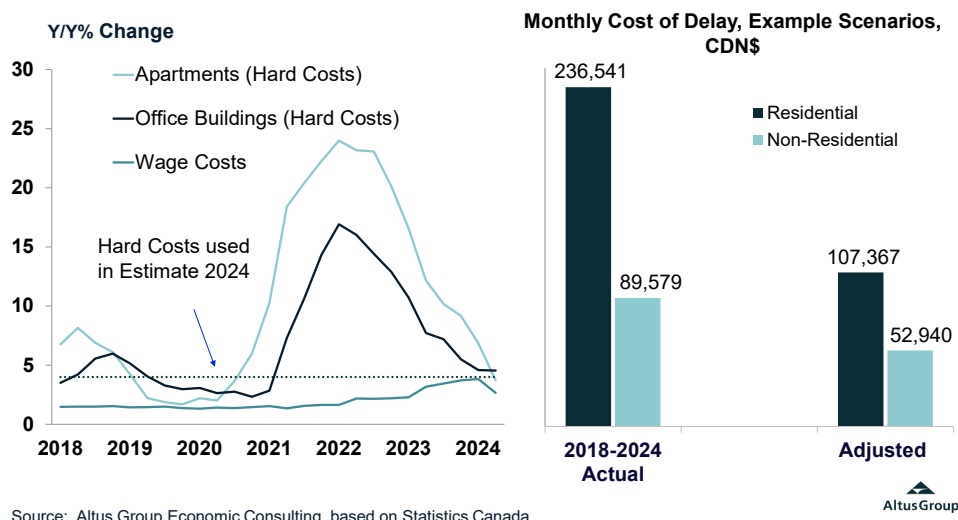
### ***COSTS BORNE BY LANDOWNERS, HOMEBUILDERS, DEVELOPERS (THE APPLICANTS)***

For applicants, each additional month spent in the site plan review process pushes back the time that the landowner can turn over the building or units to the eventual owner(s). While an application is going through the review process, the land is sitting vacant, or underutilized, resulting in carrying costs. When a development is in the site plan review process the costs associated with the construction of the building can increase. This includes the costs of both materials and labour.

For a residential development, these costs include:

- \$4,400 in additional property taxes paid each month the applicant must hold the land. By the time the development reaches the site plan review process, the land would be assessed at its highest and best use;
- \$14,700 in opportunity/financing costs per month. The land represents an upfront investment that will either be financed, or potentially sold. Interest rates on mortgage loans have gone up by 300 basis points since the time of the last report to reach 5.95% at time of writing this report. A lengthy application process has left the applicants vulnerable to these financial risks; and
- Construction cost inflation of:
  - \$107,400 in hard cost escalation per month. The cost of construction rose at an average rate of 10.4% between 2018 and 2024, resulting in cost escalation of \$230,000 per month over that time frame. The pace at which costs are rising has eased in 2024 and for the purposes of this study, these costs were modelled with a 4% increase. Figure 4 highlights the financial risks a lengthy application process imposes on developments during negative economic events.

**Figure 4: Construction Cost Inflation, Hard Costs and Wages, Ontario, 2018-2024**



- Wage inflation adds some \$46,200 in construction wage cost escalation per month. It is estimated that a development of this size would require 236 full-time employees. Wage inflation is calculated as the estimated monthly increase in hourly wage, multiplied by the hours worked in that month by the 236 employees.

- While the pace at which construction hard costs and wages are rising has eased, the average cost per sq. ft. has risen by 72% since before the pandemic.

For a non-residential development, these costs include:

- \$979 in additional property taxes paid each month the applicant must hold the land;
- \$3,000 in opportunity/financing costs per month; and
- Construction cost escalation of:
  - \$52,940 in construction hard cost escalation per month. The cost of construction had been rising at an average rate of 6.4% per year between the 2018-2024 period, resulting in cost escalation of \$90,000 per year over that time frame. The cost of construction inflation was modelled with 3.8% increase (Figure 4).
  - Wage inflation adds some \$28,000 in construction wage cost escalation per month. It is estimated that a development of this size would require 144 full-time employees. Wage inflation is calculated as the estimated monthly increase in hourly wage, multiplied by the hours worked in that month by the 144 employees.
  - While the pace at which construction hard costs and wages are rising has eased, the average cost per sq. ft. is up 42% since before the pandemic.

In total, the site plan delay on a residential investment adds \$173,000 in costs per month of delay for a landowner/developer, and \$85,000 in costs per month for a non-residential development.

Appendix A3 -A6 present the calculation on additional taxes paid, financing and cost escalation.

## ***COSTS BORNE BY THE GENERAL ECONOMY AND FINAL USERS***

### ***Higher development charges for homeowners and office investors***

A significant risk to potential homeowners and office investors is the cost associated with higher development charges (DCs).

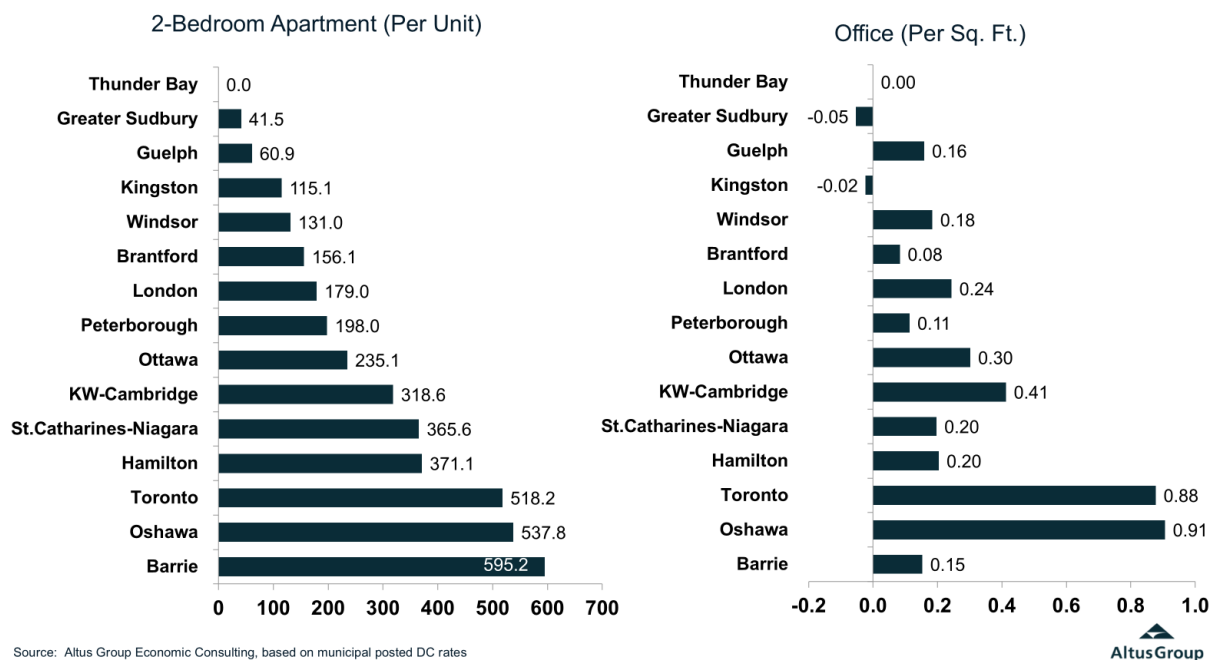
Development charge (DC) by-laws expire every five years. Before a DC by-law expires, a municipality calculates new DC rates based on the capital needs associated with the new residential and non-residential growth over a certain planning horizon.

Delaying a development at the site plan approval stage, exposes those homes or non-residential space to 20 and 24 months of DC escalation, respectively.

The increase in DC rates as a result of a by-law review can be significant. For example, average DC rates for a 2-bedroom apartment rose by \$34,000 across Ontario (on a weighted average basis) since the time of the last edition of this report.

The average monthly increase in apartment development charges over the past seven years was \$405 per unit per month in Ontario between 2017 and 2024, on a weighted average basis. The increase in development charges per month and unit ranged from a low of \$0 in Thunder Bay where there are no development charges, to a high of \$595 per month in Barrie.

**Figure 5: Average Monthly Increase in Development Charge Rates, 2-Bedroom Apartments and Office Space, by CMA in Ontario, 2017-2024**



For office buildings, the average DC rates increased by \$0.52 per sq. ft per month between 2017 and 2024. The increase in development charges per sq. ft. per month ranged from a low of a \$0.05 per sq. ft. drop in Greater Sudbury to a high of \$0.91 in Oshawa. Thunder Bay also does not charge development charges on non-residential developments.

It should be noted that since DC rate increases tend to occur in either small amounts each year (via annual or semi-annual indexing), or in large amounts at each DC by-law review prior to expiry every five years, meaning that for some end users, the impact will be greater than others.

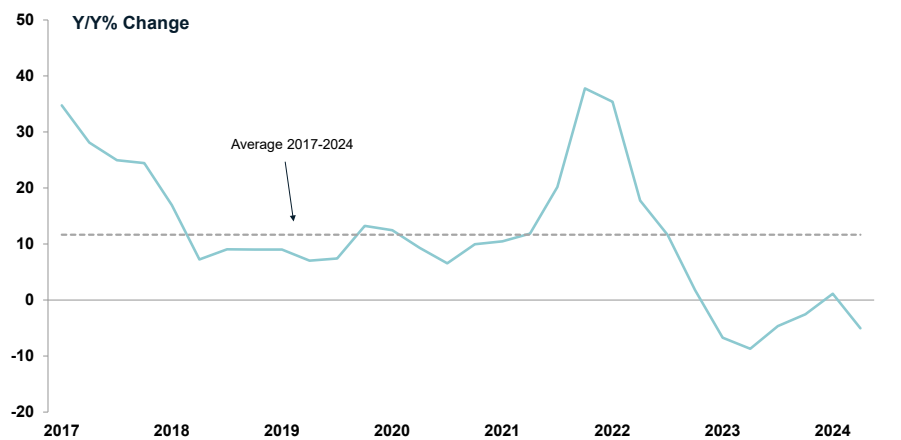


**Lost mortgage equity for first time home buyers**

Delays in development application reviews impact how supply can respond to new demand. These delays mean that the residential and non-residential spaces will not be on the market in time to meet prospective demand.

In a market with limited supply, additional months of site plan review time are costly to first-time homebuyers due to the inability to purchase a home and begin building equity sooner. For each month an application spends in the site plan review process, these prospective new home buyers are not paying a mortgage and are not building equity in a new home and may be continuing to rent their existing home.

**Figure 6: Average Apartment Price Growth, Ontario, 2017-2024**



Source: Altus Group Economic Consulting, based on Canadian Real Estate Association



Home prices have risen at an average pace of roughly 10% per year between 2018 and 2024. That means that would be home buyers have missed out on over 60% in home price appreciations over this period. Therefore, every month of delay results in an average loss of roughly \$300 in home equity per apartment. For a 100-unit building, total lost equity is roughly \$30,000.

**Increased rents for office tenants**

Over the 2016-2024 period, gross office rents for Class A office space (including net rent and operating costs) in Ontario increased by an average of 1.2% per year, from \$30.43 per sq. ft. to \$33.48 per sq. ft. This equates to an average increase of \$0.38 per sq. ft. per year. On a per month basis, rents increased by approximately \$0.032 per sq. ft. For the 50,000 sq. ft. office building, each additional month spent in the site plan process increases total gross rents payable by tenants by \$1,589 per month.

## SUMMARY OF COSTS

The total estimated monthly costs by category of a site plan delay are shown in Figure 7.

**Figure 7: Summary of the Monthly Costs of Site Plan Delay, Ontario**

	Residential		Non-Residential	
<u>Municipalities</u>	CDN\$/Project	CDN\$/Per Unit	CDN\$/Project	CDN\$/Sq. Ft.
Delayed Tax Revenue	21,278	213	24,060	0.48
<u>Landowners/Developers/Builders</u>				
Additional Taxes	4,448	44	979	0.02
Carrying Costs of Financing	14,753	148	3,012	0.06
Cost Inflation - Construction	107,367	1,074	52,940	1.06
Cost Inflation - Wages	46,217	462	28,051	0.56
<b>Total</b>	<b>172,785</b>	<b>1,728</b>	<b>84,983</b>	<b>1.70</b>
<u>General Economy, Homeowners and Final Users</u>				
Development Charges	51,134	511	25,762	0.52
Lost Equity <sup>1</sup>	29,684	297	0	0.00
Increased Rents	0	0	1,589	0.03
<b>Total</b>	<b>80,818</b>	<b>808</b>	<b>27,351</b>	<b>0.55</b>
<b>Total Costs</b>	<b>274,881</b>	<b>2,749</b>	<b>136,393</b>	<b>2.73</b>

\*Based on weighted averages of CMAs in Canada

Assuming 50% of occupants of condominium apartments are first-time home buyers that  
<sup>1</sup> are currently renting their dwelling

Source: Altus Group Economic Consulting

Details of these findings are found in the Appendix.

In total, the indirect costs of site plan delay on a monthly basis for a 100-unit apartment building are \$275,000, or roughly 0.88% of the building's construction cost. Over half of these costs are borne by the landowner/developer, while costs to the general economy and future homeowners totals \$81,000. The total 21-month delay in site plan application review adds **\$5.7 million in costs** to this development scenario.

For a 50,000 sq. ft. office building, the indirect costs of site plan delay average \$136,000 a month, or roughly 0.81% of the construction cost. Over half of these costs are borne by the landowner/developer, while costs to municipalities total almost \$27,300. The total 21-month delay in site plan application review adds **\$2.9 million** in costs to this development scenario.

Please refer to the appendix (A9) for a more detailed explanation of the monthly costs and changes relative to 2018.

**Figure 8: Total Monthly Indirect Costs of Site Plan Delay, Ontario, CDN\$**

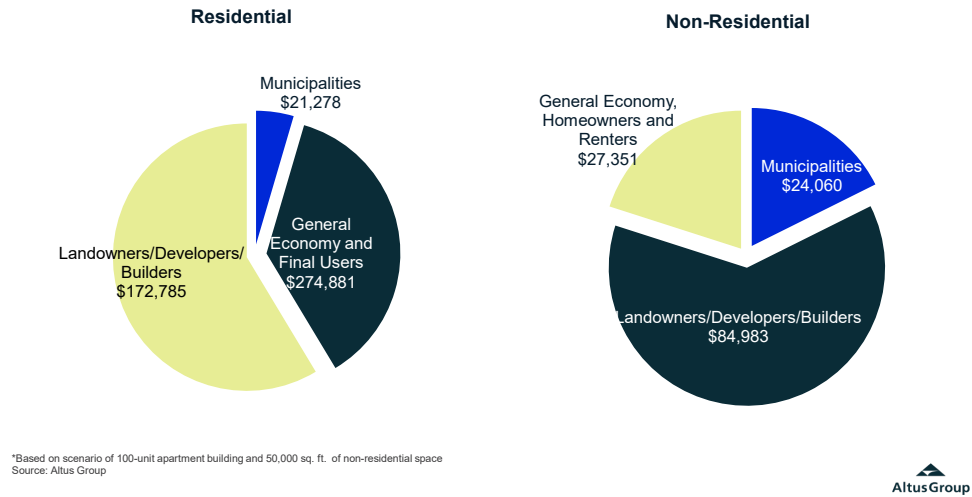
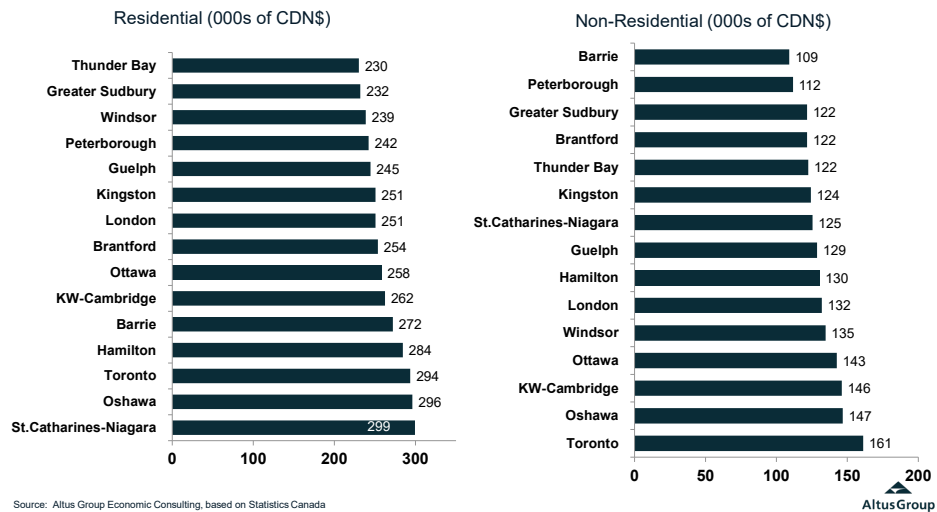


Figure 9 shows the monthly costs by major CMA in Ontario. A detailed calculation of these costs can be found in the appendix (Figure A7).

**Figure 9: Monthly Costs, Example Scenario, by CMA**



The figure shows that the monthly costs of site plan delay on an example development scenario range from:

- A high of \$299,000 in St. Catharine's-Niagara to a low of \$230,000 in Thunder Bay for a residential development scenario; and
- A high of \$161,000 in Toronto to a low of \$109,000 in the Barrie CMA for non-residential.

## TOTAL COSTS TO THE ECONOMY

This section assesses these costs as a total annual cost for the Ontario economy.

### TOTAL ANNUAL COSTS

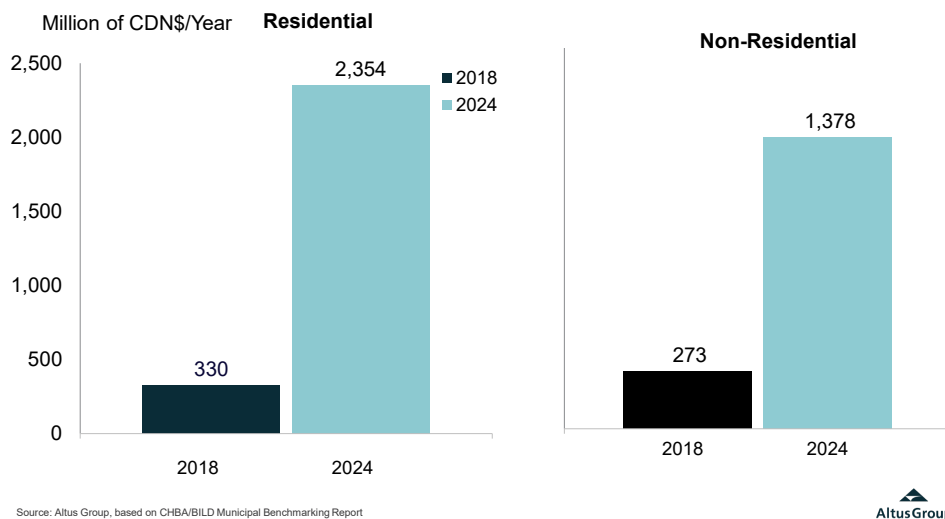
It is estimated that there were roughly \$19.5 billion<sup>4</sup> worth of building permits per year subject to a site plan approval in the 2018-2024 period, up from \$10.6 billion in the 2018 edition of this study. This breaks down as \$12.2 billion in residential buildings and \$7.4 billion in non-residential space.

If the monthly costs of site plan delay account for 0.88% of residential construction spending<sup>5</sup>, this implies that costs would total almost \$2.2 billion per year for the Ontario economy.

If the monthly costs of site plan delay account for 0.80% of non-residential construction spending, this implies that costs would total almost \$1.3 billion per year for the Ontario economy.

**The delay in the site plan review process costs the Ontario economy \$3.5 billion dollars per year, up from \$300-\$900 million estimated in the 2018 study.**

**Figure 10: Annual Indirect Costs of Site Plan Delay, Ontario, 2018 and 2024**



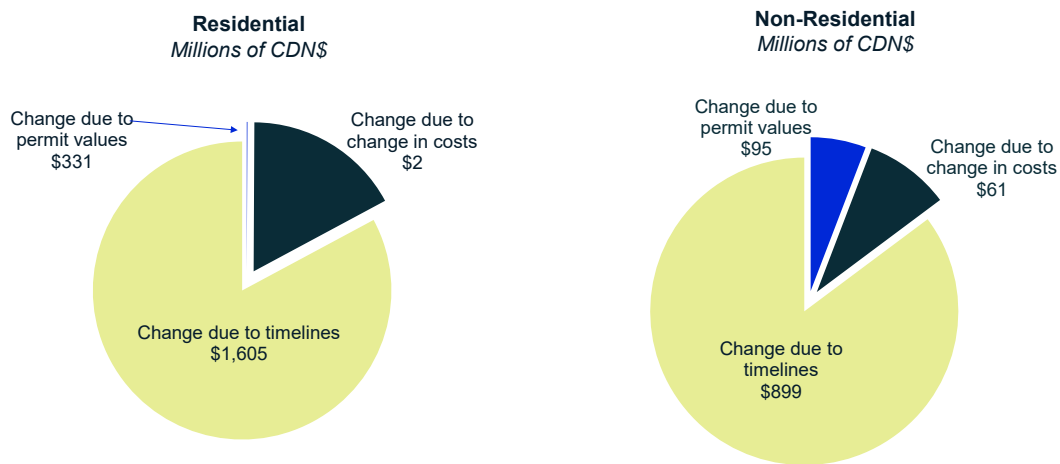
<sup>4</sup> Based on Statistics Canada building permit data on new units created. Assumes site plan applies to 5% of all new single-detached homes, 20% of rows and 100% of apartments; 100% of all new major commercial, industrial and institutional.

<sup>5</sup> 22 months of costs accumulate over a year. Recent development projects will have 12 months of delay, while applications started in the prior year would occur an additional 10 months of delay

The total costs to the economy have gone up by over \$3.0 billion. The drivers of the increase in costs to the whole economy, relative to those estimated in the 2018 report, are shown in Figure 11. The increase in costs is driven by the following:

- Increase in monthly costs – estimated monthly costs have gone up by \$1,000 per year for residential developments and \$36,000 per year for non-residential development accounting for \$63 million of the total change;
- An increase in construction activity. The estimate of building permits subject to site plan control have doubled. More construction projects waiting for site plan approval will result in more costs accumulating. The rise in construction activity accounts for \$425 million of the change in economic costs; and
- The biggest and most important driver is the months of delay increase. Every year recent development projects will have 11 months of delay, while applications started in the prior year would incur an additional 10 months of delay. The change in the timeline added \$2.5 billion to costs.

**Figure 12: Change in Annual Indirect Costs of Site Plan Delay, by Driver, Ontario, 2018 2024**



Source: Altus Group

The results of the monthly costs to the Ontario economy are shown by major CMA in Figure 13. The figure shows that the costs from residential developments range from a low of \$191,000 in Greater Sudbury, to a high of \$68 million in the Toronto CMA. The costs from

non-residential developments range from a low of \$241,000 in Greater Sudbury, to a high of \$33 million in the City of Toronto.

**Figure 2: Annual Costs of Site Plan Delay, Residential Investments, by CMA, 2024**

Census Metropolitan Area	A	B	C	D
	Value of Construction Investment Subject to Site Plan (CDN\$, 000s)	Monthly Costs as a % of Construction Costs %	Monthly Indirect Costs of Site Plan Delay (CDN\$, 000s)	Total Cost/Year (CDN\$, 000s)
			$= (A \times B)$	$= C \times 12$
Barrie	204,183,459	0.87%	1,778,208	
Brantford	68,348,276	0.81%	554,733	
Greater Sudbury	25,740,633	0.74%	191,135	
Guelph	125,391,513	0.78%	981,202	
Hamilton	574,731,023	0.91%	5,231,991	
Kingston	136,130,067	0.80%	1,091,362	
KW-Cambridge	641,750,279	0.84%	5,388,191	
London	466,114,902	0.80%	3,738,976	
Oshawa	306,517,573	0.95%	2,905,922	
Ottawa	947,705,455	0.83%	7,821,569	
Peterborough	42,729,923	0.78%	331,295	
St. Catharines-Niagara	263,775,898	0.96%	2,526,403	
Thunder Bay	30,160,378	0.74%	222,249	
Toronto	7,251,457,458	0.94%	68,135,978	
Windsor	155,648,611	0.76%	1,188,288	
<b>Totals</b>				
Total CMAs	11,240,385,447	0.91%	102,087,502	
Non-CMAs	925,288,533	0.53%	4,924,167	
<b>Ontario</b>	<b>12,165,673,979</b>	<b>0.88%</b>	<b>107,011,669</b>	<b>2,247,245,056</b>

Source: Altus Group Economic Consulting based on Statistics Canada

**Figure 14: Annual Costs of Site Plan Delay, Non-Residential Investments, by CMA, 2024**

Census Metropolitan Area	A	B	C	D
	Value of Construction Investment Subject to Site Plan (CDN\$, 000s)	Monthly Costs as a % of Construction Costs %	Monthly Indirect Costs of Site Plan Delay (CDN\$, 000s)	Total (CDN\$, 000s)
			$= (A \times B)$	$= C \times 12$
Barrie	88,815,060	0.65%	574,130	
Brantford	92,478,515	0.72%	666,437	
Greater Sudbury	33,549,958	0.72%	241,631	
Guelph	136,574,285	0.76%	1,041,430	
Hamilton	465,125,016	0.77%	3,593,454	
Kingston	77,980,031	0.74%	574,239	
KW-Cambridge	336,090,689	0.87%	2,909,579	
London	266,861,752	0.78%	2,088,392	
Oshawa	229,675,115	0.87%	1,997,740	
Ottawa	481,233,672	0.84%	4,065,712	
Peterborough	53,058,880	0.66%	351,065	
St. Catharines-Niagara	224,955,142	0.74%	1,672,315	
Thunder Bay	73,963,622	0.73%	536,277	
Toronto	3,508,242,149	0.95%	33,494,567	
Windsor	213,823,349	0.80%	1,705,474	
<b>Totals</b>				
Total CMAs	6,282,427,237	0.88%	55,512,440	
Non-CMAs	1,132,223,881	0.39%	4,417,009	
<b>Ontario</b>	<b>7,414,651,118</b>	<b>0.81%</b>	<b>59,929,449</b>	<b>1,258,518,439</b>

Source: Altus Group Economic Consulting based on Statistics Canada

*Costs in terms of housing and non-residential space*

Figure 15 puts the annual indirect costs of site plan delay into perspective. The total costs associated with a lengthy site plan application process equals the equivalent investment needed to build 7,200 large apartments per year and over 3.7 million in non-residential space.

**Figure 3: Annual Cost of Site Plan Delay in Terms of Residential Units and Non-Residential Sq. Ft., Ontario, as of 2024**

	A	B	C	D
	Total Annual Costs of Site Plan Delay	Average Construction Costs	Amount of Space that could be Built	Number of Units that could be Built
	(CDN\$,000s)	\$ Per Sq. Ft	Sq. Ft.	Units
			= $(A/B)$	= $C/1000$
Residential	2,247,245,056	313	7,191,184	<b>7,191</b>
Non-Residential	1,258,518,439	338	<b>3,728,944</b>	--

Source: Altus Group Economic Consulting



## CONCLUSION AND IMPLICATIONS

This report reviewed the indirect costs to the Ontario economy associated with a lengthy site plan process. The results show that:

- **The delay in site plan application review costs the Ontario economy \$3.5 billion dollars a year, up from \$300-\$900 million a year in 2018.**
- The cost of site plan delays is equivalent to the investment needed to build an additional 7,200 residential units per year and 3.7 million sq. ft. of non-residential space.
- It is estimated that it takes a municipality an average of 23 months to review a site plan application in Ontario, up from 6 months at the time of the 2018 edition of this Study.
- During that time, an example development of a 100-unit apartment building will accumulate \$5.7 million in economic costs, while a non-residential development will accumulate \$2.9 million in economic costs.

## **APPENDIX A – ADDITIONAL INFORMATION**

FIGURE A1: CALCULATION IN MUNICIPAL LOST TAX REVENUE, RESIDENTIAL DEVELOPMENT, ONTARIO CMAS, 2024

	A	B	C	D	E	F	G	H	I	J	K
	Value of Construction Investment Subject to Site Plan	Average Price of Land/acre	Average Annual Property Tax Rate	Monthly Tax Rate	Monthly Taxes on Vacant Land	Average Price of Apartments	Estimated Value of 100-Unit Apartment Unit	Average Annual Property Tax Rate	Monthly Tax Rate	Monthly Taxes	Difference in Monthly Tax Revenue
<u>Census Metropolitan Area</u>	(\$,000s)	\$	%	=C/12	=DxB	\$	\$, = Fx100	%	%, =H/12	\$, =G*I	\$, =J-E
Barrie	204,183,459	824,627.8	2.2%	0.2%	1,529.63	217,138	21,713,750	1.1%	0.1%	19,252	17,722
Brantford	68,348,276	458,692	3.2%	0.3%	1,205.72	155,325	15,532,500	1.6%	0.1%	20,530	19,324
Greater Sudbury	25,740,633	458,692	3.9%	0.3%	1,498.09	171,825	17,182,500	1.7%	0.1%	24,951	23,453
Guelph	125,391,513	227,068	3.0%	0.3%	572.71	257,600	25,760,000	1.3%	0.1%	28,328	27,756
Hamilton	574,731,023	967,625	2.6%	0.2%	2,107.61	265,775	26,577,500	1.3%	0.1%	29,833	27,726
Kingston	136,130,067	227,068	3.5%	0.3%	657.39	219,500	21,950,000	1.5%	0.1%	26,764	26,107
KW-Cambridge	641,750,279	524,136	3.1%	0.3%	1,338.01	204,125	20,412,500	1.3%	0.1%	21,649	20,311
London	466,114,902	227,068	3.6%	0.3%	679.77	134,925	13,492,500	2.6%	0.2%	28,925	28,245
Oshawa	306,517,573	462,065	2.4%	0.2%	921.57	343,525	34,352,500	1.7%	0.1%	48,899	47,977
Ottawa	947,705,455	4,968,613	2.0%	0.2%	8,115.40	243,650	24,365,000	1.0%	0.1%	20,304	12,189
Peterborough	42,729,923	359,807	3.1%	0.3%	938.15	230,550	23,055,000	1.7%	0.1%	31,743	30,805
St. Catharines-Niagara	263,775,898	531,050	3.4%	0.3%	1,513.56	192,075	19,207,500	2.3%	0.2%	36,745	35,232
Thunder Bay	30,160,378	464,730	4.0%	0.3%	1,533.89	171,825	17,182,500	1.7%	0.1%	24,470	22,936
Toronto	7,251,457,458	4,247,331	1.7%	0.1%	5,845.17	341,756	34,175,625	0.9%	0.1%	25,683	19,838
Windsor	155,648,611	464,730	4.7%	0.4%	1,806.99	126,450	12,645,000	2.0%	0.2%	21,421	19,614
<b>Total CMAs</b>	<b>11,240,385,447</b>	<b>3,306,008</b>	<b>2.1%</b>	<b>0.2%</b>	<b>5,690</b>	<b>299,635</b>	<b>29,963,468</b>	<b>1.12%</b>	<b>0.09%</b>	<b>26,092</b>	<b>21,278</b>

Source: Altus Group, based on Altus Data Studio, Municipal property tax rates as of December 2024

FIGURE A2: CALCULATION IN MUNICIPAL LOST TAX REVENUE, NON-RESIDENTIAL DEVELOPMENT, ONTARIO CMAS, 2024

	A	B	C	D	E	F	G	H	I	J	K
	Value of Construction Investment Subject to Site Plan	Average Price of Land/acre	Average Annual Property Tax Rate	Monthly Tax Rate	Monthly Taxes on Vacant Land	Average Price of Office Space/Sq Ft.	Estimated Value of 50,000 Sq. ft. of Office Space	Average Annual Property Tax Rate	Monthly Tax Rate	Monthly Taxes	Difference in Monthly Tax Revenue
Census Metropolitan Area	(\$,000s)	\$	%	=C/12	=DxB	\$	\$, = Fx50,000	%	%, =H/12	\$, =G*I	\$, =J-E
Barrie	88,815,060	202,407	2.2%	0.002	375.45	201.03	10,051,389	1.8%	0.15%	14,678	14,302.60
Brantford	92,478,515	397,853	3.2%	0.003	1,045.80	158.42	7,920,750	3.2%	0.26%	20,820	19,774.70
Greater Sudbury	33,549,958	397,853	3.9%	0.003	1,299.39	148.67	7,433,333	3.9%	0.33%	24,277	22,977.90
Guelph	136,574,285	1,091,952	3.0%	0.003	2,754.10	212.75	10,637,500	3.0%	0.25%	26,830	24,075.61
Hamilton	465,125,016	317,818	2.6%	0.002	692.25	204.72	10,236,043	2.6%	0.22%	22,295	21,603.15
Kingston	77,980,031	317,818	3.5%	0.003	920.13	148.67	7,433,333	3.5%	0.29%	21,521	20,600.40
KW-Cambridge	336,090,689	350,200	3.1%	0.003	893.99	226.55	11,327,702	3.1%	0.26%	28,917	28,023.25
London	266,861,752	317,818	3.6%	0.003	951.45	148.67	7,433,333	3.6%	0.30%	22,253	21,301.72
Oshawa	229,675,115	169,319	2.4%	0.002	337.70	178.34	8,917,125	2.1%	0.17%	15,288	14,949.88
Ottawa	481,233,672	317,818	2.0%	0.002	519.10	297.90	14,894,813	2.0%	0.16%	24,328	23,809.09
Peterborough	53,058,880	164,430	3.1%	0.003	428.73	148.67	7,433,333	3.1%	0.26%	19,381	18,952.65
St.Catharines-Niagara	224,955,142	399,133	3.4%	0.003	1,137.58	121.76	6,088,095	3.4%	0.29%	17,352	16,214.29
Thunder Bay	73,963,622	753,258	4.0%	0.003	2,486.20	148.67	7,433,333	4.0%	0.33%	24,534	22,048.27
Toronto	3,508,242,149	900,585	1.7%	0.001	1,239.38	351.76	17,587,794	1.8%	0.15%	27,039	25,799.17
Windsor	213,823,349	753,258	4.7%	0.004	2,928.86	148.67	7,433,333	4.7%	0.39%	28,903	25,973.89
<b>Total CMAs</b>	<b>6,282,427,237</b>	<b>677,917</b>	<b>2.2%</b>	<b>0.2%</b>	<b>1,156</b>	<b>284</b>	<b>14,211,107</b>	<b>2.3%</b>	<b>0.2%</b>	<b>25,216</b>	<b>24,060</b>

Source: Altus Group, based on Altus Data Studio, Municipal property tax rates as of December 2024

FIGURE A3: CALCULATION OF LANDOWNER/DEVELOPER CARRYING COSTS, RESIDENTIAL DEVELOPMENT, ONTARIO CMA, 2024

	A	B	C	D	E	F	G	H
	Value of Construction Investment Subject to Site Plan	Average Price of Land/acre	Average Annual Property Tax Rate Tax Rate	Monthly Tax Rate	Monthly Taxes on Vacant Land	Interest Rate	Interest on Land Financing	Total Carrying Costs
Census Metropolitan Area	(\$,000s)	\$	%	=C/12	=DxB	%	\$, =F*B	\$, =G+E
Barrie	204,183,459	824,627.80	2.2%	0.2%	1,529.63	5.95	3,680	5,210
Brantford	68,348,276	458,692	3.2%	0.3%	1,205.72	5.95	2,047	3,253
Greater Sudbury	25,740,633	458,692	3.9%	0.3%	1,498.09	5.95	2,047	3,545
Guelph	125,391,513	227,068	3.0%	0.3%	572.71	5.95	1,013	1,586
Hamilton	574,731,023	967,625	2.6%	0.2%	2,107.61	5.95	4,318	6,426
Kingston	136,130,067	227,068	3.5%	0.3%	657.39	5.95	1,013	1,671
KW-Cambridge	641,750,279	524,136	3.1%	0.3%	1,338.01	5.95	2,339	3,677
London	466,114,902	227,068	3.6%	0.3%	679.77	5.95	1,013	1,693
Oshawa	306,517,573	462,065	2.4%	0.2%	921.57	5.95	2,062	2,984
Ottawa	947,705,455	4,968,613	2.0%	0.2%	8,115.40	5.95	22,172	30,288
Peterborough	42,729,923	359,807	3.1%	0.3%	938.15	5.95	1,606	2,544
St. Catharines-Niagara	263,775,898	531,050	3.4%	0.3%	1,513.56	5.95	2,370	3,883
Thunder Bay	30,160,378	464,730	4.0%	0.3%	1,533.89	5.95	2,074	3,608
Toronto	7,251,457,458	4,247,331	1.7%	0.1%	5,845.17	5.95	18,954	24,799
Windsor	155,648,611	464,730	4.7%	0.4%	1,806.99	5.95	2,074	3,881
<b>Total CMAs</b>	<b>11,240,385,447</b>	<b>3,306,008</b>	<b>2.1%</b>	<b>0.2%</b>	<b>5,690</b>	<b>5.95</b>	<b>14,753</b>	<b>19,567</b>

Source: Altus Group, based on Altus Data Studio, Municipal property tax rates as of December 2024

FIGURE A4: CALCULATION OF LANDOWNER/DEVELOPER CARRYING COSTS, NON-RESIDENTIAL DEVELOPMENT, ONTARIO CMA, 2024

	A	B	C	D	E	F	G	H
	Value of Construction Investment Subject to Site Plan	Average Price of Land/acre	Average Annual Property Tax Rate Tax Rate	Monthly Tax Rate	Monthly Taxes on Vacant Land	Interest Rate	Interest on Land Financing	Total Carrying Costs
Census Metropolitan Area	(\$,000s)	\$	%	=C/12	=DxB	%	\$, =F*B	\$, =G+E
Barrie	88,815,060	202,407	2.2%	0.002	375.45			
Brantford	92,478,515	397,853	3.2%	0.003	1,045.80	5.95	1,775	2,821
Greater Sudbury	33,549,958	397,853	3.9%	0.003	1,299.39	5.95	1,775	3,075
Guelph	136,574,285	1,091,952	3.0%	0.003	2,754.10	5.95	4,873	7,627
Hamilton	465,125,016	317,818	2.6%	0.002	692.25	5.95	1,418	2,111
Kingston	77,980,031	317,818	3.5%	0.003	920.13	5.95	1,418	2,338
KW-Cambridge	336,090,689	350,200	3.1%	0.003	893.99	5.95	1,563	2,457
London	266,861,752	317,818	3.6%	0.003	951.45	5.95	1,418	2,370
Oshawa	229,675,115	169,319	2.4%	0.002	337.70	5.95	756	1,093
Ottawa	481,233,672	317,818	2.0%	0.002	519.10	5.95	1,418	1,937
Peterborough	53,058,880	164,430	3.1%	0.003	428.73	5.95	734	1,162
St. Catharines-Niagara	224,955,142	399,133	3.4%	0.003	1,137.58	5.95	1,781	2,919
Thunder Bay	73,963,622	753,258	4.0%	0.003	2,486.20	5.95	3,361	5,848
Toronto	3,508,242,149	900,585	1.7%	0.001	1,239.38	5.95	4,019	5,258
Windsor	213,823,349	753,258	4.7%	0.004	2,928.86	5.95	3,361	6,290
<b>Total CMAs</b>	<b>6,282,427,237</b>	<b>677,917</b>	<b>2.2%</b>	<b>0.2%</b>	<b>1,156</b>	<b>5.95</b>	<b>3,012</b>	<b>4,163</b>

Source: Altus Group, based on Altus Data Studio, Municipal property tax rates as of December 2024

FIGURE A5: CALCULATION OF CONSTRUCTION HARD COST INFLATION, RESIDENTIAL AND NON-RESIDENTIAL DEVELOPMENT, ONTARIO MUNICIPALITIES, 2024

**Adjusted**

Year	Apartment Building	Office Building
	Index (2023=100)	
Q3 2017	55.2	66.6
Q3 2024	104.0	103.9
<i>Percent</i>		
% Increase (Q32017-Q32014)	88.4%	56.0%
Average Annual Cost	4.4%	4.4%
Average Monthly % Increase	0.37%	0.37%

**Actual, 2017-2024**

Year	Apartment Building	Office Building
	Index (2023=100)	
Q3 2017	55.2	66.6
Q3 2024	104.0	103.9
<i>Percent</i>		
% Increase (Q32017-Q32014)	88.4%	56.0%
Average Monthly % Increase	0.76%	0.53%

**Estimate of Monthly Construction Cost Escalation**

	Apartment Building (100- units)	Office Building (50,000 SF)
	Dollars	
Construction Costs	31,250,000	16,875,000
<i>Percent / Month</i>		
Average Monthly Construction Cost Escalation	0.34%	0.31%
<i>Dollars / Month</i>		
Construction Cost Escalation / Month	107,367	52,940

**Estimate of Monthly Construction Cost Escalation**

	Apartment Building (100- units)	Office Building (50,000 SF)
	Dollars	
Construction Costs	31,250,000	16,875,000
<i>Percent / Month</i>		
Average Monthly Construction Cost Escalation	0.76%	0.53%
<i>Dollars / Month</i>		
Construction Cost Escalation / Month	236,541	89,579

Source: Altus Group Economic Consulting based on Statistics Canada

FIGURE A6: CALCULATION OF CONSTRUCTION WAGE COST INFLATION, RESIDENTIAL AND NON-RESIDENTIAL DEVELOPMENT, ONTARIO, 2024

**Average Hourly Wage, Select Construction Trades, 2011-2017**

Year	Carpenter	Crane Operator	Cement Finisher	Electrician	Plumber	Total / Average
<b>Average - Ontario CMAs</b>						
Q2 2014	50.44	52.78	45.83	58.95	56.50	52.90
Q2 2024	62.85	62.22	57.15	76.07	73.85	66.43
Increase: 2015-2024	12.42	9.44	11.32	17.12	17.35	13.53
Average Monthly \$ Increase	0.10	0.08	0.09	0.14	0.14	0.11
Average Monthly % Increase	0.18%	0.14%	0.18%	0.21%	0.22%	0.19%

Source: Altus Group Economic Consulting based on CANSIM, Table 327-0003



FIGURE A7: CALCULATION OF OFFICE RENT INFLATION, NON-RESIDENTIAL DEVELOPMENT, ONTARIO CMAS, 2013-2023

<b>Rental</b>	<u>Toronto</u>	<u>Barrie</u>	<u>Brantford</u>	<u>Sudbury</u>	<u>Guelph</u>	<u>Hamilton</u>	<u>Kingston</u>	<u>Kitchener- Waterloo</u>	<u>London</u>	<u>Oshawa</u>	<u>Ottawa</u>	<u>Peterboro- ugh</u>	<u>St. Catharines- Niagara</u>	<u>Thunder Bay</u>	<u>Windsor</u>
2013	1131	1004	814	841	916	854	994	906	848	955	939	873	822	787	699
2023	1826	1540	1348	1232	1588	1493	1519	1574	1358	1566	1442	1325	1330	1221	1128
% Chg	61.5%	53.4%	65.6%	46.5%	73.4%	74.8%	52.8%	73.7%	60.1%	64.0%	53.6%	51.8%	61.8%	55.1%	61.4%
Annual % Chg	4.9%	4.4%	5.2%	3.9%	5.7%	5.7%	4.3%	5.7%	4.8%	5.1%	4.4%	4.3%	4.9%	4.5%	4.9%
Chg	695.00	536.00	534.00	391.00	672.00	639.00	525.00	668.00	510.00	611.00	503.00	452.00	508.00	434.00	429.00
Annual Chg	69.50	53.60	53.40	39.10	67.20	63.90	52.50	66.80	51.00	61.10	50.30	45.20	50.80	43.40	42.90
Monthly Chg	5.79	4.47	4.45	3.26	5.60	5.33	4.38	5.57	4.25	5.09	4.19	3.77	4.23	3.62	3.58

Source: Altus Group, based on Altus Data Studio

FIGURE A8: CALCULATION OF MONTHLY COST OF SITE PLAN DELAY, RESIDENTIAL AND NON-RESIDENTIAL DEVELOPMENT, ONTARIO CMAS, 2024

	Monthly Cost of Time Associated with Site Plan Review									Total as % of Construction Costs
	Municipalities	Applicants				End Users				
	Delayed Tax Revenue	Additional Taxes	Carrying Costs of Financing	Cost Inflation - Construction	Cost Inflation - Wages	Development Charges	Lost Equity	Increased Rents	Total	
<b>Residential Apartment Building</b>										
Toronto	27,805	3,426	9,428	107,367	46,217	26,897	29,684	290	251,114	0.80%
Barrie	18,257	1,530	9,428	107,367	46,217	14,288	24,821	223	222,131	0.71%
Brantford	19,643	1,206	9,428	107,367	64,127	5,086	31,026	223	238,106	0.76%
Greater Sudbury	22,790	1,402	9,428	107,367	65,214	617	15,513	163	222,494	0.71%
Guelph	27,691	573	9,428	107,367	63,514	724	24,201	280	233,777	0.75%
Hamilton	28,338	2,108	9,428	107,367	64,127	10,501	31,026	266	253,162	0.81%
Kingston	24,446	1,402	9,428	107,367	73,630	3,122	15,513	219	235,127	0.75%
KW-Cambridge	20,764	1,338	9,428	107,367	63,514	4,922	22,960	278	230,571	0.74%
London	26,420	1,402	9,428	107,367	65,249	1,482	15,513	213	227,073	0.73%
Oshawa	42,920	718	9,428	107,367	46,217	29,031	24,821	255	260,757	0.83%
Ottawa	18,546	1,402	9,428	107,367	73,630	6,126	24,821	210	241,529	0.77%
Peterborough	30,813	1,402	9,428	107,367	46,217	7,735	21,719	188	224,870	0.72%
St. Catharines-Niagara	35,226	1,514	9,428	107,367	66,439	37,232	37,232	212	265,236	0.85%
Thunder Bay	22,350	1,402	9,428	107,367	68,092	-	15,513	181	224,334	0.72%
Windsor	19,565	1,402	9,428	107,367	66,613	4,487	15,513	179	224,554	0.72%
<b>Office Building</b>										
Toronto	21,597	3,426	2,485	52,940	28,051	43,876	n.a.	1,589	153,963	0.91%
Barrie	13,273	1,530	2,485	52,940	28,051	7,661	n.a.	1,589	107,528	0.64%
Brantford	19,330	1,206	2,485	52,940	38,921	4,165	n.a.	1,589	120,635	0.71%
Greater Sudbury	20,341	1,402	2,485	52,940	39,581	-	n.a.	1,589	118,337	0.70%
Guelph	25,889	573	2,485	52,940	38,549	7,940	n.a.	1,589	129,964	0.77%
Hamilton	19,882	2,108	2,485	52,940	38,921	10,200	n.a.	1,589	128,124	0.76%
Kingston	18,032	1,402	2,485	52,940	44,689	-	n.a.	1,589	121,136	0.72%
KW-Cambridge	27,183	1,338	2,485	52,940	38,549	20,637	n.a.	1,589	144,721	0.86%
London	18,645	1,402	2,485	52,940	39,602	12,179	n.a.	1,589	128,841	0.76%
Oshawa	12,778	718	2,485	52,940	28,051	45,317	n.a.	1,589	143,878	0.85%
Ottawa	20,384	1,402	2,485	52,940	44,689	15,094	n.a.	1,589	138,582	0.82%
Peterborough	18,178	1,402	2,485	52,940	28,051	5,673	n.a.	1,589	110,317	0.65%
St. Catharines-Niagara	15,601	1,514	2,485	52,940	40,325	9,855	n.a.	1,589	124,307	0.74%
Thunder Bay	20,557	1,402	2,485	52,940	41,328	-	n.a.	1,589	120,300	0.71%
Windsor	24,217	1,402	2,485	52,940	40,430	9,216	n.a.	1,589	132,278	0.78%

Source: Altus Group Economic Consulting

FIGURE A9: CHANGE IN MONTHLY COSTS, ITEMIZED, ONTARIO, 2024

	<i>Residential</i>					<i>Non-Residential</i>				
	2018*	2024 at prior methodology	2024 Actual	Change 2018-2024 Actual	Change 2018-2024 Actual	2018*	2024 at prior methodology	2024 Actual	Change 2018-2024 Actual	Change 2018-2024 Actual
<b>Municipalities</b>	\$	\$	\$	\$	%	\$	\$	\$	\$	%
Delayed Tax Revenue	32,587	21,278	21,278	(11,309)	(35)	16,833	24,060	24,060	7,227	43
<b>Applicants</b>										
Additional Taxes	5,589	4,448	4,448	(1,142)	(20)	5,589	4,448	979	(4,610)	(82)
Carrying Costs of Financing	91,175	137,617	14,753	(76,422)	(84)	34,191	74,313	3,012	(31,178)	(91)
Cost Inflation - Construction	40,049	107,367	107,367	67,318	168	16,365	52,940	52,940	36,575	224
Cost Inflation - Wages	54,035	57,828	46,217	(7,818)	(14)	22,284	23,800	28,051	5,768	26
Total Applicants	190,848	307,260	172,785	(18,064)	(9)	78,428	155,501	84,983	6,555	8
<b>End Users</b>										
Development Charges	12,573	51,134	51,134	38,561	307	3,036	25,762	25,762	22,726	748
Lost Equity	36,496	29,684	29,684	(6,812)	(19)	--	0	--	--	--
Increased Rents	1,026	1,026	0	(1,026.0)	(100.0)	1,875	1,589	1,589	(286.5)	(15.3)
Total End Users	50,095	81,844	80,818	30,724	61	4,911	27,351	27,351	22,439	457
<b>Total Costs</b>	<b>273,530</b>	<b>410,382</b>	<b>274,881</b>	<b>1,351</b>	<b>0</b>	<b>100,172</b>	<b>182,852</b>	<b>136,393</b>	<b>36,221</b>	<b>36</b>

\*Based on average of a high and low scenario

<sup>1</sup> Assuming 50% of occupants of condominium apartments are first-time home buyers that are currently renting their dwelling

Source: Altus Group Economic Consulting

Two major methodology changes were made:

- Cost of financing. The prior edition calculated financing costs off the estimated total construction costs of the project. This report calculates financing cost off the cost of land only.
- Labour wage inflation – the structure of the Canadian economy has changed since the time of the last report. It is now estimated that fewer hours of labour are needed to build each development than was previously assumed for both scenarios. In 2018, it was assumed that the investment to build 100-units would require 295 full-time equivalent jobs (FTEs). It is now estimated that 236 FTEs would be required.

# Contribution of the Architectural Services Industry to Ontario's Economy

Independent Real Estate Intelligence

December 20, 2024



# **Contribution of the Architectural Services Industry to Ontario's Economy**

Prepared for:

**Ontario Association of Architects  
(OAA)**

Prepared by:

**Altus Group Economic Consulting**

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December 20, 2024

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## EXECUTIVE SUMMARY

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The architecture industry plays an important role and makes a significant contribution to Ontario's economy. The architectural services footprint in Ontario is much more than the spending and design associated with the architectural services industry and the vertical construction industry, it also encompasses spending in the architectural, engineering and related technologies education & training sector, spending by tourists whose travel to Ontario is significantly motivated by Ontario's architecture, as well as the economic benefits that all of these activities generate.

The architecture industry in Ontario creates and supports thousands of jobs and adds tremendous value to Ontario's gross domestic product (GDP) annually.

**Economic activity** from the architecture industry's entire footprint in Ontario totaled **\$186.7 billion, accounting for 17% of GDP**. The industry also **contributes \$94.4 billion to Ontario's GDP** and generates **\$57.1 billion in personal income** as well as **\$41.3 billion in business earnings**. In addition, the footprint of the architecture industry supports 776,000 jobs in Ontario.

The architectural services industry's expenditure in providing architectural and related services' contribution to the Ontario economy cannot be overlooked, as it produces **\$4.3 billion in annual economic activity**. These activities add to the economy in various ways by:

- Contributing **\$2.7 billion** to Ontario's GDP;
- Supporting **21,000 jobs each year**, many of which are high-paying jobs in professions and the trades;
- Generating **\$1.8 billion in personal income**, related to labour income and other sources of income; and
- Generating **\$1.1 billion in business earnings** for small, medium and large companies.

Architectural services play a crucial role in supporting Ontario's construction industry. Every year, the construction sector generates about \$168.9 billion in economic activity and contributes about \$83.7 billion to Ontario's GDP. It also supports \$50.3 billion in personal income and \$36.2 billion in business earnings. There are 673,585 jobs that are supported by the construction sector in Ontario.

Ontario's architects also contribute to Ontario's prosperity in varied and significant ways. Building design is at the foundation of the aesthetic appeal, functionality, and environmental sustainability of buildings and the space in between. It is also instrumental in:

- Supporting the housing, workplace and recreational needs of Ontario residents;
- Contributing to the tourism and economic investment attractiveness of Ontario; and
- Influencing the construction and assessment values of our buildings, and therefore, the property taxes collected by governments.

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# 1 INTRODUCTION

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The architectural services industry plays a critical role in Ontario's economy, particularly in its rapidly expanding real estate industry. The development and construction of buildings, and subsequently their daily operations, directly support thousands of jobs and add tremendous value to Ontario's gross domestic product (GDP). Although architectural services professionals represent a very small minority of the range of professionals and trades involved in bringing new buildings to life, they play an important and outsized role. Architectural designs are essential to the multi-billion-dollar construction sector. In addition to building up and maintaining Ontario's infrastructure, the construction sector generates about \$83.7 billion per year, or 7.5% of Ontario's GDP. It is also a significant source of jobs, wages and government revenue. Ontario's physical infrastructure provides an important platform for economic growth, prosperity and social well-being.

While millions of Ontarians rely on buildings designed by the architectural industry for housing, commercial accommodation and recreation spaces, its fundamental value to our communities and economy can sometimes be overlooked.

Gaining an understanding of the extent of the economic contribution of an industry such as architectural services is of importance to multiple stakeholders. Policymakers, as well as municipal planners and politicians, can make smarter decisions and have an improved perspective on the industry with more information on its extent. Homeowners, contractors, developers, and private and public investors in Ontario will be better able to see how their decisions affect the industry and the millions of Ontarians who live, work and play in the properties designed by architects.

In 2024, Altus Group was approached by the Ontario Association of Architects (OAA) to a 2017 Study that analysed the economic benefits of the architectural services industry and its contribution to the construction sector.

This report takes a comprehensive approach to assessing the economic contribution of the entire footprint of the architectural services industry in Ontario. This includes an assessment of the impact of spending associated with the provision of architectural services, the architectural education and training sector, tourism induced by architecture, and the vertical (building) construction sector.

The impacts studied include:

- The **size and share of Gross Domestic Product (GDP)**;
- **Jobs created, directly and indirectly**;
- **Jobs and economic activity** induced by the direct and indirect rounds of job creation;
- **Wage and salary income** generated by the direct and indirect jobs created;
- **Business earnings**, generated by the direct and indirect economic activity created; and
- **An array of other benefits to Ontario.**

## 1.1 Report Structure

The report contains the following four main sections:

- **Section Two** provides an economic profile of Ontario’s architectural industry, including recent economic trends, and the economic indicators used in this report;
- **Section Three** estimates the economic benefits generated by the architectural footprint in Ontario, including economic activity, GDP, employment, income, and other benefits;
- **Section Four** provides a synopsis of other benefits of architecture, including the importance of good building design, architecture’s contribution to the provision of residential and commercial accommodation for Ontario’s residents and visitors; and
- **Section Five** is the conclusion.

In addition, appendices are provided with detailed tables and information on the methodology used in the report.

## 1.2 Research Methodology

The data in this report are derived from several sources, as listed below:

- **Statistics Canada:** Data on the operating revenue and expenses of architectural services, expenditures of students enrolled in architectural studies, investment in residential and non-residential building construction, the input-output model, and activities related

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to real estate management are sourced from Canada's national statistical agency, Statistics Canada;

- **Altus Group:** Site development and management fees estimates were derived from Altus Group Cost Consulting information. We estimated site development expenditures at about 11% of new residential construction costs, and management fees at about 3% of investment in residential apartments and investment in commercial and institutional buildings. Information also came from Altus Group's in-house databases for sale transactions of commercial real estate properties in Canada; and
- **Other Secondary Sources:** The analysis also uses data from Canada Mortgage and Housing Corporation (CMHC), The Ontario Association of Architects (OAA), and the Ontario Ministry of Tourism's "Travel Activities and Motivations" survey.

The methodology employed in this study has two major components:

- 1. Estimations of Direct Activity:** The estimates of economic activity within the various components of the industry draw heavily on data from Statistics Canada and other sources as described above. Where direct data are not available, estimates are calculated, based on appropriate indirect sources of information; and
- 2. Analysis of Spinoff Activity:** In addition to the direct activity (estimated in 1. above), it is important to consider two more rounds of spinoff economic activity, including the indirect (suppliers of goods and services to the architectural services industry and the construction sector) and induced (expenditure of income earned by the architectural services industry) rounds of activity. The analysis uses economic multipliers, which are derived from the Statistics Canada's Input-Output Model of the Ontario Economy. These multipliers are applied to the direct activity (estimated in 1. above) to determine total economic activity. The input-output approach is the most appropriate approach to use in undertaking a study such as this as it very carefully maps and tracks the detailed interrelatedness between all sectors of the economy. In this way, the model is able to track the impact of spending on the provision of architectural services, construction and building operations back to all aspects of the value chain.

A more detailed discussion of the Statistics Canada Input-Output model can be found in Appendix A.

### **1.3 Caveat**

This analysis has been prepared on the basis of the information and assumptions set forth in the text. However, it is not possible fully to document all factors or account for all the changes that may occur in the future. This report relies on information from a variety of secondary sources. While every effort is made to ensure the accuracy of the data, Altus Group cannot guarantee the complete accuracy of the information used in this report from these secondary sources. This report has been prepared solely for the purposes outlined herein and is not to be relied upon or used for any other purposes or by any other party without the prior written authorization of Altus Group Limited.

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## 2 PROFILE OF ONTARIO'S ARCHITECTURAL INDUSTRY

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This section provides an overview of economic indicators used in this report to illustrate recent trends in the architecture industry and measure its contribution to the Ontario economy i.e. industry revenues, employment etc. It also explains how architectural services and the overall footprint of architecture-related spending in Ontario make a significant contribution to the economy and social well-being of Ontario and its residents.

### 2.1 Economic Benefits Measured by This Report

This report analyzes economic benefits of the architectural industry in Ontario as well as its broader footprint, which is comprised of architecture building design and other related services, education and training, tourism, and construction. The various benefits are generated by four major components of the industry:

- **The architectural services provided by the members of the OAA are essential components of construction activity:** The planning, design, site development and construction and/or renovation of various buildings contribute directly to the Ontario economy and generate substantial “spinoff” benefits. The operating expenditure of the architecture industry also has a multiplier effect on provincial economic activity: operating expenditure, including salaries, wages, commissions and benefits, as well as professional, administrative and rental, leasing and accommodation expenditure, generate notable economic benefits annually;
- **The architectural education and training sector;**
- **Tourism spending** induced by visitors to Ontario that are attracted by the province’s architecture generates billions of dollars in economic activity and related economic and social benefits; and
- **Investment spending of the construction sector** generates a significant contribution to Ontario’s economy annually.

To quantify the economic contribution of the architecture industry and construction sector, this report focuses on several economic parameters, including:

- **Economic Activity:** The volume of goods and services consumed in the economy that are related to the provision of architectural services such as sub-contracting professional services to other design professionals and both residential and non-residential construction investment;
- **Contribution to GDP:** The value-added component of the economic activities, quantified by the contribution of the activities to Ontario's Gross Domestic Product (GDP);
- **Jobs:** The number of jobs generated from the activities of architectural services and construction, including both direct and spinoff jobs;
- **Income:** The volume of income generated through these various economic activities, including: wages, other labour earnings, mixed-income, and corporate profits; and
- **Government Tax Revenues:** Federal and provincial tax revenues, primarily personal and corporate income taxes, and other payroll deductions.

## 2.2 The Architectural Services Industry

The architecture industry plays an important role in Ontario's economy. The design and construction of residential, industrial, commercial, institutional and government buildings and their daily operations directly support thousands of jobs each year. The construction sector also provides housing and workplaces to millions of Ontarians, while architecture students in Ontario and the educational infrastructure established for their training make a noteworthy economic contribution.

Architectural companies, architects and other professionals involved in the provision of architectural services generate significant economic activity in Ontario as they compensate employees; pay utilities, office expenses, and rental and leasing fees; advertise and sub-contract services to other construction design service providers such as landscape architects, engineers, and interior designers.

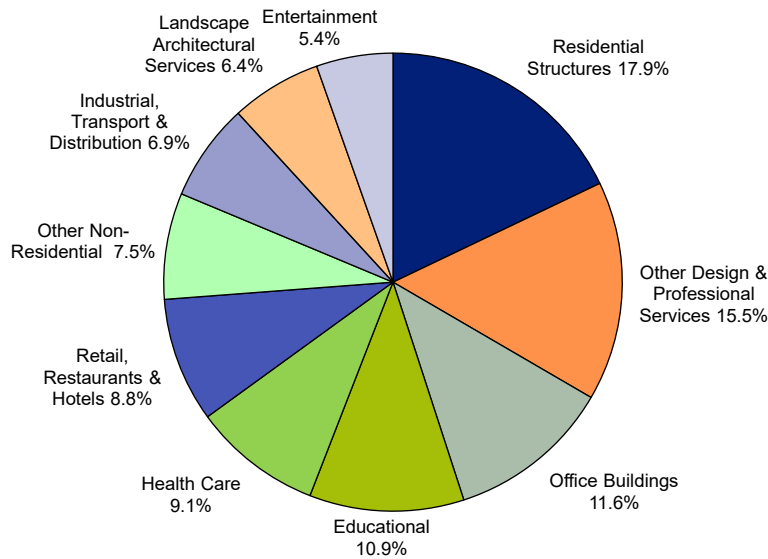
**2.2.1 Distribution of Operating Revenue by Type for Architectural & Landscape Architectural Services**

The architecture industry generated \$2.8 billion in revenues in 2023, up from \$1.3 billion a decade ago.

Figure 1 shows the distribution of operating revenue by type of service, earned from the provision of architectural services, landscape architectural services, and other design & professional services<sup>1</sup> (for Canada).

Figure 1

**Distribution of Operating Revenue by Type for the Architectural & Landscape Architectural Services Industries, 2023 (Canada)**



Source: Altus Group Economic Consulting based on data from Statistics Canada

The analysis is based on data from Statistics Canada’s Annual Survey of Service Industries and shows the following trends:

- The architectural services industry generated 75.6% of the total industry operating revenue of architectural services and landscape architectural services in 2023. Landscape architects (6.7%) and other design and professional services (17.5%) accounted for the other 24.4% of industry operating revenue.

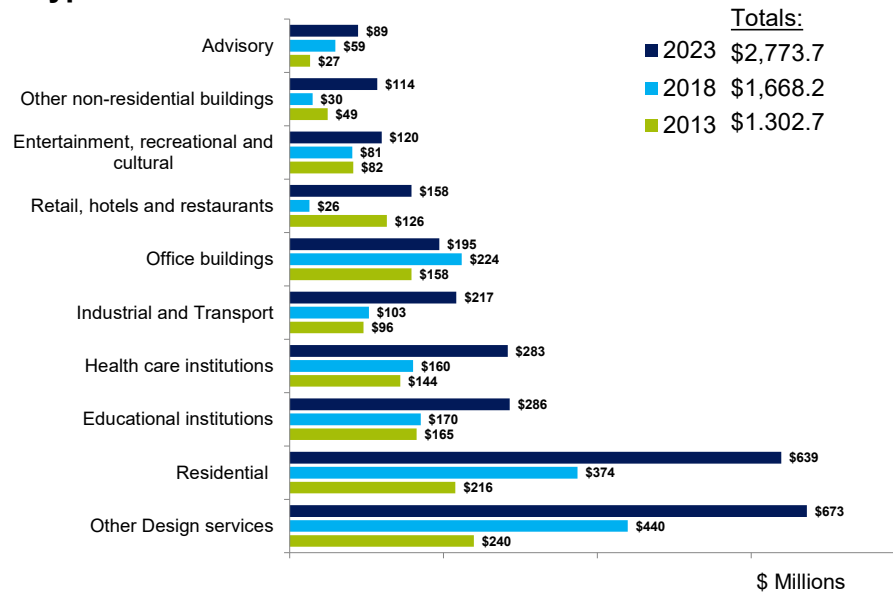
<sup>1</sup> Services include urban planning, project site master planning, interior design, engineering and other services.

- The majority of the operating revenue earned from the provision of architectural services (about 48.1% of total industry operating revenue) is from the design of non-residential structures; and
- The largest sources of operating revenue from non-residential structures are the design of office buildings (7%), education institutions (10.3%), healthcare institutions (10.3%), and retail, restaurant and hotel establishments (5.7%).

Figure 2 shows the operating revenue of architectural and landscape architectural services by type of service in 2013, 2018 and 2023. It provides a comparative illustration of the growth in operating revenues over a ten and five-year period.

Figure 2

### Ontario Architectural Services Operating Revenue by Type of Service



Source: Altus Group Economic Consulting based on data from Statistics Canada

- In 2023, the architectural and landscape architectural services industry earned \$2.8 billion in operating revenue, of which 75% was generated by architectural services.
- Operating revenue of the architectural and landscape architectural services industry increased by 13.3% per year between 2018 and 2023, compared to 5.6% per year in the prior five years.
- Over the five-year period, operating revenue grew by a total of 66%.

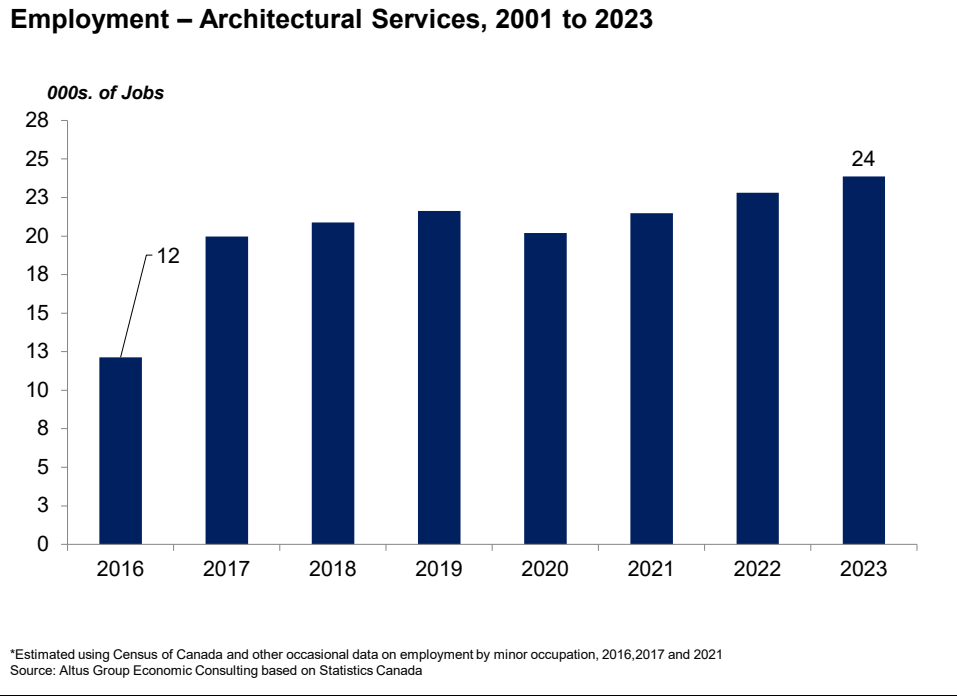


- All types of services, with the exception of office building design grew in the last five years, which speaks to the weakness in office markets across Canada following the pandemic.

**2.2.2 Jobs Profile of Architectural, Engineering and Related Services Industry in 2023**

- Architects are categorized by the Labour Force Survey as part of a broader group of professionals including engineers and related services, a category which accounted for some 85,000 jobs in Ontario in 2023. Roughly 13,000 of those jobs were created since 2018. Between 2018 and 2023 employment grew by an annual average of 3.5%, compared to 3.0% per year in the prior five years. In comparison, during the same period, job growth in Ontario was a 1.4% per year between 2018 and 2023 and 1.8% in the prior five years;
- Architectural is estimated to account for 28% of these jobs in 2023, up from 20% in 2016. It is estimated that there are 24,000 jobs in fields related to architecture in Ontario in 2023, up from 12,000 in 2016.

Figure 3



- As of September 2024, the average weekly earnings for architects and engineers in Ontario was \$1,802, 40% higher than the Ontario overall average of \$1,280.
- Average weekly earnings are up 30% from the time of the last report.

### 2.2.3 *Number of Architectural Services Firms and Firm Size Distribution*

There are over 4,000 registered firms in architectural (3,085) and landscape architectural services (978). The majority of these firms are self-employed (do not have employees) or small businesses. More than half are self-employed (2,502). The majority with employees (1,237) of Ontario's architectural services firms are small firms with 1-10 employees. There are only 15 medium and large-sized firms with over 100 employees.

## 2.3 **Architectural Education and Training Sector**

There were 121,095 students enrolled in architecture, engineering, and related technologies programs at Ontario's colleges and universities in the 2022/2023 school year, up from 94,071 in 2016. Almost 60% of those students were university students and almost 40% were college students

The tuition fees of architecture students account for about 30% of related post-secondary revenue and expenditure. With per-student architecture and related technologies tuition fees averaging roughly \$8,700 a year, it is estimated that some \$29,000 per student is spent by the architecture post-secondary education sector per year.

Gross post-secondary spending in Ontario to educate and train students of architecture, engineering, and related technologies is about \$3.5 billion.

Another \$1.9 billion is spent on the non-tuition expenses of university and college students, including accommodation, food, books and other supplies<sup>2</sup>.

Altus Group estimates that every year, almost \$5.4 billion is spent in the post-secondary education sector on the educational, training, and related living costs of architecture, engineering, and related technologies students.

## 2.4 **Architecture Tourism**

In 2023, Ontario hosted 124 million Canadian and foreign tourists, who spent a total of \$113 billion dollars. It is estimated that roughly \$2.0 billion of that

<sup>2</sup> University students in Ontario spend up to \$16,000 a year on non-tuition expenses.

spending was driven by tourists primarily motivated to visit Ontario for its historic sites, museums and architecture

The architecture of buildings is one of the attractions of arts and culture tourists. It is also an important feature of all buildings involved in the tourism infrastructure of most destinations. These buildings include airports, hotels, museums and art galleries, heritage buildings, entertainment venues, restaurants, and of course, iconic buildings and landmarks.

Arts and culture tourists are visitors who are motivated to travel in order to visit historic sites; patronise museums, art galleries, and art performances; and attend festivals, fairs and attractions.

Statistic Canada's 2007 "Travel Activities and Motivations" survey<sup>3</sup> provides more details about the trip motivations and demographics of arts and culture tourists. According to a 2012 Ontario Arts and Culture Tourism Profile, North American arts and culture tourists who travelled to Ontario in 2010 were "likely drawn from the pool of all North American tourists who have been to Ontario over a two-year span and were motivated to take a trip by an arts or cultural activity".

Of the North American overnight trips to Ontario, 89% have participated in an arts or cultural activity as one of their many travel activities on trips taken over a two-year period. Visiting historic sites or strolling in cities to see architecture was a significant motivator for 61% of North Americans who have visited Ontario. However, for almost one-fifth of North Americans with Ontario travel experience, visiting historic sites and/or strolling through cities to see architecture was the main reason for travelling to Ontario. The single largest motivator to visit Ontario was a desire to visit historic sites and see architecture.

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<sup>3</sup> This survey examined out-of-town, overnight travel behaviour of one or more nights over the 2005-2007 period and provided detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns. Mexico is excluded from the North American classification.

## 2.5 Construction

The vast majority of buildings built in Ontario are designed by architects and in many cases other architectural services critical to the development processes. Architects and the services that they provide are vital to Ontario's construction industry. Ontario's construction sector is an important component of Ontario's economy, and a range of economic benefits are generated from Ontario's vertical construction industry (i.e. building construction). Construction spending includes the residential and non-residential construction investment, site development expenditures, and management fees.

### 3 ESTIMATED ECONOMIC CONTRIBUTIONS

This section presents the economic benefits arising from the contribution of architects to the Ontario economy, including the benefit of spending arising from the provision of architectural services, sub-contractors, professionals, etc.

The non-tax benefits are calculated using multipliers derived from Statistics Canada's Interprovincial Input-Output Model of the Canadian Economy, and it is recognized that there are three "rounds" of activity:

- The direct round (actual economic activities and actual jobs within the multi-family rental sector); and
- Two spinoff rounds: the indirect (providers of goods and services to the sector) and the induced (economic activity and jobs related to the spending of incomes earned by workers in the sector).

In this section, economic benefits are generally expressed as direct impacts (the direct round) and "total impacts" – all three rounds.

A detailed description of the input-output model methodology is provided in Appendix A.

#### 3.1 Economic Benefits Associated with the Architectural Footprint in Ontario

The architectural services footprint in Ontario is much more than the spending and design associated with the architectural services industry and the vertical construction industry; it also encompasses spending in the architectural, engineering and related technologies education & training sector, spending by tourists whose travel to Ontario is significantly motivated by Ontario's architecture, as well as the economic benefits that all of these activities generate.

The architectural footprint in Ontario results in billions of dollars of spending and economic activity that generates many more billions of dollars of Gross Domestic Product (GDP), personal income, and business earnings, as well as hundreds of thousands of direct, indirect and induced jobs. These significant economic benefits to the Ontario economy are built up from the spending and economic impact of:

- Architectural services;
- Architectural education and training sector;

- Tourism induced by architecture; and
- Vertical (i.e. building) construction.

Ontario's architectural footprint delivers significant economic benefits annually by generating:

- About **756,224 person-years** of direct, indirect and induced employment;
- About **\$186.7 billion** in direct, indirect and induced economic activity;
- About **\$94.4 billion** in net contribution to GDP, or 8.0% of Ontario GDP;
- About **\$57.2 billion** in personal income tied to the creation of direct, indirect and induced jobs; and
- Some **\$41.3 billion** in operating business earnings (Economic Benefits of Ontario's Architectural Services).

Direct jobs and economic activity result from spending associated with architectural services; architectural education, training and related accommodations and amenities; tourism induced by architecture; and the vertical construction industry.

Figure 4

	Estimated Economic Benefits of the Architecture Industry in Ontario						
	Overall Architectural Footprint	Components of Architectural Footprint					
	Architectural Services	Post-secondary spending	Non-Tuition Student Spending	Education & Training	Tourism	Construction	
Economic Activity (\$millions)	186,697	4,312	5,320	3,656	8,976	4,526	168,883
Gross Domestic Product (\$millions)	94,438	2,654	3,947	2,114	6,061	2,007	83,717
Number of Jobs*	776,188	20,904	30,872	26,978	57,849	23,849	673,585
Wages (\$millions)	57,152	1,821	2,300	1,356	3,656	1,388	50,287
Business Earnings (\$millions)	41,312	1,146	1,960	977	2,936	966	36,264

\* Person-years of employment  
Source: Altus Group Economic Consulting based on Input / Output Model and Other Sources

### 3.2 Economic Benefits of Ontario's Architectural Services Industry

Ontario's architectural services industry designs and contributes to the construction of residential, industrial, commercial, institutional and government buildings. These daily operational activities directly support thousands of jobs each year.

Architectural companies, architects and other professionals involved in the provision of architectural services generate significant economic activity in Ontario as they compensate employees; pay utilities, office expenses, and rental and leasing; advertise and sub-contract services to other construction design service providers, such as landscape architects, engineers, and interior designers.

The operating expenditures of the architectural services industry deliver annual economic benefits by generating:

- About **20,900 person-years** of direct, indirect and induced employment;
- About **\$4.3 billion** in direct, indirect and induced economic activity;
- About **\$2.7 billion** in net contribution to GDP;
- About **\$1.8 billion** in personal income tied to the creation of direct, indirect and induced jobs; and
- Some **\$1.1 billion** in operating business earnings (Figure 5).

Direct jobs and economic activity also results from operating expenditures incurred in the provision of architectural services.

Figure 5

#### Estimated Economic Benefits of Architecture Industry in Ontario

	Direct	Indirect	Induced	Total
Economic Activity (\$millions)	2,353	920	1,040	4,312
Gross Domestic Product (\$millions)	1,517	520	616	2,654
Number of Jobs*	12,235	4,174	4,496	20,904
Wages (\$millions)	1,200	336	285	1,821
Business Earnings (\$millions)	351	179	616	1,146

\* Person-years of employment

Source: Altus Group Economic Consulting based on Input / Output Model and Other Sources

### 3.3 Economic Benefits of Ontario's Architectural Education, Training & Related Spending

Ontario's education and training infrastructure for the architectural, engineering and related technology services industries is responsible for billions of dollars of spending and economic activity and thousands of jobs. The over 121,000 architecture, engineering, and related technologies students enrolled in Ontario's colleges and universities are supported by an education

and training ecosystems that generates about \$5.4 billion in annual spending, or \$45,000 per student. Spending includes expenditure on tuition, academic and research grants, public and private sector investments, student accommodation, meals, supplies, amenities and other living expenses of students.

Spending in Ontario's architectural education and training sector delivers annual economic benefits by generating:

- About **57,849 person-years** of direct, indirect and induced employment;
- About **\$9.0 billion** in direct, indirect and induced economic activity;
- About **\$6.0 billion** in net contribution to GDP;
- About **\$3.7 billion** in personal income tied to the creation of direct, indirect and induced jobs; and
- Some **\$2.9 billion** in operating business earnings (Figure 6).

Figure 6

#### Estimated Economic Benefits of Architectural Education, Training & Related Spending in Ontario

	Direct	Indirect	Induced	Total
Economic Activity (\$millions)	5,449	1,519	2,008	8,976
Gross Domestic Product (\$millions)	4,030	839	1,193	6,061
Number of Jobs*	42,260	6,902	8,688	57,849
Wages (\$millions)	2,609	497	550	3,656
Business Earnings (\$millions)	1,418	326	1,193	2,936

\* Person-years of employment

Source: Altus Group Economic Consulting based on Input / Output Model and Other Sources

### 3.4 Economic Benefits of Architecture Related Tourism Spending

The single largest motivator to visit Ontario among many tourists is a desire to visit historic sites and see architecture. The architecture of Ontario's built environment is a magnet for tourists, especially those that are attracted to the unique features of the province, its cities and iconic structures and heritage buildings. Altus Group estimates that North American travellers to Ontario who were primarily motivated by Ontario's historic sites, museums and architecture spent around \$2.0 billion across Ontario. This spending by



tourists that are drawn to Ontario mainly by its architecture delivers annual economic benefits by generating:

- About **23,849 person-years** of direct, indirect and induced employment;
- About **\$4.5 billion** in direct, indirect and induced economic activity;
- About **\$2.0 billion** in net contribution to GDP;
- About **\$1.4 million** in personal income tied to the creation of direct, indirect and induced jobs; and
- Some **\$3.2 billion** in operating business earnings (Figure 7).

Direct jobs and economic activity result from spending by tourists whose travel to Ontario is significantly motivated by its architecture.

Figure 7

#### Estimated Economic Benefits of Tourism Spending Induced by Architecture in Ontario

	<u>Direct</u>	<u>Indirect</u>	<u>Induced</u>	<u>Total</u>
Economic Activity (\$millions)	2,033	459	2,033	4,526
Gross Domestic Product (\$millions)	1,095	453	459	2,007
Number of Jobs*	17,006	3,497	3,345	23,849
Wages (\$millions)	916	259	212	1,388
Business Earnings (\$millions)	34	3,173	34	3,241

\* Person-years of employment

Source: Altus Group Economic Consulting based on Input / Output Model and Other Sources

### 3.5 Economic Benefits of Ontario's Construction Sector

The vast majority of buildings built in Ontario are designed by architects and in many cases other architectural services critical to the development processes. Architects and the services that they provide are vital to Ontario's construction industry. Ontario's construction sector is an important component of Ontario's economy, and a range of economic benefits are generated from Ontario's vertical construction industry (i.e. building construction).

Below are estimates of the jobs, economic activity, personal income, and business earning that are sustained or generated annually as a result of the residential and non-residential construction activity, site development expenditures, and management fees:

- Approximately **673,585 person-years** of direct, indirect and induced employment;
- About **\$168.9 billion** in direct, indirect and induced economic activity;
- Some **\$83.7 billion** in total net contribution to GDP;
- About **\$50.3 billion** in personal income from the creation of direct, indirect and induced jobs; and
- Some **\$36.2 billion** in total operating business earnings (Figure 8).

Figure 8

### Estimated Economic Benefits of Ontario's Construction Sector and Development Activities

	Direct	Indirect	Induced	Total
Economic Activity (\$millions)	95,629	46,787	26,466	168,883
Gross Domestic Product (\$millions)	44,695	23,335	15,687	83,717
Number of Jobs*	349,204	200,546	123,835	673,585
Wages (\$millions)	28,385	14,668	7,234	50,287
Business Earnings (\$millions)	11,910	8,667	15,687	36,264
* Person-years of employment				
Source: Altus Group Economic Consulting based on Input / Output Model and Other Sources				

## 4 OTHER BENEFITS

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### 4.1 Good Design of Buildings

There are many potential benefits of well-designed buildings as a result of a design from a qualified architect, including:

- The improvement of indoor environmental quality (IEQ) can reduce respiratory illnesses, allergies and asthma (8% to 25% decrease in symptoms), and reduce sick building syndrome symptoms (20% to 50% decrease in symptoms) for the patrons of the building.<sup>4</sup>
- Good building design can reduce future operating and maintenance costs.<sup>5</sup>
- The life expectancy of a building can be increased with good design and regular maintenance.<sup>6</sup>
- Good building design can improve safety and reduce crime.<sup>7</sup>

<sup>4</sup> Center for Environmental Design Research at the College of Environmental Design, *Benefits of Improving Occupant Comfort and Well-being in Buildings*, Berkeley USA

<sup>5</sup> Government of Western Australia, *Good Design Guide*, February 2013

<sup>6</sup> Journal of Building Appraisal, *Implications of Design Deficiency on Building Maintenance at Post-Occupational Stage*, August 2007

<sup>7</sup> Commission for Architecture & the Built Environment, *The Value of Good Design*, London UK, 2002

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## 5 CONCLUSION

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The architecture industry plays an important role and makes a significant contribution to Ontario's economy. The architectural services footprint in Ontario is much more than the spending and design associated with the architectural services industry and the vertical construction industry; it also encompasses spending in the architectural, engineering and related technologies education & training sector, spending by tourists whose travel to Ontario is significantly motivated by Ontario's architecture, as well as the economic benefits that all of these activities generate.

The architecture industry in Ontario creates and supports thousands of jobs and adds tremendous value to Ontario's gross domestic product (GDP) annually.

Economic activity from the architecture industry's entire footprint in Ontario totaled \$186.7 billion, or 17% of GDP. The industry also contributes \$94.4 billion to Ontario's GDP, generates \$57.1 billion in personal income, and generates \$41.3 billion in business earnings. In addition, the footprint of the architectural industry supports nearly one million jobs in Ontario.

Architectural services play a crucial role in supporting Ontario's construction industry. Every year, the construction sector generates about \$168.9 billion in economic activity and contributes about \$83.7 billion to Ontario's GDP. It also supports \$50.3 billion in personal income and \$36.2 billion in business earnings. There are 673,585 jobs that are supported by the construction sector in Ontario.

Ontario's architects also contribute to Ontario's prosperity in varied and significant ways. Building design is at the foundation of the aesthetic appeal, functionality, and environmental sustainability of buildings and the space in between. It is also instrumental in supporting the housing, workplace and recreational needs of Ontario residents; contributing to the tourism and economic investment attractiveness of Ontario, influencing the construction and assessment values of our buildings, and therefore the property taxes collected by governments.

## Glossary

**Capital Investment in Vertical Construction (buildings)** — A term that represents investment in the erection, assembly, and completion of free-standing and static buildings in the residential, industrial, commercial and/or institutional sectors, generally on a permanent foundation, bedding or location. It includes both new construction and renovation:

- **New Construction Investment** — spending that includes capital investment in construction of new buildings and major additions to existing buildings.
- **Capital Improvement** — spending that includes capital investment related to the alteration and improvements of existing buildings.

**Economic Impact** — the generation of new spending and the creation of new jobs within a jurisdiction as a result of new economic activity in a specific sector. Generally, there are three “rounds” of economic impact:

- **Direct Impact** — effects of economic activity directly related to the subject sector.
- **Indirect Impact** — effects are related to economic activity in industries providing goods and services to the companies directly involved in the particular sector.
- **Induced Impact** — effects are generated from the expenditure of incomes generated in the direct and indirect rounds.

Note: collectively the ‘indirect’ and ‘induced’ rounds are referred to as economic “**spinoff**” activities.

**Economic Parameters** — a set of statistical measurements that can illustrate a sector’s impacts on the economy. In this report, they include:

- **Economic Activity** –the volume of goods and services consumed in the economy related to the development, construction and ongoing operation of the office real estate sector.
- **Contribution to GDP** - the value-added component of the economic activities, a measure of the contribution of the activities to Canada’s GDP.
- **Jobs** - in this report, the term “jobs” is close to but not the same as “person-years of employment.” The estimate of jobs provides the

number of workers that would be employed for a full-year; however, the estimate of person-years of employment includes both full and permanent part-time jobs.

- **Income** - the volume of income generated through various economic activities, with income including wages, other labour earnings, mixed-income, and corporate profits.
- **Government Tax Revenues** - federal and provincial tax revenues, primarily personal and corporate income taxes, and other payroll deductions such as Canadian Pension Plan contribution and Employment Insurance premium.

**Full-Time Equivalent Jobs** — represents the number of workers that would be employed for a full-year. Full-time equivalent jobs includes both full and permanent part-time jobs at the ratios appropriate for each of the industries involved. For example, two part-time jobs of twenty hours per week would be equivalent to one full-time equivalent job at forty hours per week.

**Gross Domestic Product (GDP)** — the total unduplicated value of the goods and services produced in the economic territory of a country or region during a given period.

**Mixed-Income** — this type of income consists of earnings of proprietors of unincorporated businesses (sole proprietorships and partnerships) such as retailers and consultants, earnings of independent professional practitioners such as lawyers and dentists, net (after expenses) rental income of owners of real property and the accrued net farm income of farm operators.

**Multiplier** — an input-output multiplier is a quantitative measure created by a particular input-output based economic model. It is an analytical answer to a hypothetical question about how a certain expenditure is expected to impact the economy.

**Ongoing Operations of Properties** - in this report, this term includes two categories of economic activity: brokerages fees and building management fees.

**Sector** – a grouping of industries or firms by similar characteristics of operations (e.g., retail trade sector, manufacturing sector, construction sector, mining sector, service sector, government sector).

## **Appendix A**

### **Description of the Input-Output Model**

Estimates for the economic impact of the current operations of the architectural sector are derived through the use of Statistics Canada's Input-Output Model of the Canadian Economy. The current model relates to the year 2021.

An input-output model is used to estimate the impacts of various types of economic activities. It is an accounting framework of an economy's production system. It shows the interconnections that exist between the various sectors of the economy when goods and services are produced. Using an input-output model, it is possible to determine which goods and services are required to achieve a certain production level in a particular industry – or the economy as whole.

There are generally said to be **three “rounds”** of impact:

- **Direct round** – jobs and economic activity directly related to the industry;
- **Indirect round** – jobs and economic activity connected to the supply chain supporting the industry; and
- **Induced round** – jobs and economic activity stimulated by the first two rounds.

### *Direct and Indirect Impacts*

The model takes expenditure on a given economic activity and translates it into the impacts on various industries – and ultimately, the amount of income, economic output, GDP and jobs supported.

A key component of an input-output model is the set of “input structures” for each economic activity covered by the model. An input structure literally splits the original expenditure among all the different inputs that are used in that economic activity. For example, building construction involves expenditures within a variety of industries – wood, steel, concrete, various service industries, etc. Each of these industries has an input structure of its own that involves inputs from a variety of other industries plus labour and owners of firms in that industry.

The input structure used to account for the impact on various sectors takes into consideration the origin of the various inputs. The model, therefore, is able to segment the location of the impacts that will take place somewhere in



the province and those that take place elsewhere in Canada. Imported materials and services do not provide an economic impact with respect to their point of origin, but will contribute to the economy in terms of components of their value added that accrue on Canadian soil – such as transportation and wholesale and retail margins.

An input-output model includes a full array of input structures that have been estimated for all industries in the economy. Use of the model in this analysis involves estimating the impacts of new building construction. To generate these estimates, capital investment in construction is applied to the model.

### *Definition of Jobs Impact*

Some of the findings are presented in terms of “jobs” generated. This is the term used by the Input-Output Division of Statistics Canada in its estimates of employment generated. The estimate of jobs provides the number of workers that would be employed for a full-year; however, the estimate includes both full and permanent part-time jobs at the ratios appropriate for each of the industries involved.

### *Induced Impact*

Traditionally, there is thought to be an additional round of economic impact from an activity, referred to as an induced impact. This is the so-called Keynesian multiplier effect resulting from the expenditure of incomes generated in the first two rounds. The wages, salaries and other income that accrue to households as a result of the direct and indirect rounds will, in turn, generate economic activity as these households spend their incomes in the general economy.

### *Change in Employment Estimates 2018 versus 2023*

Statistics Canada updates the level of its multipliers every 2 to 3 years. The 2021 update resulted in a significant revision to the structure of the Canadian economy. The result has been a significant reduction in the number of jobs created for every \$1 spent in the economy between 2013 and 2021. This has in part reduced the estimated impact of the architecture industry on jobs.

The impact of the change in the multiplier is seen in Figure A1. The figure shows that:

- Adjusting for the structure of the economy, the architecture sector created an additional 242,254 – 344,165 jobs since 2018.

**Figure A1**

#### **Effect of the Multiplier on Change in Jobs Supported by the Architecture Sector, Ontario, 2018 and 2024 Study**

	<u>2018</u>	<u>2024</u>	<u>Change</u>
		<b>Jobs</b>	
At 2013 Multipliers	956,525	1,300,690	344,165
At 2024 Multipliers	533,934	776,188	242,254

\* Person-years of employment

Source: Altus Group Economic Consulting based on Input / Output Model and Other Sources

# Memorandum

**To: Council**

Settimo Vilardi  
Donald Ardiel  
Jim Butticci  
Natasha Krickhan  
Michelle Longlade  
Elaine Mintz  
Anna Richter  
Susan Spiegel  
William (Ted) Wilson  
Marek Zawadzki

Loloa Alkasawat  
J. William Birdsell  
Kimberly Fawcett-Smith  
Jenny Lafrance  
Lara McKendrick  
Deo Paquette  
Kristiana Schuhmann  
Edward (Ted) Watson  
Thomas Yeung

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.1.a

**From:** Erik Missio, Communications Manager

**Date:** January 6, 2025

**Subject:** **June–December 2024 Operational Plan Update: Communications**

**Objective:** To update Council on activities undertaken in relation to the Operational Plan by the Communications service area during the second half of 2024.

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This memo provides a brief recap of activities in the Association's Communications service area from June to December, 2024. It also shares progress made in relation to operational priorities, as discussed during the February planning session.

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## Update on Regular Programs and Services

### Website

The OAA Website, the Association's virtual headquarters for members and the public alike, can be thought of as three sites:

- a publicly accessible site that includes multiple sub-databases for practice information, documents and publications, government correspondence, and other resources;
- a password-accessible site for those with OAA status that includes certain member-facing items like RFP Alerts, third-party event promo codes, and access to the CSA Standards program and Mentor Directory; and
- an iMIS-supported site that includes Conference registration, annual renewals, ConEd transcripts, experience-recording resources for those on the path to licensure, and the OAA store for making purchases.

Site traffic continues to rise, year over year. There were approximately 247,000 users over the course of 2024. There is a continual refresh of content on all sites daily, with Communications focused on the first two and providing links to the third. This includes addition of third-party Continuing Education (ConEd) [learning opportunities](#), [events of interest](#) to the profession or public, [news](#) in the media, or updates to documents in the [Practice Advisory Knowledge Base](#) or [Documents & Publications](#) database.

Whenever the OAA launches programming or initiatives, the website is updated in tandem with social media and direct emails to reflect the latest information. Examples include recurring items (such as reminders about the end of the reporting cycle for the ConEd program or licensing changes for those in the IAP, or announcements related to Conference or the SHIFT Challenge) and call-outs like requests for webinar proposals, Conference speakers, invitations to participate in voluntary surveys, or attendance at virtual or in-person events. These time-sensitive items can be found on the site's homepage, directly below a large photo of a recent Design Excellence project.

For the latter six months of 2024, there was quite a bit of important web development work, with staff working directly with the OAA's consultant, Enginess. For example, there were numerous improvements and changes to the OAA's [Employment Opportunities](#) pages for those who are posting job "classifieds." To ensure the OAA follows best practices and federal/provincial regulations, mandatory fields were added regarding anticipated salaries or ranges, as well as start times and whether artificial intelligence (AI) was to be used in the candidate selection/vetting process.

There were also numerous changes to the [OAA Directory](#), which includes status-holding individuals (i.e. OAA members, Student Associates, Honorary Members, Retired Members, Intern Architects) and all practices. Clearer definitions and listings have been added to those who have licences with terms, conditions, and limitations to better ensure the public understands the capabilities of these licence or Certificate of Practice (CoP) holders. Development work is also being finalized to include the aliases or informal names for both individuals and practices, to ensure users will understand, for example, that "Giuseppe Smith" is indeed a member when they search for "Joe Smith." General updates to the OAA Directory also continue, including discipline history.

Website work also included new pages related to:

- the end of the ConEd cycle, including overhauled [Frequently Asked Questions](#);
- [highlights from the Conference](#) in Niagara Falls (with photo galleries);
- new information on [provincial fair access requirements](#), as well as links for [international credentials and mobility](#);
- [Council elections](#);
- the SHIFT Challenge (which actually exists as a separate website at [www.shiftchallenge.ca](http://www.shiftchallenge.ca)); and
- a gallery for this year's [Queen's Park Picks](#).

Other updates for the Practice Advisory Knowledge Base regarding refreshed documents or changes brought about by code harmonization, etc., are detailed in a separate memo from the Practice Advisory Services team. (Information on OAA Website updates related to the advent of limited licences is explored later in this memo.)

OAA staff also made several posts on the bIOAAg section of the website, highlighting:

- the artwork of OAA members (via the annual [Summer Sketches](#) series);
- bios of the members of the [OAA Landscape Design Competition](#) jury and technical advisory group;
- new [Members of Long Standing](#), detailing their 50-year careers;
- the 20 [winners](#) and [finalists](#) in the Design Excellence program; and
- this year's [Queen's Park Picks](#) choices.

Based on website analytics from June 1 to December 12, 2024, the top five pages on the **publicly accessible site** (not including the home page) are:

5. Publications;
4. Intern Architect;
3. Continuing Education;
2. OAA Directory; and
1. Employment Opportunities.

For the **member-accessible site**, the five most-accessed pages are:

5. Architect page;
4. CSA Standards Access program;
3. Continuing Education;
2. Intern Architect page; and
1. Employment Opportunities.

To reflect the Strategic Plan's themes of [Equity, Diversity, and Inclusion](#) (including [Truth & Reconciliation](#)) and [Climate Action](#), OAA staff also continue to tag relevant news, events, and learning opportunities to ensure they appear in those discrete sections. There is also a continual effort to tag items for [Public Resources](#).

OAA staff receive direct feedback to facilitate edits or changes, occasionally through the website's [Digital Suggestion Box](#), and Council is always encouraged to share suggestions or pain points directly with OAA staff. Given commentary related to navigation and searching for particular items, staff are liaising with the Communications and Public Education Committee (CPEC) regarding improvements to user experience, as well as new layouts for the home page.

## E-communications

The OAA Communications team understands general concerns with an excess of email, but is also aware many members rely on such notices to stay informed of various important happenings within the Association or wider profession. As much as possible, the OAA limits the sending of emails to once a week, though there are instances when time-sensitive matters require a greater frequency.

Staff use MailChimp to send e-communications that are “voluntary” in nature, such as the *OAA News*, special news bulletins, *Conference Bulletins*, and the *Practice Advisory*. For Regulatory Bulletins to which one cannot unsubscribe (e.g. email notices regarding the path to licensure or the mandatory ConEd program, as well as preliminary information on Council elections), Communications now uses iMIS to send such emails to ensure they will reach the intended recipients.

During the second half of 2024, there have been 15 editions of the biweekly *OAA News* e-newsletter, each with eight to 10 news stories and additional links to the website. In addition to these “big” stories, there are departments listing upcoming events and Continuing Education opportunities, as well as recent examples of architecture in the news. Emphasis is placed on events (including information on virtually attending Council’s open sessions), volunteer/consultation activities, and regulatory matters.

In this same timeframe, there have been three *Practice Advisories* e-bulletins, developed with the Practice Advisory Services (PAS) team. Several special e-bulletins have also been sent to either all those with OAA status or select groups to share timely information on OAA initiatives like:

- the SHIFT Challenge call for submissions and jury announcement;
- the Fundamentals of Running an Architectural Practice (FRAP) course;
- surveys related to Conference or the Local Architectural Societies;
- the OAA Landscape Celebration;
- calls for webinar and Conference presenters;
- CSA signup reminders; or
- the (eventually cancelled) Meet the OAA virtual event.

These voluntary emails typically reach more than 7,800 addresses. The open rate (i.e. how many emails are actually opened by the recipient) is about 72% for *OAA News*, which is considered extremely high.

In addition to connecting with those who have OAA status, Communications also sent press releases to media on certain items, including the SHIFT Challenge, the Landscape Design Celebration, or Queen’s Park Picks.

**Social Media**

The OAA continues to use Instagram, X, and Facebook to share the vast majority of the information found in its e-newsletters and website. LinkedIn is used for “bigger” stories, as well as the sharing of *Practice Advisories* and items related to Continuing Education opportunities. (Staff employs both manually posting practices as well as a social media scheduler, Metricool, for greater efficiency.)

Use of [YouTube](#) has greatly increased. Initially, it would host videos of the AGM, “hype” videos for awards, and special events related to Conference. Now, OAA Continuing Education Webinars are being posted biweekly into a special playlist, as well as videos of the recorded podcast episodes.

Instagram continues to be quite popular, with the most viewed posts of the year include items related to the 2024 People’s Choice Award (a paid advertising campaign that reached 23,694 accounts), as well as posts related to Design Excellence (awards and jurors), Queen’s Park Picks, Summer Sketches, and a contest giveaway where the public was asked to share their Ontario building and the architecture practice that designed it. The success of that contest (a partnership with architect-owned walking map provider, Åvontuura) will be further explored in the new year, with a podcast-related contest now being developed for the first quarter.

Staff continue to plan an annual calendar of evergreen messaging to the public across channels about the role of the OAA as a regulator and about the role of the architecture profession and the built environment.

As shown below, social media audiences are growing in most cases, though Twitter/X has taken a hit given the exodus of users from that platform in recent months.



Followers: 8, 499 (up 922 followers from last December)



Followers: 7,822 (down 84 from last December)



Followers: 2,761 (up 173 from last December)



Followers: 15,777 (up 3,170 from last December)

## Public Outreach Events

The OAA Headquarters hosted two open-to-the-public events in the latter half of 2024, with the **Landscape Design Celebration** at the end of June and the **NOW Lecture** at the end of November. (Communications staff also provided support for the Queen's Park Picks event offsite, detailed in a separate memo.)

For the former event, nearly 100 attendees gathered at the OAA building to listen to short speeches from the OAA President, Vice President, Jury Chair, and Professional Advisor, followed by a presentation on the planned landscape architecture project by competition winners, Ja Architecture Studio. The catered event, which was free but required pre-registration, also enabled members and those from the public to view all 19 submissions for the competition.

For the NOW Lecture toward the year's end, Ja Architecture Studio returned to discuss progress on their work and also take a deeper dive into the ideas behind their design. The other set of speakers came from Lanescape, which was named the Best Emerging Practice earlier in the year. The firm discussed laneway housing and other types of secondary dwelling units. This event, which was catered, required a nominal admission (and pre-registration) of \$10 for interns and students or \$20 for members to ensure attendance. It also offered Structured Learning under the ConEd program.

In the second half of 2024, the OAA also supported numerous Society and third-party events by sponsoring programming via Public Awareness Sponsorships and Special Project Funding, as detailed in previous memos from the Communications and Public Education Committee (CPEC). Many of these funded or partially funded events were intended for a general public audience.

CPEC felt these initiatives to be important in order to execute the public outreach plan developed to support the five-year strategic plan. The Committee made tweaks to the third-party funding programs for 2025 to continue to amplify the OAA's fulfilment of the secondary objects of the *Architects Act*.

Communications assisted the Executive Director in authoring online articles for the Ontario Building Officials Association's *OBOA Journal* to connect with other industry partners. Articles written in the latter half of the year include:

- "Ensuring Integrity with Site Plans and Act Enforcement" (June);
- "Getting Ready for Ontario's New Building Code" (September); and
- "Addressing the Transition Period for Ontario's Building Code" (December).

OAA staff assisted the President, Executive Director, or members of Council for various media opportunities. In 2024, the president was quoted in articles for *Daily Commercial News* (Queen's Park Picks, site plan approvals, Conference), *Building.ca* (Design Excellence awards), *Northern Ontario Business* (Design Excellence), and *Digital Journal* (Conference), as well as had an opinion piece in *Canadian Architect* (housing design catalogue). Similarly, Communications staff offered support with respect to speaking notes for events on a variety of scales, from greetings delivered to members of the



Ontario Chapter of the United Architects of the Philippines group in August, or to the entire profession at The Buildings Show's International Architectural Roundtable in November.

Communications staff helped with the development of a planned Meet the OAA webinar, led by the Interns Committee, but this event was unfortunately postponed. Preliminary planning has also begun on the Doors Open Toronto event for the spring.

## Podcasting

During the second part of the year, the OAA shared another three episodes of the public-facing **Architecturally Speaking** podcast series. The following links are to YouTube, though episodes are on the [OAA Website](#) and via other podcast sources:

- "[Transforming Cities: The Role of Transit-Oriented Development](#);"
- "[Innovative Architecture: Design Competitions](#)"; and
- "[Rivers of Change: How Water Can Shape Community Design](#)."

There was also a [short holiday message](#), recapping some of the discussions.

The series, which is at more than 2,500 downloads, will continue with another three more episodes in 2025, with staff working alongside CPEC to determine the merits of continuing or expanding the program.

## Awards

After OAA staff led the biennial in-depth process related to the Design Excellence and OAA career awards throughout the first five months of the year, the second half of 2024 largely focused on preparing for the SHIFT2025 Challenge, *Reshaping Communities*. This edition of the biennial OAA Awards program looks to underscore the vital role architectural thinking plays in evolving how our built environments respond to today's most pressing challenges. It calls for conceptual ideas that foster sustainable development, inclusivity, and a sense of stability. These innovative solutions will aim to support communities in adapting to increasing environmental risks while addressing societal changes with resilience and hope.

With the submission deadline set for mid-January, staff:

- worked with CPEC to propose the above-outlined theme for the program;
- updated the SHIFT website regarding timelines, eligibility, etc.;
- developed, under CPEC guidance, a short list of potential jurors and a jury facilitator before confirming the jury and timelines;
- launched the call for submissions;

- reached out to universities, Local Societies, and architectural media to increase awareness of program; and
- engaged in the initial administration toward the SHIFT publication (with the publishers of *Canadian Architect*) and the event in Ottawa next year.

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## Update on Progress Toward Special Operational Activities or Projects

This section explores the ongoing status of specific items mentioned during Council's strategic planning session in February.

### Regulatory Information on the Website

Working with the Office of the Registrar, Communications staff audited the OAA Website to determine which previously removed LicTechOAA/OAA Technology Program (OTP) material could be potentially modified and reinstated. In preparation for limited licences and the launch of the OAA Technology Program, Communications staff have been working in close contact with the Office of the Registrar to ensure information is quickly and accurately updated for the website for the return of the program and the beginning of limited licence applications.

Beyond the addition of several pages for Licensed Technologists, Intern Technologists, and Student Technologists, as well as several subpages dedicated to the OTP, this has also meant the start of what will be a longer-term project for the website, involving the updating of language on dozens and dozens of pages to reflect the additional member type. The OAA's in-house identity guide is in the final stages of being reworked to reflect new messaging and language rules, including the capitalization of all statuses.

As well, the Mentor Directory is being updated to ensure its applicability to participants in not only the Internship in Architecture Program (IAP), but also the OTP. Thanks to intense collaboration among OAA staff, the vast majority of all required information will be accessible on the OAA Website by early January, with the remainder following thereafter.

### K–12 Big Think

Identified by CPEC as a priority audience within the public outreach plan, K–12 students, parents, and teachers have prompted the exploration of planning a second event. This event, a continuation of the original K–12 Big Think from 2023, began earlier this year in collaboration with the Toronto Society of Architects.

The TSA had posted its own [environmental survey](#) previously, and Society executives met with OAA Communications staff and the Executive Director in the fall to explore how the Association can move forward.

The decision was made not to further pursue another Big Think, recognizing that the current approach of the OAA was already the most sensible, given its areas of expertise and strategic focus as a regulator, rather than as a content developer. Consequently, the OAA will continue to support the work of other groups (whether the Societies or other third parties) by considering funding opportunities or platforming their efforts on the

website, social media, and e-communications. When possible, it will also serve as a networking enabler—for example, it connected the North Bay Society of Architects with No. 9 for possible opportunities of mutual benefit.

Additionally, CPEC used a small portion of its operational budget to trial a collaboration with Chatterhigh, an innovative educational platform specializing in career exploration through interactive digital quizzes and modules. This program offers career-path questions about the profession to high school students in school boards across Ontario, encouraging them to peruse the OAA Website.

Work with staff and volunteers to identify relevant information for inclusion on the evolving K–12 webpage also continues.

### **OAA Building Video Tour**

Working with Universus Media Group, the filming and initial rounds of edits for a series of six short films about the Association's zero net carbon headquarters have been completed. Filming took place in early October, with a crew coming to the building for principal and secondary video shoots, as well as in-depth interviews with the Executive Director, renovation architect David Fujiwara, former Building Committee Chair Sheena Sharp, lightning expert Deborah Gottesmann, and engineer Antoni Paleshi.

Working from an approved script and bringing their own perspective to the project, the experts all play an important role in raising awareness about the building for a public audience. Staff have viewed rough cuts of the footage and contributed notes regarding content and clarification, engaging edits as well from the participating subject matter experts. The videos are expected to be finalized for Council's previewing before a plan is developed on how to best share this content with a wider audience.

### **Landscape Design Competition**

As mentioned above, OAA Communications supported the Landscape Architecture Celebration event in late June. (In the first half of the year, Communications had previously assisted with the creation of the design brief, coordination of the gallery at Doors Open, the collection of information on the website [including showcasing the anonymous proposals], the facilitation of the actual digital submission process, and administration of the jury day itself.)

The Association has spotlighted the work of the selected team for the landscape project on the website and social media, and also had them present at the aforementioned NOW Lecture. Further, an episode of the podcast featured the competition's professional advisor, Joe Lobko, extolling the importance of design competitions.

Communications will continue to support the project as it moves forward, leveraging ways to raise awareness about the actual site work, as well as broader understanding among the public and media about the importance of landscape architecture (and the architecture profession's opportunity to play a collaborative role) and design competitions on a more general level. Staff will liaise closely with the Building Committee to ensure what content is appropriate to share and when, given that the design continues to evolve.

## **Work with Local Societies**

In concert with the OAA President, Association staff (specifically the Executive Director, Interim Public Outreach Specialist, and Arch Grad) continue to liaise with the Local Architectural Society chairs and Council Liaisons to further dialogue about the relationship between the Association and these important groups.

Regular virtual discussions yielded much headway in funding possibilities for Local Societies—Zoom meetings led directly to membership surveys about the importance of Societies and gauging support for different levers for funding. Long-awaited changes have now been made real for the coming year, with respect to Society dues, and further evolution is expected.

There has been deeper collaboration regarding additions to the website “toolkit,” as OAA staff continue to build out the member-side Local Society resources page and Society Handbook, eliciting feedback on which “how-to” materials would be most beneficial.

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## **Action**

None. For information only.

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## **Attachments**

None.

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# Memorandum

**To: Council**

Settimo Vilardi  
Donald Ardiel  
Jim Butticci  
Natasha Krickhan  
Michelle Longlade  
Elaine Mintz  
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Susan Spiegel  
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J. William Birdsell  
Kimberly Fawcett-Smith  
Jenny Lafrance  
Lara McKendrick  
Deo Paquette  
Kristiana Schuhmann  
Edward (Ted) Watson  
Thomas Yeung

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.1.b

**From:** Claire Hepburn, Deputy Registrar

**Date:** January 6, 2025

**Subject:** End of Year Update – Continuing Education Service Area

**Objective:** To provide an end of year update on the activities under the Continuing Education service area.

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## End of Cycle 2022-2024 and Policy Changes

June 30, 2024 marked the end of the two year cycle and there have been significant policy changes to report on. A new policy “Continuing Education Policy” (the Policy) was approved by Council in June 2024. The Policy replaced three existing Council Policies and four administrative policies, which significantly streamlined and modernized the handling of the Continuing Educations Program non-compliance.

These policy changes were brought forth in accordance with Council’s approval of a modernization proposal from the September 21, 2023 Council meeting stemming from the level of non-compliance with the 2021-2022 ConEd Cycle. Following the approval of the proposal, amendments to the *Architects Act* and Regulations were sought and, as of January 1, 2025, have come into force and effect.

To summarize, the policy changes include three significant items.

(1) *Audits*

Beginning in the 2024-26 Reporting Cycle, members are no longer required to upload proof of successful completion of a learning activity for Structured Learning Hours. This has been a source of frustration expressed by members for some time.

Members will still be required to report the hours and the title of the learning activity, however they will be required to keep all documents substantiating the member's proof of attendance at Structured Learning hours for six months after the end of the Reporting Cycle in which they were reported.

During the Reporting Cycle and up to six months thereafter, the Association may require a member to provide documents about the member's completion of the Learning hours. The onus will lie with each member to maintain this information during the ConEd cycle.

*(2) Administrative suspensions*

In accordance with the change set out in section 54 of the Regulations, the Policy sets out the circumstances under which a member would become administratively suspended. This change will apply to the 2024-26 Reporting Cycle.

Unless a member has been granted an exemption of any outstanding Learning hours the member is required to complete under this policy, a member shall have 90 days after the end of the Reporting Cycle to complete the Learning hours, failing which the Registrar may administratively suspend the member's licence or limited licence.

*(3) Amended fee for noncompliance*

In 2017, OAA Council established a tiered ConEd non-compliance fine to reduce member non-compliance with the program. The proposal arose in an effort to reduce the time consuming and costly process of administering the non-compliance procedures. There has been no evidence or data to suggest the tiered structure reduced non-compliance, in fact non-compliance steadily rose over the years. On May 21, 2024, Council approved the elimination of the tiered fee structure in favour of a consistent late fee of \$750. The Bylaws were amended accordingly.

## **Non-compliance for 2022-24: Significant improvement in compliance this cycle**

On June 30, 2024, 181 members were non-compliant and were issued a late fee. This represents a significant increase in compliance from the previous cycle, where 915 members were non-compliant at the end of the cycle. Put another way, non-compliance dropped from 19% of the profession to less than 3.5% non-compliance.

Efforts in increasing communication and sending direct messages to members, along with increased awareness of the program through a free webinar delivered to members yielded higher compliance rates.

Additionally, administrative improvements and efficiencies were introduced after the end of cycle, including the ability to keep the 2022-2024 cycle open to allow for members to complete their hours after the cycle ended. This resulted in the elimination of additional contract staff and the non-compliance administrative tasks were completed by OAA full-time staff.

As of the date of this memo, of the 181 members who were non-compliant at the end of cycle, 62 requests for relief were granted (84 were requested); 102 members have either completed their hours or are no longer active members of the OAA, 17 members will be issued a caution for non-compliance, and one member has been referred to the Complaints Committee.

## **Mandatory Continuing Education on Climate Action**

At its May 2024 meeting, Council approved a motion to continue Mandatory Continuing Education on Climate Action for the 2024–2026 cycle. Required hours will continue to be structured learning hours. Members can seek out their own learning opportunities or select from related sessions included in the OAA Continuing Education Webinar Series and the OAA annual Conference. To be eligible, the sessions must focus on topics including, but not limited to:

- Adaptive reuse;
- Deep-energy retrofits;
- Embodied carbon;
- Energy modelling;
- Energy step codes (e.g. Toronto Green Standard)
- High-efficiency wall assemblies;
- Life cycle analysis;
- Local materials and supply chains;
- Low-carbon design;

- Material reuse strategies
- Operational and embodied carbon (and offsets);
- Passive House;
- Regenerative design;
- Resiliency;
- Sustainability metrics (e.g. TEUI, TEDI, and GHGI);
- Sustainable design; and
- Zero emissions design. Climate Action hours from the previous cycle that are in excess of the requirement for the current cycle will not be carried forward. It keeping with discussion at the May Council meeting it is important for members to undertake climate action within the two year cycle itself.

### **Continuing Education Webinars Series 2024**

From January to December 2024, there were 5400 enrollments, which is a higher rate than for the same period last year (4998). There were a total of 33 webinars hosted by the OAA of which 6 webinars were offered free to members this year.

Net revenues for OAA webinars for 2024 totalled \$141,142. This represents a significant increase from last year's total amount, which was \$55,754. Total attendance numbers were 5400 and with an average attendance of 164 attendees per webinar.

Here is a list of OAA webinars offered to members in 2024:

1. Building Blocks of Innovation: An introduction to generative AI for architects.
2. Understanding your Role as a Licensed Professional
3. Reframing "The Project": Project Management and Operational Management in The Design Endeavour
4. Calculate your project's embedded Carbon in Part 9 construction with the Material Carbon Emissions Estimator (MCE2)
5. Fabrication Design & Constructability for Mass Timber Structures
6. Condos, Architects and Tarion's New Home Warranty
7. Healthy Interior Design: Lessons learned from a pandemic
8. Building the Business Case to Build Sustainably
9. Build Climate Smart – Preparing Canada's Built Environment for Climate Change
10. Embracing Digitization and AI in Architecture
11. Architects and Prompt Payment (under the Ontario Construction Act): How does this affect your practice?
12. Architects and Adjudication (under the Ontario Construction Act): How does this affect your practice?
13. Building Reuse, Embodied Carbon & Climate Action
14. The Franklin Flats Story: Innovative, Low-Carbon Strategies for Affordable Housing
15. ISO 19650 for Architectural Companies
16. Addressing load management challenges for the "new load" profiles of energy efficient homes
17. Communicating the Value of Design in Architecture



18. Canadian Standards Association
19. Low Carb Design - Embodied Carbon: What is it and how architects can reduce it?
20. Simplified & Sustainable Acoustic Solutions for Mass Timber Buildings
21. Making succession work for your firm
22. Council Elections 101: Learn About Becoming an OAA Councillor
23. Barrier-free, Accessible or Inclusive Design
24. Usage of AI and IR Imaging in Energy Efficient Retrofits
25. Navigating Ontario's new 2025 Building Code
26. Electronic Document Authentication Requirements
27. Access to CSA Modular Construction Standards
28. The Narrative Blueprint: High Impact Storytelling for Architects
29. Practically Magic: Practical applications for AI in Arch.
30. Carbon and Net Zero in the Low Rise Residential Sector
31. A Specification Based Approach to Embodied Carbon
32. IFT, that's it!!! Except for Addendums!
33. Commissioning 101: an introduction for architects

### Call for 2025 Webinar and Conference Proposals

A joint call for proposals for Spring 2025 Webinars and the 2025 Conference was issued earlier this fall and we received over 90 proposals. The Continuing Education Advisory Group has reviewed the submissions received and approved the following sessions for conference:

1. **Opening Plenary**- *Transforming Communities through a Participative Design Process*, Jan Knikker, Partner, Director, Strategy & Development, MVRDV
2. **Closing Plenary**- *Reimagining Heritage: A Net-Zero Indigenous Cultural Space*, Camille Lewis, Associate, Conservation Architect, CSV Architects, Darryl Hood, Principal Architect, CSV Architects
3. *The Importance of R+D in Architectural Practice*, Yew-Thong Leong, Associate Professor, Toronto Metropolitan University, Dr. Kat Martindale, Associate Lecturer of Research in Practice, University of Nottingham, UK
4. *Carbon Literacy for Sustainable and Low Carbon Buildings*, Breanne Belitski, Co-Founder, Heavy Climate Consulting, Mike Taylor, Professor Architecture and Sustainability, Humber College/ Heavy Climate Consulting
5. *Achieving Universal Accessibility in Heritage Buildings*, Stefan Abidin, Principal, HOK
6. *Reforming Procurement - A Grassroots Initiative*, Toon Dreessen, President, Architects DCA Inc.
7. *How to apply OBC Part 11 to your projects*, Megan Nicoletti, Partner, CodeNext Inc.

8. *The office-to-residential conversion solution*, Steve Paynter, Global Building Transformation & Adaptive Reuse Leader, Gensler, Charmaine Lam, Technical Designer, Gensler
9. *True-Identity Branding: Leveraging Your Firm's Leadership*, Ian Chodikoff, Founder, Chodikoff & Ideas
10. *Transformations and Embodied Carbon Strategies*, Sanne van der Burgh, Associate Director, Head of MVRDV NEXT, Architect, MVRDV
11. *Low-rise infill, walkable and complete neighbourhoods*, Rosaline J Hill, Principal Architect & Senior Planner, Catherine McKenney, Political Liaison, City Shapes
12. *Accessibility Best Practice: Experience the difference*, Julie Sawchuk, Principal, Sawchuk Accessible Solutions
13. *The University as a City Builder*, Alar Congrats, Principal, Project Architect, Kongrats Architects, Sarah Birtles, Senior Planner, Infrastructure Planning, University of Toronto Faculty of Arts & Science
14. *Zibi Common: A Model for Sustainable Urban Living*, Sean Lawrence, Partner, Kohn Partnership Architects Inc.
15. *Social Media for Architects*, Dory Azar, Architect, Dory Azar Architect Inc.
16. *From Blight to Light: Homeless Housing for Urban Renewal*, Nerin Kadribegovic, Founding Principal, Kadre Architects
17. *David vs Goliath*, John Hackett, Salvador Knafo, Philip Ghosh and Leslie Parker, Pro-Demnity
18. *Detroit Arising*, Dorian Moore, Architect/ Urban Designer/ Partner, Archive DS
19. *Regenerating Ottawa's West Memorial Building*, James Rice, Principal, Kasian Architecture, Emmanuelle van Rutten, Partner, Moriyama Teshima Architects, Ronen Bauer, Partner, Moriyama Teshima Architects
20. *Designing for a Climate-Positive, Inclusive Future*, Bruno Weber, Partner, KPMB Architects, Brian Porter, Architect, Two Row Architect, Dan McTavish, Associate Principal, Design Principal, Perkins&Will
21. *The Canadian Canoe Museum- A Case Study*, Carolyn Hyslop, Executive Director, Canadian Canoe Museum, Jeremy Ward, Curatorial Director, Canadian Canoe Museum, Michael Gallant, Design Principal, Unity Design Studio, Bill Lett, Managing Principal, Unity Design Studio
22. *Kiweki Point – Big River Landscape*, Janet Rosenberg, Founding Principal, Landscape Architect, Janet Rosenberg & Studio Inc. (JRS), Wayne Swanton, Managing Principal, Landscape Architect, Janet Rosenberg & Studio Inc (JRS), Garry Meus, Senior Landscape Architect, NCC, Greg Boothroyd, Principal, Patkau Architects
23. *Designing the high heritage spaces of Centre Block*, Pascal Letourneau, Architect Principal, DFS Inc.
24. *The Medicine Wheel as Monument*, Christine Leu, Partner, LEUWEBB PROJECTS, Adrian Stimson, Artist
25. *TEUI3, Expanding our Options in Low Carbon Design*, Andy Thomson, Director, Thomson Architecture, Inc.
26. *Lines We Draw*, Paul Backewich (Sketching Session), Paul Backewich, Senior Architect, Calnitsky Associates Architects

The following webinars have been approved and scheduled for 2025:

1. Designing Futures: Biophilic Architecture and Sustainable Well-being in Educational Spaces
2. Massive Passive: Innovations in Affordable Housing through Mass Timber Passive House Construction
3. Effective Project Planning for Tall Timber Residential Buildings
4. OBC Matricies
5. Building Food: programming nature and food within the built environment
6. Firm Value and Succession Planning
7. Natural Materials: A New Diet for Architecture
8. Beauty in Architecture: The Role of Aesthetics in Building Design
9. Understanding your rights and obligations under the Occupational Health and Safety Act
10. Tips & Tricks for Building a Cyber Resilient Organization
11. Adaptation of AI and IR Imaging in Energy Audits & Targeted Retrofits
12. Know Your Impact: Findings and Outcomes from the Carbon Coalition Conference
13. The Masterpiece: Development Infill Heritage
14. The Role of Architecture in Shaping Equitable Communities

Additional webinars will be scheduled for the remainder of the year after a call for proposal, set to be issued in Spring, 2025.

#### **Online Course “Fundamentals of Running an Architectural Practice”**

In partnership with the University of Toronto (U of T), the OAA's *Fundamental's of Running and Architectural Practice (FRAP)* is offered twice a year. The course is eligible for 31 structured learning hours under the OAA Continuing Education Program.

The 2024 winter semester had 38 participants. The enrollment date for the 2024 Fall FRAP course had 26 participants.

This summer, the annual course content will be reviewed and updated. The Continuing Education staff is developing a roster of substitute subject matter experts, who will be engaged in teaching the course in cases when the assigned SME is not available to lead a webinar.

OAA staff and U of T continuing studies administrators meet once a month to address any ongoing matters with FRAP.

#### **Admission Course**

The OAA Admission Course is a mandatory requirement for licensure for all Intern Architects in the IAP. The course is offered in partnership with the University of Toronto, School of Continuing Studies.

The online course is offered three times a year, the Winter Semester, (from January 8 – March 10) with 173 enrolled, and the Spring Semester, (from April 1 – June 2) with 119 enrolled; and Fall (September 30, 2024 – December 1, 2024) with 76 enrolled, for a total of 368 participants.

This summer, the annual course content was reviewed and updated. The Continuing Education staff has developed a roster of substitute subject matter experts (SMEs), who will be engaged in teaching the course in cases when the assigned SME is not available to lead a webinar.

### **Self-Study Learning Series**

The Self-Study Series, offered by U of T is a self paced learning opportunity using the foundational practice material from the OAA Admission Course. In 2024, there were 121 participants in the Self-Study Series.

### **OAA Conference 2024 in Niagara Falls**

The 2024 Conference was a resounding success with 719 registrants.

The Call for Presenters started in June and ended on October 10. Over 80 proposals were received from OAA members, third party organizations, and members of the public in Canada, the United States and abroad.

The Continuing Education Advisory Committee vetted proposals and curated sessions to finalize 63 sessions with over 90 speakers for the 2024 OAA Conference.

Speakers include 51 OAA members, and international speakers from Vienna, Rotterdam, Denmark, the United Kingdom and the United States.

Experiential Learning provided extended Continuing Education credits to members in sessions off-site. This included two to eight hours of learning. The majority sold out before the conference date.

New this year was the inclusion of attendee barcodes to be scanned before entering their selected sessions.

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### **Action**

None. For information only.

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### **Attachments**

None

# Memorandum

**To: Council**

Settimo Vilardi	Loloa Alkasawat
Don Ardiel	J. William Birdsell
Jim Butticci	Kimberly Fawcett-Smith
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paguette
Anna Richter	Kristiana Schuhmann
Susan Spiegel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.1.c

**From:** Melanie Walsh, Manager Finance

**Date:** January 6, 2025

**Subject:** Year-end Operational Plan update

**Objective:** To provide an update regarding the activities undertaken in relation to the Operational Plan for the Finance service area

This report is the second of two semi-annual updates on the 2024 activities in the Finance service area, including progress made in relation to operational priorities for 2024, as discussed with Council at last February's planning session.

## Update on Program(s)/Services

### *Annual Budget Development*

- The OAA 2025 Budget has been completed and approved.
  - The 2024 draft budget was presented to Council on September 19, 2024 for review and the final budget was presented and approved December 6, 2024.

### *Annual fee renewals:*

- Annual fee renewals process opened on schedule early-December with approved fees as included in the 2025 budget.
- This process also included updating of the society membership dues as agreed to by the individual Societies and administration of those dues along with the fee renewals.

**Annual audit:**

- Mid-fall, Finance staff were focussed on the transition to a new Auditor – BDO, as approved by Council. The transition went well and pre-audit work was completed for the 2024 year-end audit on schedule.
- Work is underway to be ready for the audit field work which will commence January 27, 2025.

**Update on Progress towards special operational activities or projects**

***Implementing Electronic Payment Options***

- The OAA now offers the ability to both receive payments and pay invoices by Electronic Fund Transfers, as well as pay invoices and expenses through e-Transfers.
- The OAA has also made a process change where invoices over \$20k are paid electronically when available, eliminating the requirement to courier cheques for signature. This new process continues to function in accordance with the necessary checks and balances as provided for in the OAA's Delegation of Authority Policy.

***Implementing New Process for Outstanding Accounts Receivable***

- In response to the growing number of outstanding accounts receivable, the OAA has implemented two new processes;
  1. Automated account receivable email, sent monthly to individuals and practices with outstanding webinars and orders. Annual fees are handled separately. Since implementing in October, the OAA has seen a 25% decrease in Accounts Receivable.
  2. Operational policy for webinar registrations, to ensure payment is received prior to attending. Since implementing in late October, the OAA has recognized a 55% reduction in unpaid webinars.

***OAA Database and Finance upgrades***

- OAA Finance staff will be working closely with IT staff over the coming months as we prepare for an upgrade of the OAA IMIS database. This upgrade will make for important improvements in the Finance service area in terms of processing, tracking and reporting.

***Updating format for the Examination for Architects in Canada (ExAC) annual budget***

- ExAC budget process has been streamlined and updated. The ExAC fiscal year was also aligned with the OAA's.
- As a reminder, the OAA is responsible for management and administration of the ExAC finances on behalf of ROAC.

### **3 year plan to reallocate unrestricted reserves**

- The Finance & Audit Committee continues to focus on ensuring that reserve fund balances are compliant with CRA and OAA policies, as well as sufficient to cover upcoming approved capital projects.
- Finance staff have established an internal tracker to monitor the 3 year plan reallocation as approved by Council and is monitoring it on a regular basis and in anticipation of a mortgage pay down in 2026.

### **Conference Barcode Scanning**

- Finance staff, in collaboration with IT, implemented a barcode scanning system to replace Conference tickets. To enter a Conference event or session, registrants would present their badge, either printed or through the newly implemented Conference Web App, for scanning at the door. Scanning the badges barcode is also allowed for their attendance to be uploaded to their Continuing Education transcripts on their behalf. This new process also eliminates the requirement of individual tickets being printed and further supported our sustainable initiative.

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#### **Action:**

None. For information only.

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#### **Attachments**

None

# Memorandum

**To: Council**

Settimo Vilardi	Loloa Alkasawat
J. William Birdsell	Jim Butticci
Kimberly Fawcett-Smith	Christina Karney
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Greg Redden
Anna Richter	Kristiana Schuhmann
Susan Spiegel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.1.d

**From:** Kathy Armbrust, Chief Operating Officer

**Date:** January 3, 2025

**Subject:** Semi-Annual Update from Operations & Administration

**Objective:** To provide Council with an update regarding activities under Human Resources, Operations and Administration for June 1 – Dec 31, 2024

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The following activities occurred in the second half of 2024 under Human Resources, Operations and Administration.

The schematic design of the Presidents Wall was completed. Regarding the Landscape Project, Armbrust supported the Building Committee to:

- organize the Landscape Jury Day and the corresponding announcement events for the winning design
- engage the winning designers, Ja Architecture Studio, and then a Client Representative, Joe Lobko
- create an issues list and review the evolution of the updated Schematic Design
- put together the RFP process for the Construction Manager and engage Somerville Contract accordingly

Further steps were taken on the Multi-Year Roadmap plan:

- Regarding succession planning for the Executive Director, a Transition Plan has been established. Most of the action items related to the Transition Plan can only be done once Doyle gives notice of retirement. Where possible, action items have been proactively completed.
- Weekly internal Peer-to-Peer training covered a variety of topics including Government expectations for Regulatory Bodies and the Occupational Health and Safety Act etc.



- Job Descriptions have been updated in accordance with recommendation from the Operational Review
  - The following have been created/updated in response to the Operational Review and in accordance with best practices as well as changes to the law:
    - o Staff Policies: Recruitment, Anti-Discrimination, and Health and Safety
    - o Council Policies: Respectful Workplace Policy and Policy for Compliance with Duties of Members of Council
  - The following role was filled: Human Resources Coordinator
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**Action**

None. For information only.

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**Attachments**

None

# Memorandum

**To:** Council

Settimo Vilardi	Loloa Alkasawat
Donald Ardiel	J. William Birdsell
Jim Butticci	Kimberly Fawcett-Smith
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Spiegel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.1.e

**From:** Abhishek Chaudhary, Information Technology Manager

**Date:** January 2, 2025

**Subject:** Information Technology service area – End of the year update

**Objective:** This memo is the second of two semi-annual updates on 2024 activities in the OAA's Information Technology service area, including progress on the operational priorities discussed with the Council at the last planning session.

## Office 365 Upgrade and Data Migration

We have completed the initial two phases of the Office 365 project and are nearing completion of Phase 3, which focuses on implementing the SharePoint Online intranet solution.

### Key Highlights:

- **Assessment and Planning:**
  - Conducted a comprehensive assessment of the existing content management environment to identify gaps and requirements for the SharePoint Online intranet deployment.
  - Engaged with all service areas to understand their specific use cases, challenges, and objectives.
  - Evaluated project constraints and risks from both business and technical perspectives.
- **Development and Design:**
  - Defined functional requirements, solution design strategies, and solution architecture for the SharePoint intranet.
  - Designed and built SharePoint employee experience portals, including branding, navigation, content pages, audience targeting, news sources, and integrated Viva Connections & Teams policies.
- **Implementation and Testing:**
  - Created SharePoint sites, document libraries, and content pages with structured content classification and governance.
  - Conducted initial System Integration Testing (SIT) to validate the overall solution.
  - Migrated initial data to respective SharePoint sites.

- Final meetings with service areas are underway to review and finalize sub-sites, validate data migration, and confirm user access permissions.

### **Windows 11 Upgrade**

Successfully migrated all users from Windows 10 to Windows 11, ensuring seamless functionality and enhanced performance across the organization.

### **iMIS Upgrade to the Cloud**

In Q4, the OAA launched a new cloud-based EMS instance of iMIS in collaboration with ASI.

#### **Key Achievements:**

- Replicated the 2017 version of iMIS within the EMS framework, removing non-compatible components.
- Initiated redesign and redevelopment of these components using advanced tools and features available in the new cloud-based instance.

### **PCS Program Launch**

During Q3 and Q4, we successfully launched the in-house developed PCS Program within iMIS, streamlining processes and improving member interactions.

### **Upgraded Antivirus System to Sentinel One**

In 2024, we enhanced our cybersecurity defences by upgrading the organization's antivirus system to **Sentinel One**.

- This next-generation solution leverages artificial intelligence for advanced threat detection, rapid response, and proactive endpoint protection.
- The upgrade ensures a more robust security posture, safeguarding critical systems and sensitive data.

### **Other Ad-Hoc iMIS Initiatives**

- **KOPC (Competency Logging Portal):**
  - Developed forms and portals akin to CERB to log member experience related to specific competencies.
- **OTP (Technologist Member Portal):**
  - Created a system replicating CERB for technologist member types, including reviewer portals, staff processing pages, process automation, and reporting tools.
- **Introduction to Online Applications:**
  - Collaborated with BSI to analyze and compare application setups across organizations.
  - Provided BSI with a detailed comparison of OAA's application types to inform future enhancements.
- **Conference Application:**
  - Developed a web-based itinerary and badge system for members.
  - Enabled members to access their badges and conference details via mobile devices, eliminating the need for printed materials.
- **Automated email delivery and Automation**
  - Using the iMIS-based AEM and Process Automation, we created around 75 fully automatic emails that go out to the membership. These emails include Finance invoices, Accounts Receivable, PCS, CERB, ERB, Intern/Student Applications, Coned

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### **Action**

None. For information only.

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**Attachments**

none

# Memorandum

FOR COUNCIL MEETING

January 23, 2025

(open)

ITEM: 7.1.f

**To: Council**

Settimo Vilardi	Loloa Alkasawat
Donald Ardiel	J. William Birdsell
Jim Butticci	Kimberly Fawcett-Smith
Natasha Krickhan	Jenny Lafrance
Michelle Longlade	Lara McKendrick
Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Spiegel	Edward (Ted) Watson
William (Ted) Wilson	Thomas Yeung
Marek Zawadzki	

**From:** Sara Trotta, Manager, Policy and Government Relations

**Date:** January 3, 2025

**Subject:** 2024 End of Year Operational Plan Update: Policy and Government Relations

**Objective:** To provide Council with an update regarding activities undertaken in relation to the Operational Plan by the Policy and Government Relations service area.

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This memo is the second of two semi-annual updates on 2024 activities in the OAA's Policy and Government Relations (PGR) service area, including progress in relation to the operational priorities discussed with Council at the January 2024 planning session. This does not include items that are under the mandate of the Policy Advisory Coordination Team (PACT).

- **Legislative and Media Monitoring Strategy:** PGR continues to carry out its legislative and media monitoring activities with the assistance of Google alerts. This tool offers a cost-effective and efficient solution that is integral to the work of the PGR service area.

During the second half of 2024, the PGR team has leveraged Google alerts to monitor new and emerging issues, such as municipal renovations bylaws, single egress in small apartment buildings, and ongoing changes to FARPACTA.

- **Queen's Park Picks Refresh:** The 2024 QP Picks refresh was a huge success. In addition to returning to an in-person event, the QP Picks leveraged the 2024

Conference theme. Unlike past years, in 2024 MPPs were asked to nominate a housing project in their riding for consideration as a QP Pick.

Some key highlights from the event include:

- Receipt of 32 building nominations from 29 MPPs spanning across Ontario;
- Full 25% of MPPs and/or their representatives in attendance at the event, with many MPPs spending the entire evening with the OAA;
- Official remarks delivered by key delegates including Honourable Doug Downey, Attorney General, MPP Kristyn Wong-Tam, Official Opposition Critic of the Attorney General, and MPP Mike Schreiner, Leader of the Green Party of Ontario;
- 11 MPPs requested meetings with the OAA. 9 MPP meetings were held, with the remaining requests to be fulfilled in the new year due to various scheduling issues;
- Significant earned media attention about the QP Picks event, especially from the North Bay region which showcased the Suswin Village pick. QP Picks was also featured in the *Queen's Park Observer*, a newsletter that goes out to anyone following activities at Queen's Park;
- Social media about the event was also significant this year. Notably, the Attorney General and MPP Kristyn Wong-Tam posted about the event and, given their large following, this expanded the reach of the QP Picks;
- Website traffic to [www.oaa.on.ca/qpp](http://www.oaa.on.ca/qpp) was also high, with 3700 views of the page following the October 23, 2024 release of the QP Picks. In addition, for the first time, a gallery of photos from the event was featured on the OAA website.

Perhaps most notable at this year's event was the opportunity to host the Attorney General and key members of his staff. In addition to the formal remarks that were delivered by him, Mr. Downey spent significant time talking with OAA President, Executive Director, and members of staff about a variety of topics.

- **Support – Office of the Registrar/Executive Director:** In addition to the regular legislative monitoring that PGR staff does, the PGR service area has been working closely with the Office of the Registrar (OTR) to monitor the changing legislative and regulatory environment, especially as it pertains to compliance with FARPACTA as well as amendments to the *Architects Act*.

Most recently, government introduced and very quickly passed Bill 218, the *Honouring Veterans Act, 2024*. Schedule 2 of this legislation amends FARPACTA to mandate that, "a regulated profession shall make a registration decision within 30 business days after receiving an application for registration from a domestic labour mobility applicant and everything required by the

regulated profession in respect of the application, or within such time as may be prescribed for a prescribed class of applicant...”.

Bill 218 received Royal Assent on November 19, 2024 and, with that, Schedule 2 is now in force.

Government also introduced Bill 227, *Cutting Red Tape, Building Ontario Act, 2024* on November 20 and passed on December 3. This omnibus Bill contains, among other changes, amendments to the *Architects Act* to make explicit that the new Occupancy Type G, defined in the 2024 edition of the Ontario Building Code, is within the protected scope of architects (and engineers). This amendment comes into force on January 1, 2025, the same day that the 2024 Ontario Building Code is implemented.

In the second half of 2024, PGR staff continued to work with the Executive Director and Registrar in relation to the draft amendments to Regulation 27 under the *Architects Act* regarding limited licenses. Those amendments were filed in December.

As PGR Manager I have been involved in a number of meetings focussed on policy matters as well as relationship building. Most notably PGR staff and the Executive Director met with the CBO and other representatives of the City of Toronto to discuss the City’s ‘renoviction bylaws’ including architects as ‘designated individuals’. The OAA worked in cooperation with our counter parts at PEO to advance a common position.

- **Policy Support – Practice Advisory Services:** PGR staff continued to work collaboratively with Practice Advisory Services (PAS) to respond to the ongoing consultations on the harmonization of the Ontario Building Code with its National Code counterparts. PGR staff provides support for policy considerations and engages with the Climate Action Advisory Group for their input on elements of the consultations pertaining to Climate. During this reporting period, two additional consultations have occurred:
  - [CBHCC Phase 6 Consultation on Code Harmonization](#); and,
  - [CBHCC Phase 7 Consultation on Code Harmonization](#).

These consultations were led by the PAS team with support from PGR (in consultation with the Climate Action Advisory Group).

Although there were tight timelines on both consultations, staff from PAS and PGR have worked closely to develop a strategy for engagement of the Building Code and Climate Action Advisory Groups to leverage the knowledge and skills of these volunteer groups in an efficient and effective manner. Tactics, including a kick off meeting as well as additional working meetings where volunteers can work collaboratively on suggested changes, have helped to streamline the consultation process and ensure that deadlines are met.

- **Briefing Notes and Backgrounders:** PGR staff continue to develop briefing notes and backgrounders for new and ongoing issues and positions that the OAA is advancing. In the second half of the year, efforts have been focused on updating and adapting the backgrounder on Schedule G of the *Condominium Act* for use during MPP meetings. Given that the policy ask to amend Schedule G in order to contemplate building conversions is a very precise ask, the backgrounder was an effective tool to engage MPPs about this important issue.

Additionally, having backgrounders about other key policy pieces was instrumental for relationship stewardship with government in the last few months. Backgrounders that were used to support discussions that PGR staff had with elected officials and government staff include backgrounders on:

- Energy step code; and,
- Housing affordability.

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**Action**

None. For information only.

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**Attachments**

None.



# Memorandum

**To: Council**

Settimo Vilardi	Loloa Alkasawat
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Kimberly Fawcett-Smith	Jim Butticci
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FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.1.g

**From:** Mélisa Audet, Manager, Practice Advisory Services (PAS)

**Date:** January 14, 2025

**Subject:** OAA Service Area Semi-Annual Updates - Practice Advisory Services.

**Objective:** To provide Council with an update regarding activities undertaken in relation to the Operational Plan by the Practice Advisory Services area.

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## Report – Practice Advisory Services (June 1, 2024 to December 31, 2024)

This memo is the second of two semi-annual updates on 2024 activities in the OAA's Practice Advisory Services (PAS) area, including progress made in relation to operational priorities discussed with Council at last February's planning session.

### Updates - Main Program and Services supporting Member Competency

#### Practice Hotline – January 1 to December 31, 2024

The Practice Hotline is an important service to assist staff in mapping industry trends, feeding into the creation of resources for members, and in bringing forward topics to the Continuing Education team. PAS received ~1,715 calls/emails in 2024. (Note: This may include multiple calls/emails about the same topic).

Calls are primarily coming from licensed members (~80% +), most of the remaining are 9% clients, 3% Building Officials and 2% Intern Architects. Emails are primarily coming from licensed members (~70% +), the remaining identified sources are 5% building officials and 4% clients. "Other category" which includes emails re-directed to other service areas at the OAA amounted to ~12% of emails.

## Other observations for 2024:

- The top 2 topics (all users) were related to the *Architects Act & Reg.27* (about 20% of the calls and 25% of the emails) and “General Practice” questions (about 14% of the calls and 12% of the emails).
- Questions related to contracts and RFPs tracked high in email correspondence (each about 8% of the ~530 emails addressed).
- The topic of “Construction Contract Administration” accounted for 7% emails and 11% of calls handled.

Practice Advisory Newsletters (Bi-monthly)

With the assistance of Communications, PAS prepared 6 editions for the year (Jan., March, May, July, Sept., and Nov.). Each newsletter was emailed to an average of 7,920 recipients including architects and interns, as well as student associates. The ‘open rate’ for the 6 editions this year was close to 67.5%, which closely aligns with what was observed in 2023.

RFP Reviews & Public Outreach

## Key observations since January 1, 2024:

- 43 RFPs and/or Suppl. Conditions documents were brought forward for review from both OAA members and client groups. The latter often resulted in meetings between PAS and individual client groups to discuss upcoming projects, including information on the role of OAA members, key sections of the *Architects Act*, etc . Some discussions also resulted in organizing education sessions (see below).
- It should be noted that there remains the issue of the time span between when RFPs are brought to PAS’ attention and the closing date of the RFPs often being too short for PAS to take effective action prior to closing.
- 0 RFP Alert was issued in 2024 following discussions with both entities.
- The majority of the RFPs originated from municipalities, schoolboards, colleges and universities.

To compliment RFP Reviews, PAS has been proactive in educating client groups based on recurring themes/topics observed in RFPs, Supplementary Conditions, Hotline calls/emails, etc. Two webinars were presented in 2024:

- “*A brief Introduction to OAA 600-2021A – A standard Form of Contract for Architectural Services*” (Feb. 29, 2024)
- “*Public Procurement: The OAA & Standard Form Contracts for Architectural Services*” (Sept. 6, 2024)
- Audience for both webinars were client groups in the healthcare field and were composed of project managers, procurement staff, managers, etc.
- They were also opportunities to extend a dialogue with clients and create an opportunity to discuss items such as: how to optimize RFPs for professional services as well as covering the role of the OAA as a regulator.

## Standards Access Program: CSA

As indicated in the June 2024 mid-year report, PAS renegotiated a one (1) year contract, effective as of June 1, 2024 and ending on May 31, 2025. The program remains essentially the same, while additional standards were added to the [OAA-NBC/OBC Standards Collection](#), arising from feedback from members at large, Practice Resource Committee and to reflect trends in the industry.

PAS worked with the Continuing Education team to organize a webinar in October 2024 entitled *Access to CSA Modular Construction Standards* which had a segment on how to sign-up to the program. The webinar had a minimal impact on new sign-ups for the program, however it did align with a bump in product usage.

Each account held by a licensed member may represent up to an additional 9 users. The number of primary accounts has decreased by 11% from 2023, currently standing at 390 accounts as of the end of December 2024. As renewal for 2025-2026 comes up in first quarter of 2025, PAS will account for this during the contract review exercise. This year will also mark the fifth anniversary of this program.

PAS continues to monitor the program renewal rate, which currently stands at 51%. Although the number of accounts/users has decreased over the years, there has been an increase in product usage of 12% from 2023. Approximately 78% of the 191 available standards in the collection were accessed at least once in 2024.

The 5 most accessed standards in 2024 were:

- CSA B651:23 Accessible design for the built environment
- CSA B44:22 Safety code for elevators and escalators
- CSA S304:24 Design of masonry structures
- CSA S478:19 (R2024) Durability in Buildings
- CSA A460:19 Bird-friendly building design

## OAA Document Maintenance (Including Updates to Practice Tips)

As reported earlier in 2024, PAS continued to work on implementing new processes to more effectively respond to legislative changes, identify gaps in best practices tools, as well as strategies for identifying needs and coordinating with other service areas which affects the documents maintained by PAS. PAS continued to work on improving tracking tools for better reactivity to items such as legislative changes.

The first group of documents being reviewed are the Practice Tips and OAA Contracts. This work will continue in 2024-2025, with the intent of creating some messaging about the “refreshed” PTs in upcoming Practice Advisory newsletters.

- Update to Practice Tip PT.25 on Design-Build: The launch of the [OAA Contract Suite 2021](#) resulted in a need to update parallel resources on the OAA Website. [Practice Tip PT.25 Design-Build: OAA 600 – 2013](#) was identified as one of them. Since this Practice Tip provides a template for amendments to the OAA's standard form of contract when the design-builder is the client, legal input was

required. The content for this resource is organized to work alongside the OAA 600-2021 Contract and Guide, therefore requiring a reorganization of the information to match the new contract structure. The new resource was presented to Council at the September Meeting and was featured in the September 2024 edition of the OAA's Practice Advisory Newsletter.

- OBC Matrices Updates & Associated Resources: Given the launch of the new OBC 2024 earlier this year, the data matrices had to be reviewed to determine any updates needed. PAS worked with PRC. Comments received have been used to update the matrices, including a new Part 2 OBC Matrix to address the new Occupancy G Farm Building. The revised files were uploaded to the OAA website and a communication plan will be deployed to advise members of the updates, including the transition period between OBC 2012 and OBC 2024:
  - [PT.03 Building Code Data Matrices](#)
  - [PT.35 OBC Importance Category and Seismic Restraint](#)

PRC has also started to review the other OBC impacted Practice Tips such as Practice Tip 8, PT 36 Series, etc. Additional updates will be provided to Council via PRC reports in 2025.

- Other updates: PAS has also started assessing the impact of the updates to Regulatory Notices, updates to the *Construction Act*, etc. – Refer to “Special Operational Projects” section below.

#### Practice Consultation Services (PCS) Program - Updates:

Now integrated with OAA's IMIS database, the online questionnaire “pilot phase” was launched in August 2024 with the assistance of the Executive Director, Office of the Registrar, Communications, and IT. As of December 2024, 60 practices (both 10 years and new practices) have completed the questionnaire in its new format.

In parallel to the launch, the team is working on different maintenance and administrative tasks such as updating hyperlinks to updated resources (i.e. Regulatory Notices & OBC Impacted Practice Tips, amongst others), adjustments to the policy documents, creation of an operational manual, etc.

#### Creation/Participation in OAA Webinars – in 2024:

As an important component of member competency (refer to OAA Strategic Priorities), PAS continued to work closely with the Continuing Education team to highlight webinar topics ideas. The ideas typically stem from discussions at Practice Resource Committee, as part of the launch new/updated OAA resources, and via conversations/emails received on the Practice Hotline.

Here is a short list: *Understanding your Role as a Licensed Professional* (Jan. 25), *Condos, Architects, and Tarion's New Home Warranty* (Feb. 22), *Architects and Prompt Payment (Under the Ontario Construction Act): How Does This Affect Your Practice?* (April 4), *Architects and Adjudication (Under the Ontario Construction Act): How Does*

*This Affect Your Practice?* (April 11), *Role of CSA/ASC B651:23 Standard in Building a Barrier Free Canada* (May 30), *Access to CSA Modular Construction Standards* (Oct. 10).

PAS also provided assistance to the “Fundamental of Running a Practice” course as well as the OAA Admission course. This includes being a subject matter expert for the webinars, reviewing lists of resources for the attendees, updating some of the course material annually, etc.

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## **Update on Progress Toward Special Operational Activities or Projects**

OAA Contract Suite 2021: Licensed Technologist Versions and Other Updates: In anticipation of the changes to the *Architects Act*, PAS worked with the Office of the Registrar to make some updates to guides as well as prepare a version of the contracts for use by licensed technologists. The files are expected to be uploaded in January 2025.

Launch of Ontario Building Code 2024 & Transition Period, including new Occupancy G Farm Buildings: (refer to updates above)

Public Reviews – Second Half of 2024: With the assistance of an OAA Advisory Group and the Policy & Gov. Relations (PGR) team, a submission was completed in December 2024 for the [CBHCC Consultation on Changes to the National Building Code and National Plumbing Code – Fall 2024](#).

IO Supplementary Conditions to OAA 600-2021: PAS staff were heavily involved in the review and discussions related to IO’s new set of supplementary conditions to their standard consultant agreement, the foundation of which is OAA 600 -2021.

Updates to the *Construction Act* in 2025: New legislation will come into effect in Spring 2025. With the assistance of the PGR team and external legal counsel, a preliminary exercise has started to assess the impact on the [Practice Tip PT. 10.0 Series Construction Act / Construction Lien Act](#) and the OAA Contract Suite 2021 & Guides.

Updates to OAA/OGCA Document 100-2018 (Take-Over Procedures): As part of general maintenance of documents, the OAA and OGCA are finalizing the proposed edits to [Document 100](#). OAA awaits feedback from OGCA’s AGM in September 2024. Delays have occurred and this is now targeted for completion in 2025.

Launch of Updated CCDC Contracts & Impact on Resources - Ongoing: PAS continues to monitor the release of updated CCDC Contracts and Guides. We anticipate the need to edit multiple Practice Tips and other resources.

PAS Server Migration & Updates: The PAS Team spent considerable time, specifically in the second half of the year, re-organizing and culling electronic files in anticipation of the move to Sharepoint and Office 365.

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## **Action**

None. For information only.

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**Attachments**

none.

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# Memorandum

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FOR COUNCIL MEETING  
January 23, 2025  
(open)  
ITEM: 7.2

**From:** Melanie Walsh, Manager Finance

**Date:** January 10, 2025

**Subject:** Conference 2025 Update

**Objective:** To provide an update on the status of Conference 2025.

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This memo provides a brief update on planning regarding the OAA's annual Conference, which will be held in Ottawa from May 14 to 16, 2025. It includes information on off-site venues for events taking place away from the Westin Ottawa hotel and convention centre, as well as discussion on budgets and sponsorship.

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## Off-site Venues

### Joint Local Society and OAA Opening Party

The Ottawa Regional Society of Architects (ORSA) will host the Opening Party in cooperation with the OAA on Wednesday night of Conference. ORSA, in collaboration with the OAA, has selected the **Ottawa Art Gallery** as the venue. The Alma Duncan Salon has been selected as the space within the Gallery, which includes use of the Sky Lounge, South Terrace, and North Terrace.

### Archifête

Scheduled to start at the conclusion of the SHIFT2025 Challenge presentation held at the Westin Ottawa on Thursday, the **Canadian Museum of Nature** is the location for this year's Archifête. The main space is the Rotunda room, with use of the Fossil Gallery and the Water Gallery.

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### **2025 Conference Budget**

Both OAA staff and MCC Event Planners are dedicated to negotiating and entering into the necessary contractual arrangement within the approved Conference budget for 2025. Considerable attention is being paid to the budget and historical expectations to ensure registrants have the best experience possible.

### **2025 Sponsorship**

The 2025 sponsorship sales campaign began at the end of October 2024. To date, sponsorship commitments are \$238,995, and payments of \$25,425 have been received today against an aggressive budget of \$300,000.

### **Keynote Speaker**

Refer to the report from the CPEC and Vice President McKendrick in regards to details of the Keynote Speaker for 2025.

### **Communication and Registration**

As we move into 2025, communication to members will ramp up as well as details on the OAA Website. It is anticipated that Conference Registration will begin the week of March 17.

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### **Action:**

None. For information only.

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### **Attachments**

None