



Ontario Association
of Architects

VISION

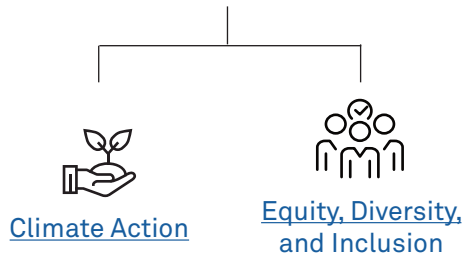
An Ontario in which architects are valued contributors to society, by creating a safe and healthy built environment that performs at the highest levels and elevates the human spirit.

MANDATE

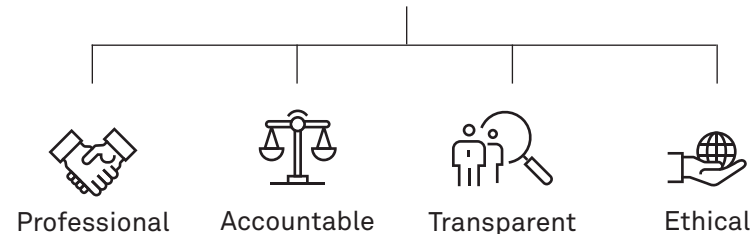
To regulate and govern the practice of architecture in Ontario in the service and protection of the public interest in accordance with the *Architects Act*, its Regulations, and Bylaws; to develop and uphold standards of skill, knowledge, qualification, practice, and professional ethics among architects;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

Strategic Plan [2022-2027]

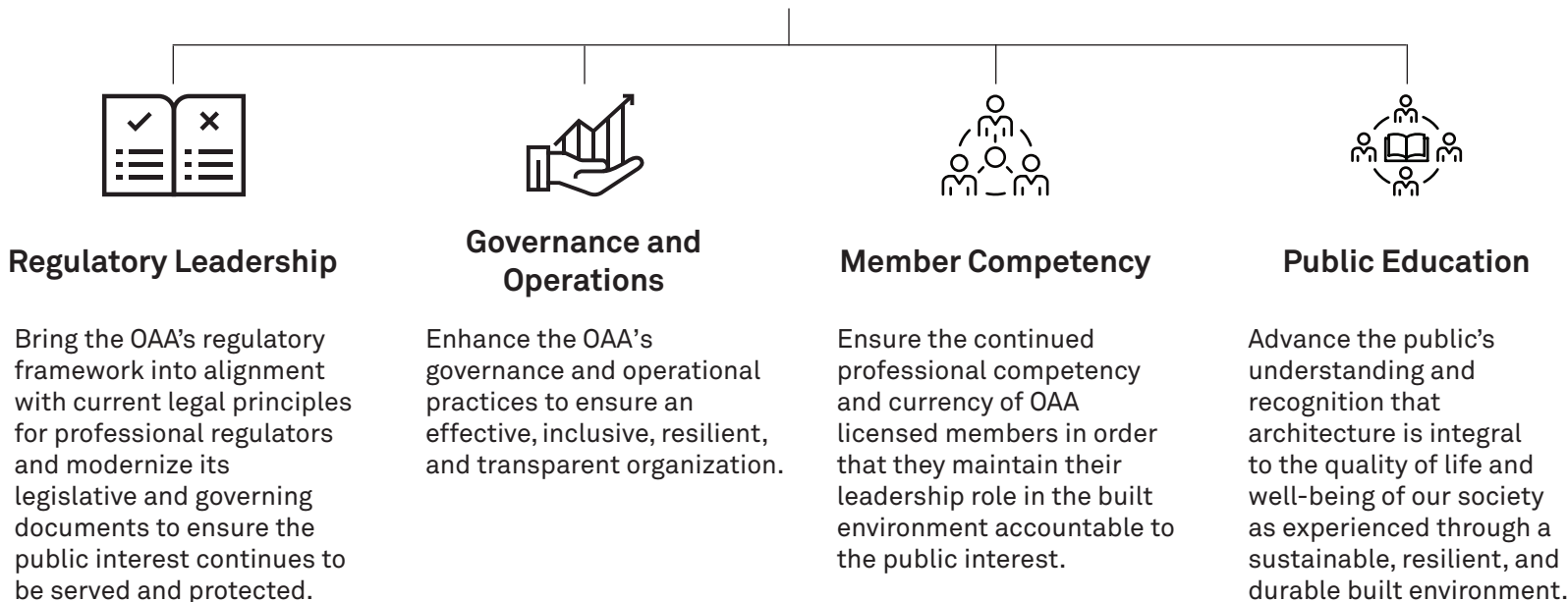
Themes



Values



Strategic Priorities





Regulatory Leadership

Governance and
Operations

Member
Competency

Public Education

Goal Statements	<p>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.</p>	<p>Enhance the OAA's governance and operational practices to ensure an effective, inclusive, resilient, and transparent organization.</p>	<p>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.</p>	<p>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.</p>
Strategic Priorities	<ul style="list-style-type: none">● Actively engage with government, legal counsel, and the Attorney General to advance the modernization of the <i>Architects Act</i> 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 <i>Architects Act</i> 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.	<ul style="list-style-type: none">● 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.	<ul style="list-style-type: none">● 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.	<ul style="list-style-type: none">● 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	<ul style="list-style-type: none">● 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.	<ul style="list-style-type: none">● 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	<ul style="list-style-type: none">● 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.	<ul style="list-style-type: none">● 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.

Council Policy

Policy Name	OAA Council Meetings Rules and Procedures
Issue Date	December 11, 2008
Revision Dates	unknown

Overview

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

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

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

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



ONTARIO ASSOCIATION OF ARCHITECTS
Council Meeting of May 13, 2025 at approx. 11:00 a.m.

Meeting # 299

OPEN MEETING AGENDA

Recognition of Traditional Lands

- | | | |
|---------------|--|--------------------|
| <i>4 mins</i> | 1.0 AGENDA APPROVAL | |
| <i>1 min</i> | 1.1 Declaration re. Conflict of Interest | |
| | 2.0 APPROVAL OF MINUTES | |
| <i>4 mins</i> | 2.1 Draft minutes of the March 6, 2025 Open Council Meeting (<i>see attached</i>) | |
| <i>2 mins</i> | 3.0 BUSINESS ARISING FROM THE MINUTES | |
| | 4.0 ITEMS FOR REVIEW AND APPROVAL | |
| <i>5 mins</i> | 4.1 Updates to Practice Tip.04 – 2006 Building Code – Project Code Review (<i>see attached</i>)
<i>It was moved by Yeung and seconded by that Council to endorse the revised OAA Practice Tip PT.04 2024 Building Code - Project Code Review as presented to Council on May 13, 2025.</i> | VP Yeung |
| <i>5 mins</i> | 4.2 Updates to Practice Tip.07 – Professional Opinion – Independent Opinion – Reviewing a Project Prepared by Another Architect (<i>see attached</i>)
<i>It was moved by Yeung and seconded by that Council to endorse the revised OAA Practice Tip PT.07 Professional Opinion - Independent Opinion Reviewing a Project Prepared by Another Holder as presented to Council on May 13, 2025.</i> | VP Yeung |
| <i>5 mins</i> | 4.3 Updates to Practice Tip.15 – Consulting Contracts, Managing Changes, Scope Creep (<i>see attached</i>)
<i>It was moved by Yeung and seconded by that Council to endorse the revised OAA Practice Tip PT. 15 Consulting Contracts, Managing Changes, Scope Creep as presented to Council on May 13, 2025</i> | VP Yeung |
| | 5.0 ITEMS FOR DISCUSSION | |
| | 6.0 REPORTS | |
| <i>1 min</i> | 6.1 Report from the President – Activities for the months of March-May (<i>see attached</i>) | President |
| <i>1 min</i> | 6.2 Report from the Executive Director (<i>see attached</i>) | Executive Director |
| <i>1 min</i> | 6.3 Report from the Registrar (<i>see attached</i>) | Registrar |
| | 6.4 Report from the Senior Vice President and Treasurer (<i>oral</i>) | SVP & Treasurer |
| <i>5 mins</i> | 6.4.a Financial Statements for 3 months ending February 28, 2025 (<i>see attached</i>) | |
| | 6.5 Committee Reports | Committee Chairs |
| <i>1 min</i> | 6.5.a Communications & Public Education Committee – Update (<i>see attached</i>) | VP Spiegel |
| <i>1 min</i> | 6.5.b Governance & HR Committee - Update (<i>see attached</i>) | SVP & Treasurer |
| <i>1 min</i> | 6.5.c OAA Building Committee - Update (<i>see attached</i>) | SVP & Treasurer |
| <i>1 min</i> | 6.5.d Practice Resource Committee (PRC) – Update (<i>see attached</i>) | VP Yeung |

7.0 ITEMS FOR INFORMATION

- 7.1 Report from semi-annual meeting of the Regulatory Organizations of Architecture in Canada (ROAC) (*see attached*)

8.0 OTHER BUSINESS

9.0 DATE OF NEXT MEETING

- 9.1 The next regular meeting of Council is June 19, 2025 at 9:30 a.m. at the OAA Headquarters, Toronto, Ontario.

10.0 ADJOURNMENT

Ontario Association of Architects

Meeting #298 Open

MINUTES

March 6, 2025

The two hundred and ninety eighth meeting of the Council of the Ontario Association of Architects, held under the *Architects Act*, took place on Thursday March 6, 2025 at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario and virtually via Zoom.

Present:	Settimo Vilardi	President
	Ted Wilson	Senior Vice President and Treasurer
	Lara McKendrick	Vice President
	Kristiana Schuhmann	Vice President
	Susan Spiegel	Vice President
	Loloa Alkasawat	Councillor
	Donald Ardiel	Councillor
	J. William Birdsell	Councillor
	Jim Buttici	Lieutenant Governor in Council Appointee (virtual)
	Natasha Krickhan	Councillor
	Jenny Lafrance	Councillor (virtual)
	Michelle Longlade	Lieutenant Governor in Council Appointee (virtual)
	Elaine Mintz	Lieutenant Governor in Council Appointee (virtual)
	Deo Paquette	Councillor
	Anna Richter	Councillor (virtual)
	Thomas Yeung	Councillor
	Marek Zawadzki	Councillor
	Kristi Doyle	Executive Director
	Christie Mills	Registrar
	Tina Carfa	Executive Assistant, Executive Services
Regrets:	Kimberly Fawcett-Smith	Lieutenant Governor in Council Appointee
	Ted Watson	Councillor
Guests:	Kathy Armbrust	COO
	Mélisa Audet	Manager, Practice Advisory Services
	Erik Missio	Manager, Communications
	Melanie Walsh	Manager, Finance (part attendance)

The President called the meeting to order at 1:05 p.m.

The President noted that a land acknowledgement which is a video of the documentation of his students' work in creating and constructing a [bench for the Teaching Lodge](#) at the Laurentian University main campus would be shared with Council as an acknowledgement and recognition of the Indigenous land and its people.

DECLARATION RE CONFLICT OF INTEREST

The President called for declaration of any conflicts of interest.

No conflicts of interest were declared.

AGENDA APPROVAL

9884. The President reported that there were no new items to be added to the agenda.

It was moved by Birdsell and seconded by Speigel that the agenda for the March 6, 2025 open meeting be approved as circulated.

-- CARRIED

APPROVAL OF MINUTES

9885. *Reference Material Reviewed:* Draft minutes of the January 23, 2025 Open Council meeting.

The draft minutes of the January 23, 2025 Open Council meeting were reviewed.

It was moved by Ardiel and seconded by Zawadzki that the minutes of the January 23, 2025 Open Council meeting be approved as circulated.

-- CARRIED

BUSINESS ARISING FROM THE MINUTES

9886. There was no business arising from the minutes.

ITEMS FOR REVIEW AND APPROVAL

9887. *Reference Materials Reviewed:* Memorandum from the Finance and Audit Committee dated February 25, 2025 re. Audited Financial Statements as at November 30, 2024 and attached supporting documentation. **(APPENDIX 'A')**

The Senior Vice President and Treasurer presented the 2024 audited financial statements to the Council and reported that the Committee was very satisfied with the services provided by the new auditor, BDO Canada during the audit process. There may be an opportunity in the future to coordinate an RFP with Pro-Demnity for future auditing services, noting that BDO is serving as the group auditor.

It was moved by McKendrick and seconded by Butticci that Council approve the 2024 OAA audited financial statements as presented to Council on March 6, 2025.

-- CARRIED

It was moved by McKendrick and seconded by Richter that Council approve the reappointment of BDO for a two-year term as presented to Council on March 6, 2025, subject to approval by the membership at the appropriate AGM.

-- CARRIED

9888. Honorary Membership Nomination (*oral*)

The President reported that Council had considered a nomination for an Honorary Member in the in camera meeting.

It was moved by Krickhan and seconded by Birdsell that Council approve the nomination of Ted Kesik for election to Honorary Membership within the OAA at the Annual General Meeting on April 8, 2025.

-- CARRIED

9889. *Reference Materials Reviewed:* Memorandum from Executive Director, Kristi Doyle dated February 18, 2025 re. Council appointment to Pro-Demnity Insurance Company (Pro-Demnity) Board of Directors and attached supporting documentation. **(APPENDIX 'B')**

Doyle reported.

It was moved by McKendrick and seconded by Alkasawat that Council approve the appointment of Anna Richter for a two-year term and Susan Speigel for a one-year term to serve as inter-locking Directors on the Pro-Demnity Insurance Company Board of Directors effective March 27, 2025.

-- CARRIED

9890. *Reference Materials Reviewed:* Memorandum from Executive Director, Kristi Doyle dated February 20, 2025 re. Updated Mutual Recognition Agreement – Regulatory Organizations of Architecture in Canada and National Council of Architectural Registration Boards and attached supporting documentation. **(APPENDIX 'C')**

Doyle reported.

A member of Council enquired as to whether any individual licensed in the U.S. can be licensed in Canada, or whether they need to be from a participating state.

Doyle confirmed that under the updated MRA any individual who holds a NCARB certificate and is licensed in a participant state is eligible. Under the current MRA architects in signatory states are also required to be practicing in a signatory state to avail themselves of the MRA. This change recognizes the competency of an architect, not where they happen to be practicing.

A member of Council requested some clarification on page three of the Mutual Recognition Agreement (MRA), point 1 which includes all states or participatory states.

Doyle responded that this section pertains to Canadians going to the U.S. and emphasized that the updated MRA is focused on competency regardless of which state within which the individual is practicing.

It was moved by Birdsell and seconded by Paquette that the Council of the Ontario Association of Architects approve the Mutual Recognition Agreement between the National Council of Architectural Registration Boards and the Regulatory Organizations of Architecture in Canada version 25 02 11 V.7, subject to minor adjustments as necessary through the approval process and that by doing so the Ontario Association of Architects agrees to be a Canadian Participant of the MRA.

-- CARRIED

It was moved by Vilardi and seconded by Ardiel that the Council of the Ontario Association of Architects approve the Interorganizational Acknowledgement document under the Mutual Recognition Agreement between the National Council of Architectural Registration Boards and the Regulatory Organizations of Architecture in Canada version 25 02 11 V.7, subject to minor adjustments as necessary through the approval process.

-- CARRIED

9891. *Reference Materials Reviewed:* Memorandum from Senior Vice President and Treasurer and Interlocking Director, Pro-Demnity Insurance Company, Lara McKendrick dated February 22, 2025 re. Pro-Demnity Insurance Company – Annual Appointment of Auditor and Actuary and attached supporting documentation. **(APPENDIX 'D')**

The Senior Vice President and Treasurer reported.

It was moved by McKendrick and seconded by Birdsell that Council direct the OAA President to vote in the affirmative regarding the recommendation to appoint BDO Canada as the Auditor, and J.S. Cheng as the Actuary for Pro-Demnity Insurance Company at the March 27, 2025 Annual Meeting of the Shareholder.

-- CARRIED

9892. *Reference Materials Reviewed:* Memorandum from Vice President and CPEC Chair, Susan Spiegel dated February 24, 2025 re. Conference Theme: 2026. **(APPENDIX 'E')**

Vice President Spiegel reported.

A member of Council requested further clarification on the meaning of the theme *Collaboration Powering Innovation* for the 2026 Conference.

Spiegel responded that collaboration is important in so many areas of practice. The theme is intended to reflect those many facets of practice. It is meant to be a broad statement. Innovation is important since the location is in the Grand Valley area known for its technology and development firms. This was noted by the Grand Valley Society of Architects as important as well.

A Council member suggested that some members decide on attending Conference based on the theme. The Councillor appreciated the broadness of the 2026 theme.

It was moved by Spiegel and seconded by Mintz that Council approve the Communication and Public Education Committee's recommendation that Collaboration Powering Innovation be the 2026 OAA Conference theme.

-- CARRIED

ITEMS FOR DISCUSSION

9893. There were no items for discussion.

EXECUTIVE COMMITTEE REPORTS

9894. *Reference Material Reviewed:* President's Activities for the months of January to March. **(APPENDIX 'F')**

The report was noted for information.

9895. *Reference Material Reviewed:* Report from Executive Director, Kristi Doyle dated March 6, 2025 re. Executive Director Report to Council. **(APPENDIX 'G')**

Doyle announced and welcomed the return of Cynthia Mykytyshyn, Communications Specialist from parental leave and new staff Thi Belizario who has joined the Continuing Education team in the role of Administrative Assistant, Continuing Education.

Doyle reported that there have been provincial and federal discussions with respect to inter-provincial trade barriers. Nova Scotia has tabled Bill 36 which seeks to eliminate trade barriers for professionals to allow for reciprocity of professions, adding that architecture already has reciprocity in place. There has been some concern with regards to the protection of the public interest and Doyle noted that staff will continue to monitor as government resumes.

The report was noted for information.

9896. *Reference Material Reviewed:* Memorandum from Registrar, Christie Mills re. Office of the Registrar Statistical Report to Council – January 1 to February 18, 2025. **(APPENDIX 'H')**

A member of Council referenced page three of the report and requested clarification for the reporting of no Experience Requirements Committee (ERC) assessments. Mills responded that this pertains to the reporting period which is noted at the outset of the report. The member also asked for additional detail regarding the project of the ROAC CACB standing committee and their pursuit of federal funding. Mills

noted that this is related to federal funding for a BEFA competency assessment initiative which may be useful to all Canadian regulators depending on the outcome; she is awaiting further detail and will provide that information once provided.

A Councillor referenced page eight of the report and requested clarification with respect to the impact of the 'parallel process plan'.

Mills responded that the requirement for a parallel processing plan for all regulators is a proposal within the *Fair Access to Regulated Professions and Compulsory Trades Act* (FARPACTA). The requirement is not in force yet, however, the content is a summary of what the OAA must address and comply with as soon as the amendments are in force. The proposal requires regulators to have a plan, reviewed and approved by the Fairness Commissioner, setting out how the various requirements for licensure could be fulfilled at the same time as opposed to sequential.

It was suggested that the sequence is important and that fulfillment of some requirements before moving to the next should be preserved. Mills noted that with the government prorogued consultations have been suspended but more information and details should be coming as soon as the government is back in play.

The report was noted for information.

9897. *Reference Material Reviewed:* Memorandum from Communications and Public Education Committee (CPEC) dated February 21, 2025 re. Communication and Public Education Committee – General Updates and attached background information. **(APPENDIX 'I')**

A member of Council requested clarification with respect to the proposed review of the OAA website.

A Councillor responded that options are being presented to the Committee in regard to enhancing the home front page to lessening the number of touchpoints to reach desired information. The search engine will not be as rich as Google however the site is rich in information.

The Manager of Communications reported that the last review of the website was five years ago. Review of the website includes:

- Landing page – review is underway by CPEC and the Communications team
- User Experience – consideration is to be made as to who will lead the charge. Website consultants and UX designers are possible options.

It was suggested by a Council member that an advisory group be tasked with testing the website.

It was suggested by a member of Council that they observed that students had little knowledge of the website. It was suggested that website training be offered to interns and students.

Doyle noted that instructional videos for interns and students are being developed and this could include a guide to finding information on the website. Doyle added that staff is implementing a quarterly newsletter for interns and students. The inaugural edition will be shared with Council in the coming days.

The report was noted for information.

9898. *Reference Material Reviewed:* Memorandum from Governance Committee dated February 18, 2025 re. Update from OAA Governance & HR Committee and attached supporting documentation. **(APPENDIX 'J')**

A member of Council suggested there was discrepancy in the terms of reference such that guests were permitted, however another section suggested that Council approval is required.

It was noted that this was not a discrepancy, and in fact two different situations, one where a guest would attend by invitation to speak to a specific item that may fall on the Committee's agenda. The other scenario occurs where the Committee may wish to engage additional expertise or resources.

The report was noted for information.

9899. *Reference Material Reviewed:* Memorandum from the OAA Building Committee dated February 10, 2025 re. Update from the OAA Building Committee and attached supporting documentation.

(APPENDIX 'K')

It was reported by the Chair of the Committee that construction for the Presidents Wall has been retained.

Armbrust noted that work will commence in April, adding that the Committee is planning an event to unveil the Wall after completion.

It was suggested by a member of Council that invitations include Past Presidents.

The report was noted for information.

9900. *Reference Material Reviewed:* Memorandum from Practice Resource Committee (PRC) dated February 24, 2025 re. Practice Resource Committee (PRC) Update and attached supporting documentation. **(APPENDIX 'L')**

Vice President Yeung reported that work is ongoing to update many PAS resources that related to the Building Code and *Construction Act*.

A member of Council enquired as to whether PRC is provided with a list of hotline topics to be discussed at the committee level.

Audet responded that the Practice Advisory Services (PAS) report outlines those topics semi-annually. If a pattern emerges, then it would be brought forward to PRC.

A member of Council enquired about the committee appointment process for Councillors, suggesting that a correction is needed in the Terms of Reference.

Doyle responded that the Governance Committee make the appointment of individual Councillors to the Committee at the beginning of each year. The Committee members at large are appointed by Council. It was agreed that under 'Composition and Term Limits' for the Building Committee that the last sentence of that section be amended to reflect that Councillors are appointed by the Governance Committee and not committee members.

The report was noted for information.

9901. *Reference Material Reviewed:* Memorandum from Vice President, Susan Speigel dated February 20, 2025 re. Update on the Policy Advisory Coordination Team's (PACT) work and attached background information. **(APPENDIX 'M')**

The report was noted for information.

ITEMS FOR INFORMATION

9902. *Reference Material Reviewed:* Memorandum from Vice President, Susan Speigel dated February 20, 2025 re. OAA Local Society Annual Reports for 2024 and attached supporting documentation.

(APPENDIX 'N')

The report was noted for information.

OTHER BUSINESS

9903. There was no other business.

DATE OF NEXT MEETING

9904. The next regular meeting of Council is Tuesday May 13, 2025 at 8:30 a.m. at the Ontario Room, Westin Ottawa, Ottawa, Ontario.

ADJOURNMENT

9905. **It was moved by Birdsell and seconded by Vilardi that the meeting be adjourned at 2:25 p.m.**

-- CARRIED UNANIMOUSLY

President

Date

Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 4.1

From: Thomas Yeung, Vice President & PRC Chair

Date: May 2, 2025

Subject: OAA Document Maintenance - Practice Tips Impacted by OBC 2024:
Updates to Practice Tip PT.04.

Objective: To provide overview of the updates to PT.04 2006 Building Code - Project Code Review (including a proposed title change) and obtain Council endorsement.

Background

The OAA's Practice Tips are accessed via the OAA website and, although written primarily for Architects and Licensed Technologists, 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.

In 2024, the [Ministry of Municipal Affairs and Housing](#) (MMAH) issued the 2024 edition of Ontario's Building Code which came into effect on January 1, 2025. This change in legislation resulted in the need to update multiple OAA resources including PT.04.

Key Changes to the Practice Tip PT. 04 (refer to Appendices 0, 1 and 2)

Practice Tip PT.04 was originally published as a Practice Bulletin in 2005 as a resource to members to assist in the demonstration of personal supervision & direction, and the maintenance of suitable record, with respect to the design of a project and specifically for matters that are governed by the building code. The Practice Bulletin was also noted to have been developed to supplement to PB A.9 (OBC Data Matrix).

In keeping with the role of the Practice Resource Committee (PRC), the members of the PRC are involved in the review of the Practice Tips in consultation with the Practice Advisory Services Team. To assist the PRC in their review of amendments to PT.04 the

attached Summary document was provided to the committee along with the red-lined document. See Appendix 0 which provides a high level summary of the changes as well as the process of review.

Next Steps - Communication Plan and Withdraw Previous Version

In tandem with the OAA's Communication team, staff from PAS will work on the following items to support the release of the updated resource following Council's review:

- Update to the OAA website, including edits to other associated resources such as [PT.00 Index to Practice Tips](#).
- Coordinate the change to the resource with other OAA Programs/ Service Areas (i.e. OAA Admission Course, CSA Access Program).
- Communications to Members: The updated Practice Tip will be posted on the website, featured in an upcoming issue of the OAA's Practice Advisory Newsletter as well as social media.

Action

Council is asked to consider the following motion:

It was moved by Yeung and seconded by That Council to endorse the revised OAA Practice Tip PT.04 2024 Building Code - Project Code Review as presented to Council on May 13, 2025.

Attachments

- Attachment 0: Executive Summary (Main Technical and Editorial Changes to PT.04)
- Attachment 1: REDLINE - PT.04 2006 Building Code (BC) Project Code Review – General (version 1.1)
- Attachment 2: PT.04 Building Code - Project Code Review (version 2.0)

Practice Tip PT.04 - Building Code - Project Code Review (new proposed title)

Executive Summary

Updated May 2, 2025

Background

- This Practice Tip was originally published as a Practice Bulletin in 2005 as a resource to members to assist in the demonstration of personal supervision & direction, and the maintenance of suitable record, with respect to the design of a project and specifically for matters that are governed by the building code.
- The Practice Bulletin was also noted to have been developed to supplement to PB A.9 (OBC Data Matrix).

Requirement to Update

- In light of the release of OBC 2024, this resource was identified as part of list of resources needing updates.
- PT.04 was last updated in Oct 2008.
- Although PT.04 is titled '2006 Building Code – Project Code Review', the appended checklists have not been updated since they were first published with the Practice Bulletin in 2005 and refer to the 1997 Building Code.

Overview of the Process and Input from Various Parties

- PRC had some initial discussion in October and November 2024, on the current state of the PT and two proposed options were proposed to update this resource. The two options discussed were as follows:
 - Option 1 to maintain the detailed code checklists
 - Option 2 to withdraw the checklists while expanding on the process of code review
- Based on this discussion, there was no consensus as to the benefit of providing the itemized code checklists.
- Upon further internal (PAS) deliberation on the pros and cons of providing members with detailed code checklists (including maintenance efforts), it was decided to develop a draft of Option 2 for review and consideration. It was deemed that this approach may be of more benefit to members in developing their skills in code review and customize it as they require.
- The draft of the updated PT.04 was provided to PRC for their review and feedback as part of the May 1, 2025 PRC meeting.
- PRC agreed with the approach of the updated Practice Tip. Proposed edits to help clarify and augment the content were provided by PRC. These were incorporated into the final attached draft.

Organization of PT.04 & Proposed Changes

- Updated title from 2006 Building Code (BC) - Project Code Review - General to Building Code – Project Code Review
- Revised 'Summary' to simplify and emphasize regulatory requirements
- OAA authored checklists are withdrawn
- Removed reference to specific code
- Members advised to develop their own systematic and comprehensive approach of documenting applicable code items and the resultant analysis

- Expanded on suggested procedures and best practices
- Following research on available external resources, reference to CHOP Appendices J to M was added
- Expanded on list of key code issues to be reviewed at the various stages of design. These items generally mirror the category headings from the withdrawn checklists.

Next Steps

- The revised OAA Practice Tip PT.04 2024 Building Code - Project Code Review is to be presented to Council on May 13, 2025 for review.





2006-Building Code (BC) **Project Code Review –General**

©2025, 2008 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

~~Project code reviews early in a project's development will reduce the possibility of delays and the revisions to a design to incorporate code requirements. Once the early project code reviews have been completed the systematic recording, reporting and updating of the code requirements will provide a framework for the continued development of the project.~~

~~The OAA in conjunction with industry partners has developed code checklists to assist practices in reviewing and recording the specific code requirements applicable to their projects.~~

OAA members are responsible for ensuring their projects comply with the Building Code Act and the building code and must not knowingly violate any federal, provincial, or municipal laws related to building construction, enlargement, or alteration. These obligations are set out in the regulations under the Architects Act. This Practice Tip provides general guidelines and steps to help members establish a structured approach to project code review. As each project is unique, members must tailor their review processes to align with the specific nature and requirements of their work.

Background

A systematic process for project code review can assist in the review and documentation of code matters ~~and in the demonstration of the personal supervision and direction by of an OAA member (architect) of through all stages of the design in its entirety.~~ Furthermore, integrating project code review in the early phases of a project's development will also reduce the possibility of later ~~delays and code related~~ revisions to contract documents being required.

The process for code review is one aspect of an overall quality assurance program that should be integrated into the project's development. Comprehensive office procedures, best practice ~~tips~~, and checklists can be of assistance in establishing and tracking project code requirements.

Code requirements which are recorded in a simple and standardized format should be available for review by all members of the project development team throughout the life of the project. Professional judgment will be required when developing the process for the recording and reviewing of code requirements for each project. Items such as the size and complexity of the project, the type of the construction proposed, the experience of the individuals involved in the design team and the location of the project should be considered when adapting standardized office procedures for use on each project.

Building permits are issued or rejected based on the information contained in the permit application submission. To avoid delays in the processing of permit applications and to reduce the chance of applications being rejected due to incompleteness, practices should ensure that all relevant code related information is included on documents supporting the application for a building permit. ~~The Practice Tip PT.03 Building Code Data Matrices~~ Data (PT.03) provides templates for the information to be provided, as applicable, on the documents supporting the application for permit.

~~The checklists developed by OAA, provide As the BC Data Matrices only summarize the major requirements, members should identify and document a list of all additional code related items to be addressed requirements and establish an appropriate method of recording the analysis of these code items and the requirements for the project. Checklist templates may be an efficient method to note code items that are~~

common to various building types ~~and may be applicable to specific projects. However, review and customization of a checklist template will be required to meet specific practice and/or project needs.~~

The ~~checklists are intended to establish~~ establishment of a systematic approach will assist practices in the review of code related information in order to perform a building code analysis and develop the information to be included on documents supporting the application for building permit. Specific project conditions and requirements that may not be noted on the checklists should also be incorporated into the permit application.

Note: The OAA checklists linked to this Practice Tip contain reference numbers to the articles in the 1997 Ontario Building Code, which in some cases may be changed in the 2006 Building Code. The checklists will be reissued upon completion of the amendments to reference numbers to suit the 2006 Building Code.

Suggested Procedure

It is good practice for ~~the architect(s)~~ the OAA member(s) exercising personal supervision and direction of the preparation of designs to consider the:

- Establishment and implementation of or the adherence to office policy on the use and updating of checklists or other form of documentation for project code review. ~~The attached “Project Code Review – Worksheet” is an example of a form that can be used to record code related information for use by the project team.~~
- Establishment and implementation of procedures to document a comprehensive code analysis and to update code requirements for projects.
- Establishment and implementation of the results of the code analysis in the drawings and specifications for the project.
 - As the building code typically states minimum dimensional requirements, members should consider construction tolerances when translating code requirements to the drawings and specifications.
- Transfer of appropriate portions of the code analysis to the Building Code Data Matrices for the project. Refer to Practice Tip PT.03.

It is good practice for the ~~architect~~ OAA member assigned to each project to:

- Consider the manner in which ~~staff/he/she~~ will be directed ~~staff, document~~ code requirements documented, and work reviewed ~~work~~ related to code requirements, taking into account the size, scope and complexity of the project.
- Set up a comprehensive checklist or other form of documentation for the each specific project. This may be based on a previously developed template that is customized for the specific project. The checklist may be based on the information contained in one or more of the following examples; Identifying the code items that may or may not be appropriate to the various stages of development for each project will be useful.
 - It is suggested that OAA members review The Canadian Handbook of Practice (CHOP), Chapter 6.4: Appendix J – Checklist – Life Safety Information to Include on Drawings: Architectural. This checklist provides an overview of the life safety items that should be included on architectural drawings and hence provides a good road map to the associated code items that will be required to review. As this checklist is focused on life safety items, members should ensure all other code items applicable to the project are also reviewed, for example Energy Efficiency, Health Requirements and Barrier-Free Design, etc. Furthermore, members should review and coordinate Appendices K, L and M with consultants regarding life safety information to be included on Structural, Mechanical and Electrical drawings.

•

OAA Part 9, Housing Checklist (PDF)

OAA Part 9, Small Buildings Checklist (PDF)

~~OAA Part 3, Buildings Checklist (PDF)~~

~~OAA Part 3, Alteration of Occupancy Checklist (PDF)~~

~~OAA Part 3, Portable Classroom Checklist (PDF)~~

~~OAA Part 3, Public Pools Checklist (PDF)~~

~~Although the information contained herein specifically refers to Ontario's 1997 the Ontario Building Code, similar procedures are applicable to projects governed by the National Building Code.~~

- Obtain a current copy of applicable municipal by-law(s) and application requirements for the building permit pertinent to the location of the project. Determine the extent of information that may be required on documents supporting the application for the building permit.
- Review ~~referenced and other~~ all appropriate code sections to determine the scope of code related matters for the project and develop a suitably detailed analysis document ~~annotate the checklist~~ to record the relevant information and code related decisions made pertinent to the project.

The process, as outlined below, does not address all aspects of code compliance for every building type. Instead the process is intended to act as a general guide to project code review. A detailed review of code requirements will be required and specific code requirements should be recorded and communicated as needed. A more detailed project code review may be appropriate early in the design process to take into account the specific requirements of some project types or the preferences of the project team.

1.0 Schematic Design Phase

Develop a general outline of items that affect building locations, physical layout and circulation patterns for the building(s) and site. Consider the following:

- Building(s) location, siting, and fire fighter access
- Building configuration and area
- Importance category and construction type
- Building occupancy(ies) and occupant load
- Spatial separation (eg unprotected openings and limiting distances) and firewall-fire separation requirements
- Exiting and washroom requirements
- Barrier-free design
- Fire suppression systems
- Use of combustible construction materials, and
- Resource conservation / energy efficiency
- Presence of hazardous materials

Record the code analysis and communicate project code requirements ~~with to production~~ team members. Establish a methodology to permit the continued updating, development and communication of project code review. Complete the sections on the code checklists-review of code items appropriate for the project and the current level of development. Supplement the information with any additional project code details applicable to the project. ~~Record information on occupancy(ies), building area, and construction systems and coordinate project code requirements with the siting of the building(s). Use occupant loads to establish approximate areas and locations of exits and washrooms. If appropriate use estimated areas and or occupant loads can be used at this phase.~~ Calculate statistical information in more detail once the design is resolved. Review earlier assumptions and adapt designs when required.

Invite consultants to review stated code requirements and to state the schematic code requirements relevant to their disciplines s at this phase.

Note any project assumptions or decisions that are close to building code limits and determine if it is likely to go over or under that limit as the design progresses. For example, if the building area is close to 600 m², is it likely to get larger and require design as a Part 3 building or get smaller and be allowable as a Part 9 building? Similarly, is the occupant load likely to require a second exit or doors swinging in the direction of exit travel?

2.0 Design Development Phase

Review schematic design documents and verify that previously identified project information and code requirements remain applicable.

Confirm that the information contained in the project code review is appropriate for the level of design detail, the understanding of building systems and the selection of construction materials to date. Continue the development of detailed plans, preliminary building sections, outline specifications and the project code review. Consider the following expanded list of key code issues, while refining the code requirements reviewed in the schematic design phase:

- Building(s) location, siting, and fire fighter access
- Building configuration and area
- Importance category and construction type
- Building occupancy(ies) and occupant load
- Spatial separation (eg unprotected openings and limiting distances) and firewall fire separation requirements (if applicable)
- Exiting and washroom requirements
- Barrier-free design
- Fire alarm and fire suppression systems
- Use of Ccombustible construction materials
- ~~Egress and accessibility requirements~~
- Resource conservation / energy efficiency
- Compartmentalization and life-safety requirements within floor areas, and
- High building requirements (if applicable)
- Additional seismic and wind load requirements (if required)
- Mezzanine and interconnected floor space requirements
- Service spaces
- Health requirements
- Acoustic separation/sound transmission requirements for interior partitions and floor assemblies
- Lighting and emergency power, and
- Alternative solutions (if applicable)

Review the design and updated project code review with the client and municipal or other regulatory officials when appropriate, for example as part of the Site Plan Approval process.

~~When using the Code checklists,~~ Complete the sections-checklistreview of code items identified as being appropriate for this stage of design development. Consider the following suggested procedures:

- Confirm occupancies, occupant loads, exit capacities and compartmentalization before verifying that travel distances and exit capacities are adequate.

- Confirm building classification, major occupancy separations, structural fire resistance ratings and exterior wall constraints prior to finalizing material and system selections
- ~~Review and refine siting requirements~~
- ~~Review and refine barrier free accessibility requirements for all floor areas~~
- ~~Review and refine building services, life safety systems, detection system, and resource conservation requirements. Review methods of compliance toward resource conservation and minimum energy efficiency requirements. Coordinate with MEP consultants to perform preliminary calculations to confirm specified systems and materials can meet efficiency requirements.~~
- Continue to review with consultants the stated code requirements and the code requirements relevant to their disciplines at this phase.

Minimize potential conflicts in the development of construction documents by preparing a comprehensive list of all code requirements at the completion of the design development phase.

3.0 Construction Document Phase

Review and verify that the design development documents prepared to date are in keeping with the project code review.

Continue the development of building details, specifications and the project code review. Complete the review of code items appropriate for this stage of documentation. Consider the following code requirements:

- Openings in fire separations and required closures (including fire and smoke dampers)
- Firestopping requirements
- Stair, ramp, handrails and guard detail requirements
- Door, window, and hardware detail requirements, and
- Flame-spread ratings of interior finishes.

Establish a list of submissions that will be required from the contractor to demonstrate the adequacy of construction materials, contractor qualifications and any test procedures that must be submitted to ~~e~~Chief ~~b~~Building ~~e~~Official. Summarize these requirements in the construction contract documents.

Include a summary of code requirements in the construction contract documents by entering the required information from the project code review into the appropriate BC Data Matrix~~ces~~ (Refer to PT.03). Where appropriate, supplement the ~~“O~~BC Data Matrix~~”~~ with a more detailed summary of specific code requirements for each portion of the building. The expanded recording of code requirements and detailed calculations will assist the building officials to determine code compliance when reviewing the application for building permit.

Graphically demonstrate pertinent code features such as fire separations, fire resistance ratings, travel distances, ~~and~~ exit capacity, and barrier-free paths of travel on plans, key plans and/or details. ~~(see attached link.)~~ The graphic information will assist the contractor, trades, and inspectors in the construction and review of the work.

It is recommended that a final review of the documents, the BC Data Matrix, and pertinent project records relative to BC-building code matters take place prior to sealing and signing the documents supporting the application for building permit.

It is common, particularly for large projects, to include a detailed building code report with the application for permit, often prepared by a code consultant. OAA members should review the building code report, at all applicable milestones, to confirm the interpretation of the code requirements applicable to the project. Members should then confirm that the requirements from the report are integrated accordingly into the drawings and specifications.

It is recommended to keep records of all comments received from the Chief Building Official and responses provided during the building permit process. The issued building permit should also be kept on file.

4.0 Contract Administration Phase

Review the roles and responsibilities of the client, contractor and ~~architect-holder~~ as outlined in the ~~BC building code~~ and the *Architect's Act*. Review the Canadian Handbook of Practice (CHOP), ~~and/or the OBOA – Field Inspection Guide for Housing and PT.05 General Review – Building Code and Non-Code Related Matters~~ for further guidance on general review.

Continued code review and analysis will be required to be performed during the tender and contract administration phase for issues such as proposed substitutions and owner requested changes which may have code implications.

It is ~~also-therefore~~ good practice to manage documents representing matters governed by the ~~Code-building code~~ and which are generated subsequent to the issuance of the building permit (e.g. addenda, change orders, and site review reports which will be submitted to the chief building official) in a manner similar to that for the documents supporting an application for building permit.

References

Ontario ~~Building Code Act~~Building Code Act,

Ontario ~~Building Code~~Building Code,

National Building Code,

Canadian Handbook of Practice (CHOP)

Practice Tip PT.03 Building Code Data Matrices

Practice Tip PT.05 General Review – Building Code and Non-Code Related Matters

Attachments

OAA Code Checklists:

- ~~Project Code Review – Worksheet (excel)~~
- ~~Part 3, Public Pools Checklist (pdf)~~
- ~~Part 3, Public Pools Checklist (word)~~
- ~~Part 3, Portable Classroom Checklist (pdf)~~
- ~~Part 3, Portable Classroom Checklist (word)~~
- ~~Part 3, Alteration of Occupancy Checklist (pdf)~~
- ~~Part 3, Alteration of Occupancy Checklist (word)~~
- ~~Part 3, Buildings Checklist (pdf)~~
- ~~Part 3, Buildings Checklist (word)~~
- ~~Part 9, Small Buildings Checklist (pdf)~~
- ~~Part 9, Small Buildings Checklist (word)~~
- ~~Part 9, Housing Checklist (pdf)~~
- ~~Part 9, Housing Checklist (word)~~

~~National Building Code~~,

~~Canadian Handbook of Practice (CHOP)~~

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.

REDLINE

OAA Part 9, Housing Checklist

Drawings Reviewed: (titles plus dates): _____	Project Name: _____
	Project Number: _____
	Review By: _____ Date: _____
	Approved By: _____ BCDN: _____

Legend: ☐ **N** Not required ☐ **R** Required ☐ **C** Confirm requirements or construction detail(s) ☐ **RC** Review completed and item indicated on documents

This checklist is intended to assist architects in a review of code requirements to be considered in the preparation and review of documents to support a permit application. A simple review of the checklist is not a substitute for a thorough review of the OBC. Modify the checklist to note applicable code requirements for the project.

1. BUILDING HEIGHT AND AREA			OBC Code Reference(s)
— —	a	Storeys above grade and building area	2.1.1.3
— —	b	Room and space dimensions	9.5
— —	c	Shoring details	9.12.1.4

2. FIRE SAFETY PROTECTION			
— —	a	% of unprotected openings ($>130\text{cm}^2$)	9.10.14.1 to 9.10.14.10
— —	b	F.R.R. of external wall and construction non-combustible cladding where $LD < 600\text{mm}^2$	9.10.14.11 & 9.10.14.12
— —	c	F.R.R. of external wall and construction, dwelling above another	9.10.14.11
— —	d	Protected openings	9.10.14.5
— —	e	Rating for closures	9.10.13.4
— —	f	Party walls (see S.P. for wood party walls)	9.10.11.2., 9.10.11.4 & 9.11.2
— —	g	Firewalls (internal, external req'ts)	9.10.11 & 9.11.2
— —	h	Combustible projection in townhouse	9.10.14.13
— —	i	Protection of soffits (common attic > 2 suites)	9.10.12.5
— —	j	Fire stopping	9.10.15
— —	k	Gas proofing of garage	9.10.9.16.(3)
— —	l	Garage floor slope	9.35.2.2
— —	m	Doors from garage	9.10.13.15 & 9.6.5.6
— —	n	Single exit travel > 1 storey: provide balcony (or window when no dwelling above another)	9.9.9

OAA Part 9, Housing Checklist

— —	e	Forced entry requirements —	9.6.8. & 9.7.6
— —	p	Openable window each level with bedrooms (0.35m ² /380mm clear opening max.) —	9.7.1.3 & 9.7.1.4
— —	q	Windows or access panels (when dwelling above another) —	9.10.19.1
— —	r	Smoke alarms on each floor level (interconnected) —	Carbon monoxide detector — 9.10.18 & 9.33.4

3. FOOTINGS AND FOUNDATIONS

— —	a	Soil bearing capacity (minimum 75 KPA) —	9.4.4.1 & Table 9.4.4.1
— —	b	Size of footings/ basement column pad footings —	bb—SG-10 for joists > 4.9 m/16' span — 9.15.3.3, Table 9.15.3.3, SG-10
— —	c	Frost coverage —	9.12.2.2. & Table 9.12.2.2
— —	d	Max. foundation wall height (watch for laterally unsupported walls at stair opening/framing) —	9.15.4.1 & Table 9.15.4.1
— —	e	Height above grade min 150 mm —	9.15.4.3
— —	f	Reduced thickness —	9.15.4.4.(1) to (3)
— —	g	Capping & parging (concrete block only) —	9.15.6.1, 9.15.6.1 & 9.15.6.2
— —	h	Dampproofing & drainage layer —	9.13.3, 9.14.2
— —	i	Drainage and coverage —	9.14.3. & 9.14.4.2
— —	j	Step footings —	9.15.3.8
— —	k	Sill plate anchorage & levelling —	9.23.7.2 & 9.23.6.1 & 9.23.6.2

4. CONCRETE SLABS

— —	a	Concrete strength —	9.3.1.6 & 9.3.1.7
— —	b	Reinforcement for structural slabs —	9.3.1.9 & Part 4
— —	c	Basement floor drain —	9.31.4.4

5. STRUCTURAL COMPONENTS

— —	a	Max. deflections —	Table 9.4.3.1
— —	b	Lintels for masonry —	Tables 9.20.5.2.A & 9.20.5.2.B
— —	c	Wood lintels —	9.23.12.3 & Tables A-13 to 20

OAA Part 9, Housing Checklist

<input type="checkbox"/>	d	Steel beams supporting floors (calculation by P.Eng. Yes/No)	Table 9.23.4.3 & Part 4
<input type="checkbox"/>	e	Joists and steel beams	9.23.9.2.(1) to (5)
<input type="checkbox"/>	f	Steel columns	9.17.3.1 to 9.17.3.4
<input type="checkbox"/>	g	Wood columns	9.17.4.1 to 9.17.4.4
<input type="checkbox"/>	h	Masonry/concrete columns	9.17.5 & 9.17.6

6. FLOOR CONSTRUCTION

<input type="checkbox"/>	a	Floor joists and beams (proprietary joist manufacturer Yes/No)	9.23.4.1 & Tables A-1 to A-11
<input type="checkbox"/>	b	Strapping & bridging (engineered IBS bridging Yes/No)	9.23.9.4 & Tables A-1 & A-2
<input type="checkbox"/>	c	Cantilevered floor joists	9.23.9.10 & Table 9.23.3.4
<input type="checkbox"/>	d	Concrete topping	9.23.4.4 & Tables A-1, A-8, A-11

7. WOOD FRAME WALLS

<input type="checkbox"/>	a	Stud size/spacing (2 floors-38x89 @ 300o/c)	9.23.10 & Table 9.23.10.4
--------------------------	---	--	---------------------------

8. MASONRY/STONE VENEER

<input type="checkbox"/>	a	Thickness & height	9.20.1.1., 9.20.6.4
<input type="checkbox"/>	b	Veneer ties	9.20.9.5 & Table 9.20.9.5
<input type="checkbox"/>	c	Sheathing paper	9.23.17.1 to 9.23.17.3
<input type="checkbox"/>	d	Control of rain water penetration	9.20.13.1 to 9.20.13.8

9. ROOF AND CEILING CONSTRUCTION

<input type="checkbox"/>	a	Ceiling joists	9.23.4.1, Table A-3, 9.23.13.10
<input type="checkbox"/>	b	Roof joists	9.23.13.9 Tables A-4, A-5
<input type="checkbox"/>	c	Roof rafters max. 9.75 m (32'0")	9.23.13.8, Tables A-6, A-7
<input type="checkbox"/>	d	Additional roof loads (clay tile)	9.23.4.5
<input type="checkbox"/>	e	Roof trusses (check layout, beams req'd bearing P.Eng. stamp — attach layout and girder truss to drawing)	9.23.13.11.(1) to (6)
<input type="checkbox"/>	f	Collar ties	9.23.13.7.(1) & (2)

OAA Part 9, Housing Checklist

—	g	Struts, dwarf walls	9.23.13.7.(3) to (5)
-		—	
—	h	Ridge support (slope $\leq 4:12$ or no wall ties)	9.23.13.8.(1) & (2)
-		—	
—	i	Wall ties	9.23.13.8.(4)
-		—	

10. ROOF DETAILS

—	a	Roof space ventilation(1:150; 1:300; mansard & soffitless roofs)	9.19.1.1 to 9.19.1.4
-		—	
—	b	Cathedral ceilings	9.19.1.2. & 9.19.1.3
-		—	
—	c	Slope	9.26.3.1 Table 9.26.3.4
-		—	

11. INSULATION

—	a	Areas to be insulated and amount required	Table 9.25.2.1 (Zone 1)
-		—	
—	b	Thermal design: by Arch. or P.Eng.	9.38
-		—	
—	c	Eave protection	9.26.5.1.(1) & .(2)
-		—	
—	d	Air & vapour barriers	9.25.3; 9.25.4
-		—	

12. NATURAL LIGHT & VENTILATION

—	a	Finished rooms, interior rooms, laundry	Table 9.7.1.2 & 9.32.1.2 & 9.32.2
-		—	

13. STAIRS

—	a	Interior & exterior stairs	9.8.3.1.(1) & (2) & 9.8.3.2
-		—	
—	b	Width & headroom	9.8.3.3 & 9.8.3.4.
-		—	
—	c	Curved stairs and winders	9.8.5.
-		—	
—	d	Landings (check if rear deck required)	9.8.4.
-		—	
—	e	Handrails	9.8.7.
-		—	
—	f	Foundation required	9.8.9.1.
-		—	

14. GUARDS

—	a	Interior & exterior stairs	9.8.8.2.(4) & (5)
-		—	
—	b	Balcony, stairwells, porches, landings	9.8.8.2.(1) to (5)
-		—	
—	c	Construction (P.Eng. design or SG-7 details)	9.8.8.4 to 9.8.8.8 & SG-7
-		—	

OAA Part 9, Housing Checklist**15. CHIMNEYS**

— —	a	650°C chimney (ULC S629) _____	9.21.1.2
— —	b	Chimney flues serve fireplace only _____	9.21.2.1
— —	c	More than one appliance _____	9.21.2.2
— —	d	Inclined 45° max to the vertical _____	9.21.2.3
— —	e	Clearance to combustibles _____	9.21.5.1
— —	f	Chimney flue clearance to joists, beams _____	9.21.5.3

16. SOLID FUEL — APPLIANCES

— —	a	Masonry fireplaces (wall thickness)(check framing around fireplaces & chimneys) _____	9.22.1.2
— —	b	Fireplace liner (steel liners — ULC S639M) _____	9.22.2
— —	c	Hearth, damper & smoke chamber _____	9.22.5, 9.22.6, 9.22.7
— —	d	Prefab fireplaces (ULC S640) _____	9.22.8.1, 9.33.1.2
— —	e	Clearance to combustibles (from smoke chamber 25mm (1") _____	9.22.9
— —	f	Combustion air requirement; HRV (co-ordinate with mech.) _____	9.22.1.4.(1) to (7), 9.32.3.8
— —	g	Fireplace inserts (ULC S628 & CSA B365M) _____	9.22.10
— —	h	Stoves (ULC S627 & CSA B365M) _____	9.33.1.2

Drawings Reviewed: (titles plus dates): _____	Project Name: _____
	Project Number: _____
	Review By: _____ Date: _____
	Approved By: _____ BCDN: _____

Legend: ☐ N Not required ☐ R Required
☐ C Confirm requirements or completed and item ☐ RC Review
_____ construction detail(s) _____ indicated on documents

This checklist is intended to assist architects in a review of code requirements to be considered in the preparation and review of documents to support a permit application. A simple review of the checklist is not a substitute for a thorough review of the OBC. Modify the checklist to note applicable code requirements for the project.

1. **GENERAL** _____
_____ OBC Reference

_____	a	Bldg height (3 storeys maximum) = _____	2.1.1.3
-			
_____	b	Building area = 600m ² max. _____	2.1.1.3
-		Gross Area = _____	Part 1 Definition
		m ² _____	
_____	c	Professional design & review (when gross area > 600m ²)	2.3
-			
_____	d	Major occupancies	9.10.2 & Table 9.10.2.1
-			
_____	e	Basement as a separate building	9.10.4.3
-			
_____	f	Shoring details	9.12.1.4
-			

2. FIRE SEPARATION BETWEEN FLOORS & OCCUPANCIES, ROOMS & SPACES

_____	a	Inter-connected floor spaces	9.9.4.7, 9.10.9.5 & 3.2.8
-			
_____	b	Shaft separation	9.10.1.3.(6) & (7)
-			
_____	c	F.R.R. walls, floors and roofs	9.10.8 & SG-8
-			
_____	d	Permitted openings in wall and ceiling assemblies	9.10.5.1
-			
_____	e	Floors & roof fire rating based on occupancy	Table 9.10.8.1
-			
_____	f	Roof fire rating (sprinkler waiver)	9.10.8.2
-			
_____	g	Support of rated assemblies	9.10.8.3
-			
_____	h	Roof supporting an occupancy (construct as a floor)	9.10.8.6
-			
_____	i	Continuity of fire separation	9.10.9.2
-			
_____	j	Floor assemblies (exceptions to fire separation requirements)	9.10.9.4
-			

_____	k	Tenancy or occupancy separation	9.10.9.11
-		_____	9.10.9.13 to 14

_____	l	Separation for horizontal service space	9.10.9.10
-		_____	
_____	m	Public corridor separation	9.10.9.15
-		_____	
_____	n	Storage and repair garage separation	9.10.9.16 & 9.10.9.17
-		_____	
_____	o	Service room separation / Incinerators	9.10.10.3 & 9.10.10.5
-		_____	
_____	p	Garbage room separation (no chute)	9.10.10.6
-		_____	
_____	q	Fire wall	9.10.11, 3.1.10
-		_____	
_____	r	Spandrel wall between openings	9.10.12.1
-		_____	
_____	s	Location of skylights	9.10.12.3
-		_____	
_____	t	Closures for opening in fire separation [self closer, latch, max. size]	9.10.13 Table 9.10.13.(1)
-		_____	

3. REQUIREMENTS FOR EXITS

_____	a	2 exits for 60 occ. load on roof	9.9.2.1.(2)
-		_____	
_____	b	Ancillary rooms not to open into an exit	9.9.2.6
-		_____	
_____	c	Stair treads at right angles to exit travel	9.9.2.9
-		_____	
_____	d	Width of exits and exit corridors	9.9.3.2 & 9.9.3.3
-		_____	
_____	e	Headroom clearance in exits minimum 2100 mm	9.9.3.4.(1)
-		_____	
_____	f	Separation of exit	9.9.4.2
-		_____	
_____	g	Protection of exposed exterior exit stair	9.9.4.4
-		_____	
_____	h	Protection of window and door in exit	9.9.4.5 & 9.9.4.6
-		_____	
_____	i	Appliances or boiler near exit	9.9.5.7 & 9.9.5.8
-		_____	
_____	j	Door swing in exit corridors & stairs	9.9.6.2
-		_____	
_____	k	Min. door size in corridor, 810 mm x 2030 mm	9.9.6.4
-		_____	
_____	l	Door swing from room over 60 persons & exit door	9.9.6.5
-		_____	

— —	m	Landing 300 mm wider and longer than door —	9.9.6.6
— —	n	Exit door able open from inside without key —	9.9.6.8
— —	o	Door at corridor to exit in 2 direction —	9.9.7.1
— —	p	Dead-end corridor —	9.9.7.2
— —	q	2 egress doors to suites —	9.9.7.3
— —	r	Min 2 exits from every storey —	9.9.8.2
— —	s	Single exit permitted under 2 storeys (O.L. < 60) —	9.9.8.2.(2)
— —	t	Remoteness of exits —	9.9.8.4
— —	u	Exit through lobby —	9.9.8.5
— —	v	Egress from dwelling units —	9.9.9
— —	w	Exit sign location and illumination —	9.9.10.3 & 9.9.10.7
— —	x	Sign to basement only —	9.9.10.8

4. STAIRS, RAMPS, HANDRAILS, & GUARDS

— —	a	Min. 3 risers —	9.8.2.2
— —	b	Riser, tread and nosing —	9.8.3.1 & 9.8.3.2
— —	c	Min. width —	9.8.3.3.(1)
— —	d	Clear height of 2050 mm for stair —	9.8.3.4
— —	e	Landings —	9.8.4.1 & 9.8.4.2
— —	f	Max. 3700 mm between landings —	9.8.4.3
— —	g	Clear height of 2050 mm for landings —	9.8.4.4
— —	h	Curved stair (exit & non-exit) and winders in a stair —	9.8.5.1 to 9.8.5.3 & 3.4.6.8
— —	i	Max. gradient of ramp (refer also to B/F requirements) —	9.8.6.2 & 3.8.3.4
— —	j	Level area in ramps —	9.8.6.3

— —	k	Handrails on stairs, continuous handrail, handrail extension —	9.8.7.1 to 9.8.7.3
— —	l	Height and clearance of handrail —	9.8.7.4 to 9.8.7.5

— —	m	Projection of handrail —	9.8.7.6
— —	n	Handrail for ramps —	9.8.7.7
— —	o	Attachment of handrails —	9.8.7.8
— —	p	Required guards —	9.8.8.1
— —	q	Height of guards —	9.8.8.2
— —	r	Curb and guard for garages —	9.8.8.3
— —	s	Openings through a guard —	9.8.8.4
— —	t	Design to prevent climbing —	9.8.8.5
— —	u	Support for exterior concrete stair —	9.8.9.1
— —	v	Non-skid finish —	9.8.9.5.(2)
— —	w	Open stairway "D" & "E" occupancy —	9.9.4.7 & 9.10.9.5

5. DOORS & WINDOWS

— —	a	Glass in doors and sidelights —	9.6.6.2
— —	b	Visibility of glass or transparent doors —	9.6.6.4
— —	c	Resistance to forced entry [doors] —	9.6.8
— —	d	Windows min. area —	9.7.1.2 Table 9.7.1.2
— —	e	Bedroom windows —	9.7.1.3
— —	f	Window opening onto a window well —	9.7.1.4
— —	g	Windows in public areas (residential occupancy) and forced entry —	9.7.5 & 9.7.6.1
— —	h	Natural ventilation —	9.32.2 Table 9.32.2.1

6. Spatial Separation

— —	a	Protection of steel lintels —	9.10.7.1 & 3.2.2.3
--------	---	----------------------------------	--------------------

_____	b	Exterior walls meeting at angle	9.10.12.4
-		_____	
_____	c	Protection of soffits	9.10.12.5
-		_____	

7. LIGHTING, FIRE ALARM AND FIREFIGHTING

_____	a	Lighting for every exit and corridor	9.9.11.2
-		_____	
_____	b	Emergency lighting in exit, corridor, or below grade	9.9.11.3
-		_____	
_____	c	Where fire alarm is required	9.10.17.1, 9.10.17.2
-		_____	Table 9.10.17.2, 9.10.17.5
_____	d	Required suite smoke alarms	9.10.18.1 to 9.10.18.4
-		_____	
_____	e	Access panel on upper floors	9.10.19.1
-		_____	
_____	f	Access to basement	9.10.19.2
-		_____	
_____	g	Access for fire dept. equipment (street)	9.10.19.3
-		_____	

8. REQUIREMENTS FOR MEZZANINES

_____	a	Mezzanine (not a storey)	9.10.4.1 & 9.10.4.2
-		_____	
_____	b	Termination at vertical fire separation	9.10.12.2
-		_____	
_____	c	Exit requirements	9.9.8.6
-		_____	
_____	d	Egress facilities (where exits not required)	9.9.7.3
-		_____	

9. FIRESTOPPING

_____	a	Pipes penetrating fire separation	9.10.9.6 & 9.10.9.7
-		_____	
_____	b	In concealed spaces in ceiling, roof or attic (unsprinklered, combustible)	9.10.15.1.(4) & (5)
-		_____	
_____	c	In concealed space in mansard roofs, canopies or balconies of comb. construction	9.10.15.1.(6)
-		_____	

**OAA Part 3, Alterations Checklist
(For Group A-2, D, E or F Occupancies)**

Drawings Reviewed: (titles plus dates)	Project Name: _____	Project Number: _____
	Review By: _____	Date: _____
	Approved By: _____	BCDN: _____

Legend: ☐ **N** Not required ☐ **R** Required ☐ **C** Confirm requirements or construction detail(s) ☐ **RC** Review completed and item indicated on documents

This checklist is intended to assist architects in a review of code requirements to be considered in the preparation and review of documents to support a permit application. A simple review of the checklist is not a substitute for a thorough review of the OBC. Modify the checklist to note applicable code requirements for the project.

1 GENERAL		OBC Reference(s)
<input type="checkbox"/> a	Occupancy classification	3.1.2
<input type="checkbox"/> b	Change in major occupancy / change in Use	2.4.1.1, 3.15 & 11.4
<input type="checkbox"/> c	Professional design (if YES, Part 3 General Checklist and review Part 10, 11 review required)	(2.1.1.7) & 11.4

2 EXISTING BUILDING REQUIREMENTS (applicable to "occupancy")

<input type="checkbox"/> a	Classification: _____ No. of streets: _____	
<input type="checkbox"/> b	Construction: _____ Comb: _____ Non-comb: _____ (F.S.R.: Wall 150, Ceiling 25 Max)	
<input type="checkbox"/> c	Fire rated assembly above _____ Hours: _____ Design no. _____	
<input type="checkbox"/> d	Fire rated assembly below _____ Hours: _____ Design no. _____	
<input type="checkbox"/> e	Sprinklered _____ (DWG's may be required)	
<input type="checkbox"/> f	Fire alarm _____ (DWG's may be required)	
<input type="checkbox"/> g	Standpipe _____ (DWG's may be required)	
<input type="checkbox"/> h	Distance between exits _____	3.4.2.3
<input type="checkbox"/> i	Public corridor _____	3.3.1.9

3 MEZZANINE

<input type="checkbox"/> a	Mezzanine aggregate area: _____ m ² , Suite area: _____ m ² , MEZZ[%]	
<input type="checkbox"/> b	Mezzanine: _____ Storey _____ Not a Storey _____	3.2.1.1.(3) to (8)
<input type="checkbox"/> c	Vertical fire separation _____	3.2.8.1 & 3.2.8.2
<input type="checkbox"/> d	Egress facilities _____ Exits _____	3.3.1.5.(2) to (4) & 3.4.2.2

**OAA Part 3, Alterations Checklist
(For Group A-2, D, E or F Occupancies)**

—	e	Mezzanine rating _____ Hours _____ Design no: _____	
—	f	Stairs, landings, guards _____	3.4.6

4—OCCUPANCY REQUIREMENTS [General]

—	a	Area: _____ m ² Occupant Load: _____	3.1.16
—	b	Doorway from each suite into public corridor, exterior passageway or exterior exit door _____	3.3.1.3.(8)
—	c	Access to 2 separate exits _____	3.3.1.3.(9)
—	d	No. of egress from the suite and travel distance _____	3.3.1.5 & 3.3.1.6
—	e	Door swing & width _____	3.3.1.10 to 3.3.1.12
—	f	Capacity of access to exits _____	3.3.1.16
—	g	Electromagnetic locking d(Not permitted — panic hardware, F1) _____	3.3.1.12.(10)
—	h	Emergency lighting _____	3.2.7.3 & 3.2.7.4
—	i	Exit signs _____	3.4.5
—	j	Plumbing facilities _____	3.7.4
—	k	X-ray installations — Ministry of Health/Labour _____	Letter / 3.7.5.3
—	l	Barrier free requirements _____	3.8
—	m	Suite entrance _____ Vestibule (Dimensions) _____	3.8
—	n	Washrooms required _____ Layout (Dimensions) _____	3.8
—	e	Latchside clearances on doors with closures _____	

5 FIRE SEPARATIONS

—	a	Between occupancies _____ [Major occupancy F.S. & Suite F.S.]	3.1.3.1, 3.1.3.2 & 3.3.1.1
—	b	Public corridor _____ F.S. [If glass door — Latch detail]	3.3.1.4 & 3.1.8.13
—	c	Service rooms (boiler, mech), janitors rooms _____	3.6.2 & 3.3.1.20
—	d	Shaft _____	3.6.3
—	e	Fire stopping _____	3.1.11.2 to 3.1.11.7

**OAA Part 3, Alterations Checklist
(For Group A-2, D, E or F Occupancies)**

—	f	Storage garage	3.3.5.6
—		_____	
—		_____	
—	g	Repair garage	3.3.5.5
—		_____	
—		_____	

A-2: [FOR SCHOOLS USE PART 3 GENERAL CHECKLIST]

—	a	Restaurant > 30 seats [A-2]	3.1.2.6
—		_____	
—		_____	
—	b	Dept of Health approved drawings (co-ordinate)	
—		_____	
—		_____	
—	c	Design occ. load > table 3.1.16. A, seating layout required.	
—		_____	
—		_____	
—	d	Licensed establishment restaurant occ. load > 150, Fire alarm	3.2.4.1.(2) (g)
—		_____	
—		_____	
—	e	Food premises	3.7.6
—		_____	
—		_____	
—	f	Occ. load > 300, fire alarm & signal to fire dept.	3.2.4.1 & 3.2.4.7
—		_____	
—		_____	
—	g	Occ. load > 100, panic hardware / fire exit hardware	3.3.2.6, 3.4.6.15
—		_____	
—		_____	
—	h	Restaurant seating > 40, staff washroom [min. 2.33 m ²]	3.7.4.3.(7) & 3.7.6.6.(2)
—		_____	
—		_____	
—	i	Washroom locations: indirect access, in restaurant or within 45m td	3.7.6.3
—		_____	
—		_____	
—	j	Handwashing lavatory for employees	3.7.6.4.(1)
—		_____	
—		_____	
—	k	Exemption for retail food premises	3.7.6.4.(3)
—		_____	
—		_____	
—	l	If dead-end corridor, 2 nd egress not in dead-end	3.3.1.9.(8)
—		_____	
—		_____	
—	m	Wheelchair spaces in seating area	3.8.2.1.(4)
—		_____	
—		_____	

D,E,F-2 AND F-3

—	a	Dead-end public corridor max 9m, occ. load = 30 max; self-closing doors	3.3.1.9.(11).(12). (13).(a)
—		_____	
—		Or	
—	b	Second egress not leading into the dead-end	3.3.1.9.(11).(12). (13).(b)
—		_____	
—		_____	
—	c	Cutting/welding other than in F: 1hr F.S. / auto-extinguishing system	3.3.1.24
—		_____	
—		_____	
—	d	Occ. load > 300 total or > 75 above or below first storey, fire alarm	3.2.4.1.(2) (d) (h)
—		_____	
—		_____	

F-4

—	a	Occ. load > 25, fire alarm & signal to fire dept	3.4.2.1.(j) & 3.2.4.7
—		_____	
—		_____	
—	b	Automatic fire-extinguishing system	3.3.5.2
—		_____	
—		_____	

**OAA Part 3, Alterations Checklist
(For Group A-2, D, E or F Occupancies)**

—	e	Minimum 2 egress [$>15m^2$] _____	3.3.1.5.(1).(a)
—	d	Panic hardware on exit doors / fire exit hardware _____	3.4.6.15.(2).(e)
—	e	Electromagnetic locking devices not permitted _____	3.3.1.12.(3) & 3.4.6.15.(4)
—	f	Travel distance maximum _____	3.4.2.5.(1).(a)
—	g	If dead-end corridor, second egress not in dead-end _____	3.3.1.9.(14)

ADDITIONAL REQUIREMENTS FOR HAZARDOUS MATERIALS

—	a	Refer to fire code requirements _____	3.3.1.2
—	b	No volatiles in the basement _____	3.3.5.3
—	e	Flammable liquids: Quantity: _____ L: _____ Flashpoint: _____ C: _____	Fire Prevention
—	d	Cabinet Storage: _____ Quantity: _____ L: _____	Fire Code
—	e	MSDS (material safety data sheet) may be required _____	Occupational Health and Safety
—	f	Room _____ F.S. _____ Hr. Density: _____ L/m _____	Fire Code
—	g	Closures: _____ Hr. _____ Curb at door _____	Fire Code
—	h	Chemical catchment tank [Co-ord. With Plumb.] _____	
—	i	Explosion venting _____ Vent area: _____ m^2 _____	Fire Prevention
—	j	Release pressure: _____ kN/m^2 , Structural review for walls & / slab(s) _____	
—	k	Paint spray room [co-ord with mech.] _____	Fire Code
—	h	Dept. of labour approval required _____	

OAA Part 3, Buildings

Drawings Reviewed: (titles plus dates)	Project Name: _____
	Project Number: _____
	Review By: _____ Date: _____
	Approved By: _____ BCDN: _____

Legend: ☐ **N** Not required ☐ **R** Required ☐ **C** Confirm requirements or construction detail(s) ☐ **RC** Review completed and item indicated on documents

This checklist is intended to assist architects in a review of code requirements to be considered in the preparation and review of documents to support a permit application. A simple review of the checklist is not a substitute for a thorough review of the OBC. Modify the checklist to note applicable code requirements for the project.

1. PERMIT SUBMISSION DOCUMENTS		OBC Code Reference(s)
_____ a	Professional design stamps & signatures	2.3.4
_____ b	General review commitment letter	2.3.2

2. SIZE & OCCUPANCY REQUIREMENTS		OBC Code Reference(s)
_____ a	Major occupancy (ies)	Table 3.1.2.1, 3.1.2
_____ b	Building area	4.1.3.2 & 3.2.2.5
_____ c	Number of storeys	3.2.1 & 3.2.2.5
_____ d	Number of streets	3.2.2.10.(1) to (5)
_____ e	Building sprinklered	3.2.5.13
_____ f	Classification	3.2.2.20 to 3.2.2.83
_____ g	Type of construction required	3.1.4/3.1.5
_____ h	Storeys below ground	3.2.2.15.(1) to (3)
_____ i	Fire containment in basements [600m ²]	3.2.1.5.(1) & (2)
_____ j	Crawl space	3.2.2.9.(1) & (2)
_____ k	Floor assembly over basement (min. 3/4hr)	3.2.1.4.(1)
_____ l	Other floor assemblies (mezz. as a storey)	3.2.1.1.(6)
_____ m	Mezzanines/exterior passageways	3.2.1.1/3.2.2.12
_____ n	Roof assembly F.R.R. (sprinkler exception)	3.2.2.17

OAA Part 3, Buildings

—	e	Roof supporting an occupancy — F.S.	3.2.2.13
—	p	Load bearing walls and columns	3.2.2.20 to 3.2.2.83
—	q	High buildings	3.2.6

3. SPATIAL SEPARATION

—	a	Protection of exit facilities	3.2.3.12
—	b	Wall exposed to another wall	3.2.3.13.(1) & (2) & (3)
—	c	Wall exposed to adjoining roof	3.2.3.14
—	d	Protection of exposed soffit	3.2.3.15.(1) to (4)
—	e	Canopy projection [E,F1,F2]	3.2.3.16
—	f	Covered vehicular passageway	3.2.3.17
—	g	Buildings connected by walkways	3.2.3.18
—	h	Underground walkway	3.2.3.19

4. PROVISIONS FOR FIRE FIGHTING

—	a	Access above grade	3.2.5.1.(1) to (3)
—	b	Access to basements	3.2.5.2.(1) & (2)
—	c	Roof access	3.2.5.3
—	d	Access routes	3.2.5.4 to 3.2.5.6
—	e	Sprinklers: [NFPA 13/NFPA 13R/NFPA 13D]	3.2.5.13 to 3.2.5.15
—		: Basement > 600m ²	3.2.1.5
—		: > 1 storey below ground	3.2.2.15.(2) & (3)
—		: Garage below grade (except open storey)	3.3.5.4.(7)
—	f	Fire alarm system required [CAN/ULC S524]	3.2.4
—	g	Standpipe system required [NFPA 14]	3.2.9

5. REQUIREMENTS FOR MEZZANINES

_____	a	Mezzanine area: _____ Suite or floor area: _____ Mezz: _____	
_____	b	Mezzanine (not a storey) _____	3.2.1.1.(3) to (8)
_____	c	Termination at vertical fire separation _____	3.2.8.1 & 3.2.8.2
_____	d	Egress facilities / exits _____	3.3.1.5 & 3.4.2.2

6. SAFETY REQUIREMENTS WITHIN FLOOR AREAS

_____	1)	Means of egress	
_____	a	Egress from roof, platform, podium _____	3.3.1.3.(3) to (4)
_____	b	Egress roof enclosure, 2 egress if > 200m ² _____	3.3.1.3.(5) & (6)
_____	c	Egress from service space _____	3.3.1.3.(7)
_____	d	Each suite to have exterior exit doorway or doorway into a public corridor or exterior passageway _____	3.3.1.3.(8)
_____	e	Access to 2 separate exits in opposite directions _____	3.3.1.3.(9)
_____	f	Adequate egress width from rooms (Occ. Load x 6.1, 9.2, or 18.4mm) _____	3.3.1.16
_____	g	Egress from dwelling units _____	3.3.4.4.(1) to (8)
_____	h	Min 2 egress doorways [F1 or occ.load > 60 or hazardous classroom > 100m ²] _____	3.3.1.5.(1): Tables 3.3.1.5A & B
_____	i	Travel distance within the room or suite when > 1 egress _____	3.3.1.6
_____	2)	Dead End Corridors	
_____	a	Assembly Occupancy: second and separate egress from each room or suite not leading into a dead-end corridor _____	3.3.1.9.(8)
_____	b	Institutional: second and separate egress _____	3.3.3.3.(1)
_____	c	Residential: dead-end 6m max., serves max. 4 suites, no door openings to service rooms or hazardous rooms _____	3.3.1.9.(9) & (10)
_____	d	D, E, F-2 or F-3: dead end corridor 9m max., max. 30 occupants, self closers on doors or second and separate egress door not leading into a dead-end corridor _____	3.3.1.9.(11) to (13)
_____	e	F-1: second and separate egress doorway _____	3.3.1.9.(14)
_____	3)	Corridors	
_____	a	Fuel fired appliances prohibited in corridor access to exit _____	3.3.1.2.(3)
_____	b	Headroom: min _____	3.3.1.8 & 3.4.3.6
_____	c	Width: min 1100 mm _____	3.3.1.9
_____		: min 2400 mm serving patients _____	3.3.3.3.(2)

OAA Part 3, Buildings

		_____ : Min 1650 mm B2 or B3 occupancy _____	3.3.3.3.(3)
		d _____ Adequate exit capacity leading to exits (Occ. Load x 6.1, 9.2, or 18.4mm) _____	3.3.1.16
	4)	Doors	
		a _____ 800 mm (1 leaf) min clear opening _____	3.3.1.12.(1)
		b _____ Operable without keys _____	3.3.1.12.(2)
		c _____ No automatic locking device on res. suite (hotel excepted) _____	3.3.4.5
		d _____ Electromagnetic devices [not permitted in schools or F-1] _____	3.3.1.12.(10)
		e _____ Panic hardware [Group A _____ occ load >100] _____	3.3.2.6
		f _____ Door swing on vertical axis from suite or room not in suite _____	3.3.1.10.(1)
		g _____ Swing in direction of exit [F1, occ load >60, door in a corridor or exit] _____	3.3.1.10.(2) & (3)
		h _____ Sliding doors _____	3.3.1.11.(1) to (3)
	5)	Ramps, stairways, passageways _____	3.3.1.13 & 3.4.6
	6)	Guards	
		a _____ Min. 1070 mm guards at roof, smoke shaft, balcony, etc. _____	3.3.1.17
		b _____ Max. 100 mm spacing, (max. 200 mm for F occupancies) _____	3.3.1.17.(3) & (4)
		c _____ Non-climbable (140mm-900mm) _____	3.3.1.17.(5)
		d _____ Guards within dwelling units _____	3.3.4.7 & 9.8
	7)	Transparent doors and panels _____	3.3.1.18
	8)	Sound transmission in dwelling units _____	3.3.4.6 & 9.11.2.1
	9)	Flammable liquids/hazardous substances _____	3.3.1.2 / Fire Code
	10)	Volatiles prohibited in basements _____	3.3.5.3.(1) to (3)
	11)	Explosion venting _____	3.3.1.19
	12)	Garage vestibules _____	3.3.5.7
	13)	Protection of floor areas with a barrier-free path of travel (see exception) _____	3.3.1.7

7. REQUIREMENTS FOR EXITS

— —	a	Adequate exit capacity for each floor (Occ. Load x 6.1, 9.2 or 18.4)	3.1.16.1 & Table 3.1.16.1
— —	b	Minimum of 2 exits	3.4.2.1.(1) to (7)
— —	c	One exit exception	3.4.2.1.(2)
— —	d	Distance between exits	3.4.2.3.(1) & (2)
— —	e	Location of exits	3.4.2.5.(1) to (5)
— —	f	Clear path of travel from exit to a safe public space	1.1.3.2
— —	g	Clear width of exit, corridor, stair	3.4.3.1.(1) to (3)
— —	h	Required minimum exit width	3.4.3.2 to 3.4.3.4
— —	i	Reduction of exit width	3.3.1.9 & 3.4.3.5
— —	j	Headroom clearance	3.4.3.6.(1) to (4)
— —	k	Flame spread rating for exit & exit lobby	3.1.13 & Table 3.1.13.2
— —	l	Fire separation of exits	3.4.4.1 to 3.4.4.4
— —	m	Integrity of exits (schools—not as an “access corridor”) (no service penetrations)	3.4.4.4.(1) to (10)
— —	n	Exit signs and markings	3.4.5.1.(1) to (8)
— —	o	Sign for basement stair	3.4.5.2
— —	p	Non-skid finish on stairs/ramps	3.4.6.1.(1) & (2)
— —	q	Minimum 3 risers	3.4.6.2
— —	r	Maximum rise 3.7 m per flight (2.4m for B2)	3.4.6.3.(1)
— —	s	Length and width of landing	3.4.6.3.(2)
— —	t	Number and height of handrail	3.4.6.4.(1) to (10)
— —	u	Height and opening on guards	3.4.6.5.(1) to (8)
— —	v	Gradient and level area for ramp	3.4.6.1 & 3.4.6.6
— —	w	Treads and risers	3.4.6.7.(1) to (5)

OAA Part 3, Buildings

—	x	Curved stair (winders not permitted)	3.4.6.8.(1) & (2)
—	y	Horizontal exits [not permitted in schools divided by firewalls]	3.4.6.9, 3.4.1.6
—	z	Door swing	3.3.1.10 & 3.4.6.11
—	i	Sliding door in exit	3.3.1.11 & 3.4.6.13
—	ii	Panic hardware/fire exit hardware	3.4.6.15
—	iii	Emergency access (every 5 storeys)	3.4.6.17

8. FIRE SEPARATION BETWEEN OCCUPANCIES, TENANTS, ROOMS AND SHAFTS

—	a	Fire separation between occupancies	3.1.3.1 & Table 3.1.3.1
—	b	Prohibited combination of occupancies	3.1.3.2
—	c	Support of fire separation	3.1.7.5.(1) to (3)
—	d	Fire wall	3.1.10
—	e	Opening in fire wall	3.1.10.5 & 3.1.8.6
—	f	Fire separation between suites	3.3.1.1 & 3.3.4.2
—	g	Fire separation of public corridor	3.3.1.4
—	h	F.S. of corridors used by public in "A"	3.3.2.5
—	i	Fire separation of janitors' rooms (nonrated in sprinklered floor area)	3.3.1.20
—	j	Fire separation of A1 occupancy, schools: O.L. >200; hazardous rooms	3.3.2.2
—	k	Fire separation of book storage room in libraries & stages	3.3.2.11 & 3.3.2.12
—	l	Separations in care and detention occupancies	3.3.3.2 & 3.3.3.5
—	m	Separations in treatment facilities & contained use areas	3.3.3.6 & 3.3.3.7
—	n	F.S. of storage rooms in "C" occupancies	3.3.4.3
—	o	Fire separation of repair garage	3.3.5.5
—	p	Fire separation of storage garage	3.3.5.6

OAA Part 3, Buildings

— q —	Fire separation of vertical transportation facilities & elevator machine room	3.5.3
— f —	Service room fire separation	3.6.2.1 & 3.6.2.2
— s —	Incinerator & garbage room fire separation	3.6.2.5 & 3.6.2.6
— t —	F.S. of transformer vault 3 hr.....2hr.....[sprinklers]: solid masonry or concrete	3.5.2.8.(1)
— u —	Shaft fire separation	Table 3.6.3.1
— v —	Fire separation at top & bottom of shaft	3.6.3.1.(2) & (3)
— w —	F.S. of linen or refuse chute shaft	3.6.3.3.(2)
— x —	Discharge room: linen — 1hr.; Refuse — 2hr	3.6.3.3.(7) & (9)
— y —	Intake opening room ¾ hr.	3.6.3.3.(5)
— z —	Horizontal service space fire separation	3.6.4.2

9. OPENINGS IN FIRE SEPARATION

— a —	Vertical f.s. to the u/s of floor/roof deck	3.1.8.3
— b —	"Membrane" exception [NOT FOR SHAFTS]	3.6.4.2.(2)
— c —	Protection rating of closures	3.1.8.4.(2)
— d —	Max opening in interior fire separation	3.1.8.6.(1) & (2)
— e —	20 min closure	3.1.8.10.(1) to (3)
— f —	Self closers & hold-open devices	3.1.8.11 & 3.1.8.12
— g —	Door latches [glass door in unrated F.S.]	3.1.8.13
— h —	Wired glass & glass block — untested [1 hr. max. fixed wired glass, dim, structural mullions at 7.5 m2 max.]	3.1.8.14.(2) & 5G-2
— i —	Temp. rise limit [exit doors in > 3 storey, firewalls, dead end corridors]	3.1.8.15 & 3.1.8.17
— j —	Area limits for wired glass or glass block [exits, dead end corridors and firewalls]	3.1.8.16 & 3.1.8.17
— k —	Interconnected floor spaces [F.S. at the upper floor in schools]	3.2.8.1 to 3.2.8.11

10. FIRE STOPPING

— —	a	Service penetrations —	3.1.9.1.(1) & (2)
— —	b	Concealed spaces —	3.1.11.1
— —	c	Wall assemblies —	3.1.11.2.(1) & (2)
— —	d	Between nailing & supporting elements —	3.1.11.3.(1) & (2)
— —	e	Between vertical & horizontal spaces —	3.1.11.4.(1)
— —	f	Roof spaces, balconies and canopies —	3.1.11.5 & 3.2.3.16
— —	g	Crawl spaces —	3.1.11.6
— —	h	Fire stop assemblies as per ULC listings —	3.1.11.7.(1) to (6)

11. SERVICE SPACES

— —	a	Storage use prohibited —	3.6.1.3
— —	b	No boiler under required exits —	3.6.2.3
— —	c	Requirement for garbage storage —	SPA
— —	d	Door swing for boiler room —	3.6.2.7
— —	e	Ceiling spaces used as plenums —	3.6.4.3.(1) to (3)
— —	f	Access to attic, service spaces, crawlspace —	3.6.4.4 to 3.6.4.6
— —	g	Roof anchor systems (details for buildings over 6m high) —	4.1.10.8

12. HEALTH REQUIREMENTS

— —	a	Room dimensions in dwelling units —	3.7.1.2 & 9.5
— —	b	Sleeping area in group B occupancy —	3.7.1.3.(1) & (2)
— —	c	Sleeping area in child care facility —	3.7.1.3.(3)
— —	d	Window in every sleeping room —	3.7.2.1
— —	e	Fixed windows in dwelling units —	3.7.2.2.(2)
— —	f	Guard protection @ openable windows in dwelling units —	3.7.2.2.(3)
— —	g	Plumbing facilities —	3.7.4

— — —	h	Installation of X-ray machines [M.O.H./M.O.L.] —	3.7.5.3
— — —	i	Public pools [see separate checklist] —	3.11

13. EMERGENCY LIGHTING

— — —	1)	Emergency Lighting of 10 lx for a— Exits — b— Principal routes—access to exit in an open floor area — c— Corridors used by the public, serving classrooms, patients' sleeping rooms & public corridors — d— Underground walkways — e— Group A1 occupancy — f— Group A2 & A3 if occ. Load > 60 — g— Service space —	3.2.7.3.(1) to (3)
— — —	2)	Emergency power supply of: a— 2 hour capacity for building in 3.2.6 — b— 1 hour for group B not under 3.2.6 — c— ½ hour for all other buildings —	3.2.7.4.(1)

14. BARRIER-FREE DESIGN

— — —	a	When required —	3.8.1.1
— — —	b	Accessible entrance & number required —	3.8.1.2
— — —	c	Areas requiring B.F. path of travel —	3.8.1.3.(1) to (5)
— — —	d	Barrier-free path of travel [1060 mm min with 1600 x 1600 by-laws @30m intervals] —	3.8.2.1
— — —	e	Access to parking areas [2100mm clear headroom] —	3.8.2.2
— — —	f	Access to storey served by escalator —	3.8.1.4
— — —	g	Wheelchair space in seating area —	3.8.2.1.(4)
— — —	h	Washrooms —	3.8.2.3.(1) to (3)
— — —	i	Accessibility signs —	3.8.3.1.(1) to (4)

OAA Part 3, Buildings

— — —	j	Exterior walks [1100 mm min.] _____	3.8.3.2.(1) to (4)
— — —	k	Doors and vestibules in B.F. Access _____	3.8.3.3.(1) to (15)
— — —	l	Latch side clearances [door with closers] _____	3.8.3.3.(11)
— — —	m	Ramps in a barrier-free access [870 mm clear; 1:2] _____	3.8.3.4.(1) to (3)
— — —	n	Elevators _____	3.5.4.1 & 3.8.3.5
— — —	o	Water closet and stall [dimensions] [1.5m x 1.5m] _____	3.8.3.8 to 3.8.3.11
— — —	p	Special washrooms [dimensions 1500 mm circle] _____	3.8.3.12
— — —	q	Showers in "A" occupancy [dimensions— [1500 mm wide x 900mm] _____	3.8.3.13
— — —	r	Shelves or counters for telephones & drinking fountains _____	3.8.3.15 & 3.8.3.16

OAA Part 3, Portable Classrooms

Drawings Reviewed: (titles plus dates) _____	Project Name: _____ Project Number: _____ Review By: _____ Date: _____ Approved By: _____ BCDN: _____
---	--

Legend: N Not required R Required C Confirm requirements or construction detail(s) RC Review completed and item indicated on documents

This checklist is intended to assist architects in a review of code requirements to be considered in the preparation and review of documents to support a permit application. A simple review of the checklist is not a substitute for a thorough review of the OBC. Modify the checklist to note applicable code requirements for the project.

1. INDIVIDUAL PORTABLES [CASE 1 SEE OBC A-3.9.3]

OBC Reference(s)

— — —	a	Building area: 100m ² max. Height: 1 storey _____	Actual Area: _____ m ²	3.9.3.1.(1)
— —	b	Distance between classrooms \geq 6m _____		3.9.3.2.(1)
— —	c	Fire extinguishers _____		3.9.3.5 & 3.2.5.17
— —	d	Means of egress _____		3.3 & 3.4
— —	e	Min. 2 egress if no F.S. for fuel-fired appliance _____		3.9.3.6.(2)
— —	f	Fuel-fired appliance: fire separation exception one appliance min. 4.5m from door _____		3.9.3.7.(2)
— —	g	Washroom facilities: in the main building (WR analysis from school board) _____		3.9.3.8
— —	h	Spatial separation from the main building [* exposing bldg. face details main bldg.] _____		3.2.3
— —	i	Provisions for fire fighting _____ [] > 12 portables on site: _____		3.9.3.4

2. GROUP — PORTABLES [CASES 2 to 5 SEE OBC A-3.9.3]

— —	a	Distance between classrooms < 6m _____		
— —	b	Building area (Group) = _____ m ²		3.9.3.1.(2)
— —	c	"Group" classification = _____		3.2.2.24 to 28
— —	d	Construction requirements: _____		3.2.2.24 to 28
— —	e	Fire extinguishers = _____		3.9.3.5 & 3.2.5.17
— —	f	Means of egress _____		3.3 & 3.4

OAA Part 3, Portable Classrooms

— —	g	Fuel-fired appliance F.S. — 1.5 hr. [Dist. \leq 1.5 m] — 45 min. [Dist. $>$ 1.5 m] — no fire separation [Dist. \geq 6 m] on appliance within 4.5 m from door — no fire separation (appliance has sealed combustion, max. 4 portables & appliance located within 4.5 m from door	3.9.3.7.(2) (a) 3.9.3.7.(2) (b) 3.9.3.7.(3) 3.9.3.7.(4)
— —	h	Washroom facilities: In the main building (WR analysis from School Board)	3.9.3.8
— —	i	Barrier-free access	3.9.3.9
— —	j	Spatial separation from the main building [*exposing bldg. face details main bldg.]	3.2.3
— —	k	Spatial separation between portables	3.9.3.2.(2)
— —		⇒ Exceptions [Cases 3 to 5]	
— —	l	Fire alarm systems	3.9.3.3
— —		⇒ Exceptions [Cases 2 & 3]	
— —	m	Provisions for fire fighting	3.9.3.4
— —		⇒ Exceptions where maximum 12 Portables [Cases 1 to 5]	

OAA Part 3, Public Pool Supplemental Checklist

Drawings Reviewed: (titles plus dates) _____	Project Name: _____ Project Number: _____ Review By: _____ Date: _____ Approved By: _____ BCDN: _____
---	--

Legend: N Not required R Required C Confirm requirements or Construction detail(s) RC Review completed and item indicated on documents

This checklist is intended to assist architects in a review of code requirements to be considered in the preparation and review of documents to support a permit application. A simple review of the checklist is not a substitute for a thorough review of the OBC. Modify the checklist to note applicable code requirements for the project.

1. CLASS		OBC Reference(s)
—	a Class (A, B, indoor, outdoor)	3.11.2.1
—	b Occupant load ($d/2.5 + S/1.4$)	3.1.16.3.(1) & (2)
—	c Exemptions for club, camp or institutions	3.11.3.1.(2) & (3)
—	d Elevated pool decks	3.11.3.1.(11)

2. GENERAL REQUIREMENTS

—	a Attach general notes and advise Health Department / copy of M.O.H letter to contractor	
—	b Minimum water depth $\geq 0.75\text{m}$	3.11.3.1.(4) & (5)
—	c Bottom slopes	3.11.3.1.(6)
—	d Walls vertical to within 150mm of bottom if water depth $\leq 1.35\text{m}$	3.11.3.1.(8)
—	e Ledges	3.11.3.1.(10)
—	f Pool deck	3.11.3.1.(9) (12) to (14)
—	f Pool deck width (exemption)	3.11.3.1.(2)
—	h Recessed fittings for safety buoy line at 300mm where slopes exceeds 8%	3.11.3.1.(7)
—	i Mark deck in 100mm lettering indicating depth at deep, shallow and break between gentle and deep bottom slope points: in appropriate locations indicate in words "SHALLOW AREA" "DEEP AREA" for depth $\geq 2.5\text{m}$	3.11.3.1.(24)
—	j Light colour pool surfaces	3.11.3.1.(20)
—	k Notice / sign with 150mm lettering for 2.5m water depth or less to read: "CAUTION — AVOID DEEP DIVES" or "SHALLOW WATER — NO DIVING"	3.11.3.1.(25)
—	l Black disc 150mm diameter at deepest point	3.11.3.1.(21)

OAA Part 3, Public Pool Supplemental Checklist

—	m	Diving boards _____	3.11.4.1
—	n	Corresponding water depth in front of diving board _____	3.11.4.1.(6) to (8)
—	e	Clearance above board _____	3.11.4.1.(15)
—	p	Ladders or steps from pool _____	3.11.3.1.(18)

3. DRESSING, LOCKERS, SHOWERS AND TOILETS

—	a	Exemption for class A&B pool alternative facilities _____	3.11.9.1.(2) & (3)
—	b	Water closet, urinals, lavatories provided _____	3.7.1.2 & 3.11.9.1.(4)
—	c	Showers (1 per 40 bathers) _____	3.11.9.1.(5)
—	d	Showers for disabled _____	3.8
—	e	Showers beside pool deck _____	3.11.9.1.(6)
—	f	Privacy provisions (dressing area, showers, etc.) _____	3.11.9.1.(12) & (13)
—	g	Floor sloped in washroom, showers, passages _____	3.11.9.1.(9)
—	h	Lockable access to deck _____	3.11.3.1.(1B)

4. SERVICE ROOMS AND STORAGE

—	a	If room contains compressed chlorine gas provide gas tight 1 hr. fire separation at or above ground with outside exit door _____	3.11.11.1.(2)(a)
—	b	Chemical storage facility (refer to mechanical section for ventilation, hose bib and floor drain) _____	3.11.11.1.(2)(a)

5. EMERGENCY PROVISIONS

—	a	Emergency illumination (pool and rooms) _____	3.11.10.1.(4) to (6)
—	b	Emergency telephone _____	3.11.10.1.(7) & (8)
—	c	Emergency stop button _____	3.11.10.1.(12) to (14)

6. SPECIAL POOLS (carry out detailed Code review and inspection on the following:)

—	a	Public pool in the B2 and B3 occupancy ramped _____	3.11.5.1
—	b	Modified pool _____	3.11.6
—	c	Wave action pool _____	3.11.7

Building Code Project Code Review

©2025, 2008 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

OAA members are responsible for ensuring their projects comply with the Building Code Act and the building code and must not knowingly violate any federal, provincial, or municipal laws related to building construction, enlargement, or alteration. These obligations are set out in the regulations under the Architects Act. This Practice Tip provides general guidelines and steps to help members establish a structured approach to project code review. As each project is unique, members must tailor their review processes to align with the specific nature and requirements of their work.

Background

A systematic process for project code review can assist in the review and documentation of code matters through all stages of the design. Furthermore, integrating project code review in the early phases of a project's development will also reduce the possibility of later code related revisions to contract documents being required.

The process for code review is one aspect of an overall quality assurance program that should be integrated into the project's development. Comprehensive office procedures, best practices, and checklists can be of assistance in establishing and tracking project code requirements.

Code requirements which are recorded in a simple and standardized format should be available for review by all members of the project development team throughout the life of the project. Professional judgment will be required when developing the process for the recording and reviewing of code requirements for each project. Items such as the size and complexity of the project, the type of the construction proposed, the experience of the individuals involved in the design team and the location of the project should be considered when adapting standardized office procedures for use on each project.

Building permits are issued or rejected based on the information contained in the permit application submission. To avoid delays in the processing of permit applications and to reduce the chance of applications being rejected due to incompleteness, practices should ensure that all relevant code related information is included on documents supporting the application for a building permit. Practice Tip PT.03 Building Code Data Matrices provides templates for the information to be provided, as applicable, on the documents supporting the application for permit.

As the BC Data Matrices only summarize the major requirements, members should identify and document all additional code items to be addressed and establish an appropriate method of recording the analysis of these code items and the requirements for the project. Checklist templates may be an efficient method to note code items that are common to various building types. However, review and customization of a checklist template will be required to meet specific practice and/or project needs.

The establishment of a systematic approach will assist practices in the review of code related information in order to perform a building code analysis and develop the information to be included on documents supporting the application for building permit.

Suggested Procedure

It is good practice for the OAA member(s) exercising personal supervision and direction of the preparation of designs to consider the:

- Establishment and implementation of or the adherence to office policy on the use and updating of checklists or other form of documentation for project code review.
- Establishment and implementation of procedures to document a comprehensive code analysis and to update code requirements for projects.
- Establishment and implementation of the results of the code analysis in the drawings and specifications for the project.
 - As the building code typically states minimum dimensional requirements, members should consider construction tolerances when translating code requirements to the drawings and specifications.
- Transfer of appropriate portions of the code analysis to the Building Code Data Matrices for the project. Refer to Practice Tip PT.03.

It is good practice for the OAA member assigned to each project to:

- Consider the manner in which staff will be directed, code requirements documented, and work reviewed related to code requirements, taking into account the size, scope and complexity of the project.
- Set up a comprehensive checklist or other form of documentation for each specific project. This may be based on a previously developed template that is customized for the specific project. Identifying the code items that may or may not be appropriate to the various stages of development for each project will be useful.
 - It is suggested that OAA members review The Canadian Handbook of Practice (CHOP), Chapter 6.4: *Appendix J – Checklist – Life Safety Information to Include on Drawings: Architectural*. This checklist provides an overview of the life safety items that should be included on architectural drawings and hence provides a good road map to the associated code items that will be required to review. As this checklist is focused on life safety items, members should ensure all other code items applicable to the project are also reviewed, for example Energy Efficiency, Health Requirements and Barrier-Free Design, etc. Furthermore, members should review and coordinate Appendices K, L and M with consultants regarding life safety information to be included on Structural, Mechanical and Electrical drawings.
- Obtain a current copy of applicable municipal by-law(s) and application requirements for the building permit pertinent to the location of the project. Determine the extent of information that may be required on documents supporting the application for the building permit.
- Review all appropriate code sections to determine the scope of code related matters for the project and develop a suitably detailed analysis document to record the relevant information and code related decisions made pertinent to the project.

The process, as outlined below, does not address all aspects of code compliance for every building type. Instead the process is intended to act as a general guide to project code review. A detailed review of code requirements will be required and specific code requirements should be recorded and communicated as needed. A more detailed project code review may be appropriate early in the design process to take into account the specific requirements of some project types or the preferences of the project team.

1.0 Schematic Design Phase

Develop a general outline of items that affect building locations, physical layout and circulation patterns for the building(s) and site. Consider the following:

- Building(s) location, siting, and fire fighter access

- Building configuration and area
- Importance category and construction type
- Building occupancy(ies) and occupant load
- Spatial separation (eg unprotected openings and limiting distances) and fire separation requirements
- Exiting and washroom requirements
- Barrier-free design
- Fire suppression systems
- Use of combustible construction materials, and
- Resource conservation / energy efficiency
- Presence of hazardous materials

Record the code analysis and communicate project code requirements to team members. Establish a methodology to permit the continued updating, development and communication of project code review. Complete the review of code items appropriate for the project and the current level of development. Supplement the information with any additional project code details applicable to the project. Calculate statistical information in more detail once the design is resolved. Review earlier assumptions and adapt designs when required.

Invite consultants to review stated code requirements and to state the schematic code requirements relevant to their disciplines at this phase.

Note any project assumptions or decisions that are close to building code limits and determine if it is likely to go over or under that limit as the design progresses. For example, if the building area is close to 600 m², is it likely to get larger and require design as a Part 3 building or get smaller and be allowable as a Part 9 building? Similarly, is the occupant load likely to require a second exit or doors swinging in the direction of exit travel?

2.0 Design Development Phase

Review schematic design documents and verify that previously identified project information and code requirements remain applicable.

Confirm that the information contained in the project code review is appropriate for the level of design detail, the understanding of building systems and the selection of construction materials to date. Continue the development of detailed plans, preliminary building sections, outline specifications and the project code review. Consider the following expanded list of key code issues, while refining the code requirements reviewed in the schematic design phase:

- Building(s) location, siting, and fire fighter access
- Building configuration and area
- Importance category and construction type
- Building occupancy(ies) and occupant load
- Spatial separation (eg unprotected openings and limiting distances) and fire separation requirements
- Exiting and washroom requirements
- Barrier-free design
- Fire alarm and fire suppression systems
- Use of combustible construction materials
- Resource conservation / energy efficiency

- Compartmentalization and safety requirements within floor areas
- High building requirements (if applicable)
- Additional seismic and wind load requirements (if required)
- Mezzanine and interconnected floor space requirements
- Service spaces
- Health requirements
- Acoustic separation/sound transmission requirements for interior partitions and floor assemblies
- Lighting and emergency power, and
- Alternative solutions (if applicable)

Review the design and updated project code review with the client and municipal or other regulatory officials when appropriate, for example as part of the Site Plan Approval process.

Complete the review of code items identified as being appropriate for this stage of design development. Consider the following suggested procedures:

- Confirm occupancies, occupant loads, exit capacities and compartmentalization before verifying that travel distances and exit capacities are adequate.
- Confirm building classification, major occupancy separations, structural fire resistance ratings and exterior wall constraints prior to finalizing material and system selections
- Review methods of compliance toward resource conservation and minimum energy efficiency requirements. Coordinate with MEP consultants to perform preliminary calculations to confirm specified systems and materials can meet efficiency requirements.
- Continue to review with consultants the stated code requirements and the code requirements relevant to their disciplines at this phase.

Minimize potential conflicts in the development of construction documents by preparing a comprehensive list of all code requirements at the completion of the design development phase.

3.0 Construction Document Phase

Review and verify that the design development documents prepared to date are in keeping with the project code review.

Continue the development of building details, specifications and the project code review. Complete the review of code items appropriate for this stage of documentation. Consider the following code requirements:

- Openings in fire separations and required closures (including fire and smoke dampers)
- Firestopping requirements
- Stair, ramp, handrails and guard detail requirements
- Door, window, and hardware detail requirements, and
- Flame-spread ratings of interior finishes.

Establish a list of submissions that will be required from the contractor to demonstrate the adequacy of construction materials, contractor qualifications and any test procedures that must be submitted to Chief Building Official. Summarize these requirements in the construction contract documents.

Include a summary of code requirements in the construction contract documents by entering the required information from the project code review into the appropriate BC Data Matrices (Refer to PT.03). Where appropriate, supplement the BC Data Matrix with a more detailed summary of specific code requirements for

each portion of the building. The expanded recording of code requirements and detailed calculations will assist the building officials to determine code compliance when reviewing the application for building permit.

Graphically demonstrate pertinent code features such as fire separations, fire resistance ratings, travel distances, exit capacity, and barrier-free paths of travel on plans, key plans and/or details. The graphic information will assist the contractor, trades, and inspectors in the construction and review of the work.

It is recommended that a final review of the documents, the BC Data Matrix, and pertinent project records relative to building code matters take place prior to sealing and signing the documents supporting the application for building permit.

It is common, particularly for large projects, to include a detailed building code report with the application for permit, often prepared by a code consultant. OAA members should review the building code report, at all applicable milestones, to confirm the interpretation of the code requirements applicable to the project. Members should then confirm that the requirements from the report are integrated accordingly into the drawings and specifications.

It is recommended to keep records of all comments received from the Chief Building Official and responses provided during the building permit process. The issued building permit should also be kept on file.

4.0 Contract Administration Phase

Review the roles and responsibilities of the client, contractor and holder as outlined in the building code and the *Architect's Act*. Review the Canadian Handbook of Practice (CHOP) and PT.05 General Review – Building Code and Non-Code Related Matters for further guidance on general review.

Continued code review and analysis will be required to be performed during the tender and contract administration phase for issues such as proposed substitutions and owner requested changes which may have code implications.

It is therefore good practice to manage documents representing matters governed by the building code and which are generated subsequent to the issuance of the building permit (e.g. addenda, change orders, and site review reports which will be submitted to the chief building official) in a manner similar to that for the documents supporting an application for building permit.

References

Ontario *Building Code Act*,

Ontario Building Code,

National Building Code,

Canadian Handbook of Practice (CHOP)

Practice Tip PT.03 Building Code Data Matrices

Practice Tip PT.05 General Review – Building Code and Non-Code Related Matters

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.

Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 4.2

From: Thomas Yeung, Vice President & PRC Chair

Date: May 2, 2025

Subject: OAA Document Maintenance - Practice Tips Impacted by changes to the OAA Regulatory Notices: Updates to Practice Tip PT.07.

Objective: To provide overview of the updates to *PT.07 Professional Opinion - Independent Opinion Reviewing a Project Prepared by Another Architect* (including a proposed title change) and obtain Council endorsement.

Background

The OAA's Practice Tips are accessed via the OAA website and, although written primarily for Architects and Licensed Technologists, 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.

In 2025, the [OAA posted updates to Regulatory Notices](#) to reflect changes in legislation and other housekeeping items. These updates resulted in the need to update multiple OAA Resources including PT.07.

Key Changes to the Practice Tip PT.07 (refer to Attachments 0, 1 and 2)

This Practice Tip was written to provide guidance to practices providing a review of the services already being provided to the client by another practice. Written in 2008, this Practice Tip underwent a minor update in 2018 to reference the then new *Construction Act*.

The resource was reviewed as part of the launch of the OBC 2024 launch and other changes were identified such as Licensed Technologist legislation as well as review against the updated [Regulatory Notice RN.10 Professional Opinion & Independent Opinion](#) which was updated earlier in 2025.



In keeping with the role of the Practice Resource Committee (PRC), the members of the PRC are involved in the review of the Practice Tips in consultation with the Practice Advisory Services Team. To assist the PRC in their review of amendments to PT.07 the attached Summary document was provided to the committee along with the red-lined document. See Appendix 0 which provides a high level summary of the changes as well as the process of review.

Next Steps - Communication Plan and Withdraw Previous Version

In tandem with the OAA's Communication team, staff from PAS will work on the following items to support the release of the updated resource following Council's review:

- Update to the OAA website, including edits to other associated resources such as [PT.00 Index to Practice Tips](#).
- Coordinate the change to the resource with other OAA Programs/ Service Areas (i.e. OAA Admission Course, Practice Consultation Services Program).
- Communications to Members: The updated Practice Tip will be posted on the website, featured in an upcoming issue of the OAA's Practice Advisory Newsletter as well as social media.

Action

Council is asked to consider the following motion:

It was moved by Yeung and seconded by That Council to endorse the revised OAA Practice Tip PT.07 Professional Opinion - Independent Opinion Reviewing a Project Prepared by Another Holder as presented to Council on May 13, 2025.

Attachments

- Attachment 0: Executive Summary (Main Technical and Editorial Changes to PT.07)
- Attachment 1: REDLINE - PT.07 Professional Opinion - Independent Opinion Reviewing a Project Prepared by Another Architect (version 2.1)
- Attachment 2: PT.07 Professional Opinion - Independent Opinion Reviewing a Project Prepared by Another Holder (version 2.2)

Practice Tip PT.07 - Professional Opinion - Independent Opinion - Reviewing a Project Prepared by Another Holder (New Proposed Title)

Executive Summary

The OAA's Practice Tips are accessed via the OAA website and, although written primarily for OAA Licensed members, 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.

Updated May 2, 2025

Background

This Practice Tip was written to provide guidance to practices providing a review of the services already provided to the client by another practice.

Written in 2008, it underwent a minor update in 2018 to reference the then new *Construction Act*.

The resource was reviewed as part of the launch of the OBC 2024 launch and other changes were identified such as Licensed Technologist legislation as well as review against the updated Regulatory Notice RN.10 Professional Opinion & Independent Opinion which was updated earlier in 2025.

Requirement to Update

- This Practice Tip needed to be reviewed against the updated Regulatory Notice RN.10 Professional Opinion & Independent Opinion to ensure that the two documents were not inconsistent.
- The previous version was not inclusive of Licensed Technologists.
- References to CHOP needed to be updated from version 2 to version 3.

Overview of the Process and Input from Various Parties

- PAS prepared a draft for PRC review.
- After discussion with PRC, PRC's comments were considered and incorporated into the draft as appropriate.
- The Registrar and the Executive Director were also consulted during the maintenance exercise.

Organization of PT.07 & Proposed Changes

Proposed Updates to Title of Practice Tip:

- Remove "architect" – the resource is implicitly targeted at someone offering services to the public to evaluate the services of a colleague.

Proposed edits to Summary, Background Suggested Procedures, Definitions Sections

- Edits to distinguish among the practice providing the services being reviewed, the practice performing the review, and members acting in other roles such as expert witnesses.
- Replace "architect" and leverage alternatives such as "holder of a certificate of practice", CoP Holder, etc.
- General updates/formatting to the body of the Practice Tip
 - Minor editorial updates as required

- Some sentences which alluded to gender "his/her judgment" have now been made more neutral
- Grammar and other minor edits for legibility, etc.

Proposed edits in References Section

- Include reference to Regulatory Notice RN.10 Professional Opinion & Independent Opinion as well as updated Regulatory Notice RN.01 OAA Professional Seal
- Update References for CHOP version 3

Next Steps

- The revised OAA Practice Tip PT.07 is to be presented to Council on May 13, 2025 for review.

Professional Opinion - Independent Opinion - Reviewing a Project Prepared by Another **CoP Holder Architect**

©2025, 2018, 2008 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

There are a number of general and legal issues to consider when a certificate of practice (CoP) holder ~~architect~~ undertakes to provide a professional opinion —including: regulatory and contractual matters; confidentiality; ~~and~~ protecting the public interest; ~~and~~ —as well as the appropriate procedures to follow. The issues outlined in this document address the most common circumstances, ~~that is,~~ where the same client has retained both the CoP holder being reviewed ~~architect~~ and the reviewing holder ~~architect~~.

Not all of these issues will apply where: the client of the reviewing holder ~~architect~~ is a third party (such as a legal counsel, insurer, or an advocate holder ~~architect~~ retained by a user group); the client has retained the reviewing holder ~~architect~~ to advise legal counsel; or the reviewing holder ~~architect~~ is a member of a committee acting on behalf of an authority having jurisdiction.

Background

This document addresses the various circumstances and related issues where a professional opinion, by a reviewing ~~holder~~ ~~architect~~ of another CoP holder's ~~architect's~~ work, may be sought. These circumstances might include a client, an authority having jurisdiction, or a third party such as an insurer or legal counsel requesting the opinion.

Examples are:

- **Independent Opinion** where a reviewing holder ~~architect~~ reviews a project prepared by another CoP holder ~~architect~~ as part of a quality assurance process;
- **Expert Opinion** that is part of a formal mediation or judicial process;
- **Expert Witness** where an architect holder provides testimony as part of a judicial process;
- **Advocate Holder Architect** where the CoP holder ~~architect~~ acts as the representative of a client or user group;
- **Practice Review** where a consulting holder ~~architect~~ is retained to review an architectural firm's practices and procedures as part of a risk management strategy;
- **Design Critique** where a reviewing holder ~~architect~~ offers a reasoned opinion or evaluation of a specific design, acting on behalf of either a client, a or as a member of an authority having jurisdiction or ratepayer group, or as a member of an authority having jurisdiction' and;
- **Compliance Holder Architect** where a CoP holder ~~architect~~ is retained as part of a planning, design, and compliance (PDC) team to prepare project specific performance documents, with the client's input, and to evaluate compliance of a proponent's design with the client's guidelines and performance requirements, as is common in a Public Private Partnership (P3) project.

The focus of the opinion must be a factual and objective assessment of the relevant documents based upon a set of clear objectives and stated criteria.

Legal and Regulatory Issues and Procedures

The following procedures, in whole or in part, are generally applicable to most situations, but may differ in specific circumstances. Review the references identified in this document and, if appropriate, discuss with legal counsel.

Regulatory: Standards of Practice, Regulation 27 (as amended), under the *Architects Act*

The standards of practice do not prevent a reviewing holder-architect from accepting an engagement or being a member of a committee where the purpose is clearly different from that of the CoP holder being reviewed, for example, where a holder-architect is engaged to either provide testimony as an expert witness, or to advise legal counsel as part of a judicial process, or where related to a review process. The requirement for notification by the client does not apply in these situations, as the reviewing holder-architect is not being retained for the same purpose as the CoP holder being reviewed.

Where the reviewing holder or architect is contracted by the client, the intent of the Regulation is to permit the reviewing holder-architect to provide a professional opinion on the work of another CoP holder-architect **provided that the CoP holder architect whose work is being reviewed is notified in advance by the client**. Where the client cannot confirm in writing that the CoP holder-architect has been notified that an independent opinion is being sought, the reviewing holder-architect should decline the appointment. Where the client provides confirmation in writing the reviewing holder should confirm the scope of the review with the CoP holder.

The reviewing holder-architect should not go beyond the mandate of the committee of which he/she/the reviewing holder is a member, or beyond his/her/the reviewing holder's contracted mandate with the client. A change in the mandate should be made only with the express written authority of the client.

It is strongly recommended that the reviewing holder-architect not accept an offer to be engaged to succeed the CoP holder-architect whose work is being reviewed. The reviewing holder-architect could be seen as having solicited the work from the client contrary to the Regulation, having induced a breach of the contract between the client and the CoP holder-architect being reviewed, or having intentionally interfered in a contractual relationship.

Suggested Procedures

The following procedures are general and may differ in your-specific circumstances. These procedures relate to the scenario where the reviewing holder-architect is retained by the client. Where the reviewing holder architect is a member of a committee, or retained to advise legal counsel in a legal matter, parts of these procedures still apply.

Intent of the Review – Confirm and document in writing, the purpose for which the independent opinion is being sought. For example, the nature of the review may be identified in the original client/ CoP holder architect agreement at the outset of the project, as part of a risk management process. Or As another example, the request for the independent opinion could arise from issues or concerns identified during the course of the project. In those cases, the review could result in changes to the work or in legal actions. It is recommended that the purpose of the independent opinion be clearly set out in a written contract between the reviewing holder-architect and the client, and reiterated in any report produced by the reviewing holder architect.

Relevant Content/Tone – The reviewing holder's-architect's comments should be limited to the purpose of the review, and based on the content of the documents and services reviewed, including whether the reviewed CoP holder architect met the project standards, program and other requirements as identified at the outset of the review. Additionally, comments should make a comparison with as well as the standards of practice generally expected in the architectural profession. with citations of any documents referenced in coming to the opinion. The tone of the opinion should be objective, factual, and and professional, and not derogatory.

The reviewing holder architect should be temperate in his/her judgement and must assume professional responsibility for the his/her opinions expressed.

Project and Professional Standards – The standards upon which the opinion is based should be consistent with the standards, and other factors, that may have influenced the ~~CoP holder's architect's~~ work. The work of the ~~CoP holder architect~~ should not be judged according to the personal standards and methods of the reviewing ~~holder architect~~. The issue is whether, in the opinion of the reviewing ~~holder architect~~, the work of the ~~CoP holder architect~~ meets the client's needs, relevant regulatory requirements, and other stated criteria.

Those ~~other~~ factors could include the project budget, or lack of one, functional program, geographic location, special requirements, type of construction contract (e.g. design-build versus stipulated sum, etc.), and the role of the client and other consultants in the development of the work. Specific references to standards and legislation such as ~~the Building Code~~, *Architects Act* and Regulation thereunder, *Construction Act*, *Construction Lien Act*, OAA documents, local jurisdictional requirements, and ~~the~~ Canadian Handbook of Practice for Architects (CHOP) are advisable, wherever possible.

Scope of Review – State the scope of the review in writing at the outset. ~~That The scope~~ may include some of the following:

- Technical analysis including reviewing ~~instruments of service (i.e. drawings, specifications, and related documents)~~ for compliance with codes, standards, ~~applicable law, and~~ other regulatory requirements, ~~and the client's functional program requirements.~~
- Technical analysis including reviewing ~~drawings, specifications and related documents~~ instruments of service for compliance with project specific output performance documents, as in a P3.
- Level of completeness of ~~the instruments of service drawings, specifications and related documents~~ for the specific intended purpose (e.g. permit application, ~~bid call~~ tendering, construction, etc.).
- Identification of co-ordination issues, including co-ordination with other individual disciplines.
- Inconsistencies ~~(e.g. large scale drawing vs. details, specifications vs. drawings, typical vs. unique, etc.).~~
- Coordination with respect to installation of pre-manufactured products, (e.g. warranty issues).
- Issues related to the issuance of the building permit and municipal inspections, including contacting municipal officials and other authorities having jurisdiction.
- Meetings with the client, and other consultants, that discuss issues related to the content of the ~~drawings instruments of service~~ and the status of the project.
- Site visits to ascertain the status of the work under construction, and a review of general review ~~or other site visit~~ reports.
- Review of documents issued during the contract administration/construction phase.
- Potential problems, in particular any life safety issues requiring immediate attention, ~~and~~.
- Post construction review.

The reviewing ~~holder's architect's~~ scope of work should not include any service that the ~~CoP holder architect~~ being reviewed provided under ~~his/her~~ the CoP holder's contract with the client. The reviewing ~~holder architect~~ should be familiar with the Regulation under the *Architects Act* which prohibits soliciting or accepting work for the same project, the same client, and for the same purpose, where another ~~CoP holder architect~~ is already engaged.

The reviewing ~~holder architect~~ may offer an opinion on the project regarding compliance with approvals required by authorities having jurisdiction. It may be appropriate to identify the status of the work with respect to required approvals and whether or not information related to those approvals was incorporated into the instruments of service of the ~~holder architect~~. For example, any planning approvals, or requirements of authorities having jurisdiction (such as conservation authorities or utilities) that may be required at different stages of a project's development.

Procedure Checklist – The following checklist outlines the steps that should be taken in preparing an independent opinion:

Pre service Preparation

- Confirm with the client that the ~~CoP holder-architect~~ has been notified, in conformance with the Regulation under the *Architects Act*, that an independent opinion is being sought.
- Confirm with the CoP holder that their understanding of the scope of the review is consistent with that of the reviewing holder.
- Prepare a written contract that includes:
 - Purpose of the review, scope of the review, purpose that the findings and professional opinion will be used for, and any specific exclusions from the review.
 - Deliverables to be provided.
 - Criteria and standards to be applied to the review.
 - If known, a detailed list of documents to be reviewed, with the dates of issue and revision numbers.
 - Schedule of review.
 - Professional fees.
 - Distribution by client of findings and professional opinion.
- Identify and address any potential conflicts of interest. Refer to Regulation 27, Section 43 under the *Architects Act*. Where disclosure in writing of a conflict does not satisfy the requirements of Regulation 27, the assignment must be declined.
- Confirm whether the client has given the reviewing holder-architect the authority to review all documents related to the project, and to review the project with other parties including sub-consultants, contractors, and authorities having jurisdiction.
- ~~Confirm whether the CoP holder-architect has authorized the review of his/her the CoP holder's sub-consultant's services. Be aware that the holder-architect may consider that this sort of review or interview process undermines his or her the CoP holder's relationship with the sub-consultants and wrongly interferes with contractual arrangements with those parties. Exercise caution before any interviews with sub-consultants are undertaken. Such interviews may expose the reviewing holder-architect and the client to legal action.~~
- Where the client declines to have the reviewing holder-architect interview other parties, this restriction may limit the ability of the reviewing holder-architect to fully complete the review. This, and any other restrictions, should be clearly stated in the contract and any report, together with the potential implications for the findings and professional opinion, which the restrictions create.

Review and Findings

- Review all pertinent documents and, if authorized, ~~carry out~~ conduct meetings with other parties connected with the project.
- Assemble the review findings in the form of a written report, or as set out in the contract between the reviewing holder-architect and the client, with references to the specific documents reviewed or persons consulted.
- In order to clearly identify specific issues, it may be appropriate for the reviewing holder-architect to ~~'redline' and/or~~ annotate (a.k.a. 'redline') the drawings and other documents. ~~Permission must be obtained from the CoP holder being reviewed-architect for the reviewing holder-architect to copy any documents prepared by him/her for this purpose.~~
- Include details of all reference ~~standards documents~~ standards used in the evaluation (e.g. CSA standards, LEED, Building Code, OAA documents, applicable law, etc.).
- ~~The reviewing holder's-architect should be clear that his/her opinion will include the caveat~~ should include that the opinion was based upon the information (such as instructions, reports, drawings and data, etc.) provided to ~~him/her the reviewing holder.~~

- The reviewing holder's-architect's opinion should clearly identify the issue dates of all documents reviewed.
- If the reviewing holder-architect is of the opinion that changes to the work are necessary due to an immediate public safety issue (e.g. during construction), he/she/the reviewing holder should inform the client immediately.
- The reviewing holder-architect should advise his/her/the -client that their opinion is not binding upon the CoP holder being reviewed-architect. The client should consider the reviewing holder's-architect's findings, and any recommended changes or alternatives, in the context of public safety considerations to ensure that any recommendations are not in conflict with applicable codes and standards, do not risk damage or personal injury, or result in unworkable installations.
- If the reviewing holder-architect is requested may choose to affix their professional seal, or have affixed to the report and related documents, refer to Regulatory Notice RN.01 OAA Professional Seal. the professional seal of an architect or licensed technologist the reviewing holder provided that the report was prepared under the personal supervision and direction of a member architect or licensed technologist.

Definitions

Reviewing Holder-Architect: Is the a certificate of practice holder-Architect retained to prepare an independent opinion of another holder's-architect's services.

CoP Holder-Architect: a certificate of practice holder-Architect whose services are the subject of the review.

References

[Regulatory Notice RN.01 OAA Professional Seal](#)

[Regulatory Notice RN.10 Professional Opinion & Independent Opinion](#)

Canadian Handbook of Practice for Architects (CHOP) [Chapter 3.10 Section 2.1.10](#): Appendix "A" – **The Architect as Expert Witness** and [Appendix D – The Architect as Advocate Architect/ Compliance Architect/ Design Manager/ Researcher](#)

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.

Professional Opinion - Independent Opinion - Reviewing a Project Prepared by Another CoP Holder

©2025, 2018, 2008 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

There are a number of general and legal issues to consider when a certificate of practice (CoP) holder undertakes to provide a professional opinion including: regulatory and contractual matters; confidentiality; protecting the public interest; and the appropriate procedures to follow. The issues outlined in this document address the most common circumstance, that is, where the same client has retained both the CoP holder being reviewed and the reviewing holder.

Not all of these issues will apply where: the client of the reviewing holder is a third party (such as a legal counsel, insurer, or an advocate holder retained by a user group); the client has retained the reviewing holder to advise legal counsel; or the reviewing holder is a member of a committee acting on behalf of an authority having jurisdiction.

Background

This document addresses the various circumstances and related issues where a professional opinion, by a reviewing holder of another CoP holder's work, may be sought. These circumstances might include a client, an authority having jurisdiction, or a third party such as an insurer or legal counsel requesting the opinion.

Examples are:

- **Independent Opinion** where a reviewing holder reviews a project prepared by another CoP holder as part of a quality assurance process,
- **Expert Opinion** that is part of a formal mediation or judicial process,
- **Expert Witness** where a holder provides testimony as part of a judicial process,
- **Advocate Holder** where the CoP holder acts as the representative of a client or user group,
- **Practice Review** where a consulting holder is retained to review an architectural firm's practices and procedures as part of a risk management strategy,
- **Design Critique** where a reviewing holder offers a reasoned opinion or evaluation of a specific design, acting on behalf of either a client, a ratepayer group, or as a member of an authority having jurisdiction,
- **Compliance Holder** where a CoP holder is retained as part of a planning, design, and compliance (PDC) team to prepare project specific performance documents with the client's input, and to evaluate compliance of a proponent's design with the client's guidelines and performance requirements as is common in a Public Private Partnership (P3) project.

The focus of the opinion must be a factual and objective assessment of the relevant documents based upon a set of clear objectives and stated criteria.

Legal and Regulatory Issues and Procedures

The following procedures, in whole or in part, are generally applicable to most situations, but may differ in specific circumstances. Review the references identified in this document and, if appropriate, discuss with legal counsel.

Regulatory: Standards of Practice, Regulation 27 (as amended), under the *Architects Act*

The standards of practice do not prevent a reviewing holder from accepting an engagement or being a member of a committee where the purpose is clearly different from that of the CoP holder being reviewed. For example, where engaged to either provide testimony as an expert witness, to advise legal counsel as part of a judicial process, or where related to a review process. The requirement for notification by the client does not apply in these situations, as the reviewing holder is not being retained for the same purpose as the CoP holder being reviewed.

Where the reviewing holder is contracted by the client, the intent of the Regulation is to permit the reviewing holder to provide a professional opinion on the work of another CoP holder **provided that the CoP holder whose work is being reviewed is notified in advance by the client**. Where the client cannot confirm in writing that the CoP holder has been notified that an independent opinion is being sought, the reviewing holder should decline the appointment. Where the client provides confirmation in writing the reviewing holder should confirm the scope of the review with the CoP holder.

The reviewing holder should not go beyond the mandate of the committee of which the reviewing holder is a member, or beyond the reviewing holder's contracted mandate with the client. A change in the mandate should be made only with the express written authority of the client.

It is strongly recommended that the reviewing holder not accept an offer to be engaged to succeed the CoP holder whose work is being reviewed. The reviewing holder could be seen as having solicited the work from the client contrary to the Regulation, having induced a breach of the contract between the client and the CoP holder being reviewed, or having intentionally interfered in a contractual relationship.

Suggested Procedures

The following procedures are general and may differ in specific circumstances. These procedures relate to the scenario where the reviewing holder is retained by the client. Where the reviewing holder is a member of a committee or retained to advise legal counsel in a legal matter, parts of these procedures still apply.

Intent of the Review – Confirm and document in writing, the purpose for which the independent opinion is being sought. For example, the nature of the review may be identified in the original client/ CoP holder agreement at the outset of the project as part of a risk management process. As another example, the request for the independent opinion could arise from issues or concerns identified during the course of the project. In those cases, the review could result in changes to the work or in legal actions. It is recommended that the purpose of the independent opinion be clearly set out in a written contract between the reviewing holder and the client and reiterated in any report produced by the reviewing holder.

Relevant Content/Tone – The reviewing holder's comments should be limited to the purpose of the review and based on the content of the documents and services reviewed, include whether the reviewed CoP holder met the project standards, program and other requirements as identified at the outset of the review. Additionally, comments should make a comparison with the standards of practice generally expected in the architectural profession, with citations of any documents referenced in coming to the opinion. The tone of the opinion should be objective, factual, and professional; not derogatory.

The reviewing holder should be temperate in judgement and must assume professional responsibility for the opinions expressed.

Project and Professional Standards – The standards upon which the opinion is based should be consistent with the standards, and other factors, that may have influenced the CoP holder's work. The work of the CoP holder should not be judged according to the personal standards and methods of the reviewing holder. The issue is whether, in the opinion of the reviewing holder, the work of the CoP holder meets the client's needs, relevant regulatory requirements, and other stated criteria.

Those other factors could include the project budget or lack of one, functional program, geographic location, special requirements, type of construction contract (e.g. design-build versus stipulated sum, etc.), and the role of the client and other consultants in the development of the work. Specific references to standards and legislation such as the Building Code, *Architects Act* and Regulation thereunder, *Construction Act*, OAA documents, local jurisdictional requirements, and Canadian Handbook of Practice for Architects (CHOP) are advisable, wherever possible.

Scope of Review – State the scope of the review in writing at the outset. The scope may include some of the following:

- Technical analysis including reviewing instruments of service (i.e. drawings, specifications, and related documents) for compliance with codes, standards, applicable law, other regulatory requirements, and the client's functional program requirements,
- Technical analysis including reviewing instruments of service for compliance with project specific output performance documents, as in a P3,
- Level of completeness of the instruments of service for the specific intended purpose (e.g. permit application, tendering, construction, etc.),
- Identification of co-ordination issues, including co-ordination with other individual disciplines,
- Inconsistencies (e.g. large-scale drawing vs. details, specifications vs. drawings, typical vs. unique, etc.),
- Coordination with respect to installation of pre-manufactured products (e.g. warranty issues),
- Issues related to the issuance of the building permit and municipal inspections, including contacting municipal officials and other authorities having jurisdiction,
- Meetings with the client, and other consultants, that discuss issues related to the content of the instruments of service and the status of the project,
- Site visits to ascertain the status of the work under construction, and a review of general review or other site visit reports,
- Review of documents issued during the contract administration/construction phase,
- Potential problems, in particular any life safety issues requiring immediate attention, and
- Post construction review.

The reviewing holder's scope of work should not include any service that the CoP holder being reviewed provided under the CoP holder's contract with the client. The reviewing holder should be familiar with the Regulation under the *Architects Act* which prohibits soliciting or accepting work for the same project, the same client, and for the same purpose, where another CoP holder is already engaged.

The reviewing holder may offer an opinion on the project regarding compliance with approvals required by authorities having jurisdiction. It may be appropriate to identify the status of the work with respect to required approvals and whether or not information related to those approvals was incorporated into the instruments of service of the holder. For example, any planning approvals, or requirements of authorities having jurisdiction (such as conservation authorities or utilities) that may be required at different stages of a project's development.

Procedure Checklist – The following checklist outlines the steps that should be taken in preparing an independent opinion:

Pre service Preparation

- Confirm with the client that the CoP holder has been notified, in conformance with the Regulation under the *Architects Act*, that an independent opinion is being sought.
- Confirm with the CoP holder that their understanding of the scope of the review is consistent with that of the reviewing holder.

- Prepare a written contract that includes:
 - Purpose of the review, scope of the review, purpose that the findings and professional opinion will be used for, and any specific exclusions from the review,
 - Deliverables to be provided,
 - Criteria and standards to be applied to the review,
 - If known, a detailed list of documents to be reviewed, with the dates of issue and revision numbers,
 - Schedule of review,
 - Professional fees, and
 - Distribution by client of findings and professional opinion.
- Identify and address any potential conflicts of interest. Refer to Regulation 27, Section 43 under the *Architects Act*. Where disclosure in writing of a conflict does not satisfy the requirements of Regulation 27, the assignment must be declined.
- Confirm whether the client has given the reviewing holder the authority to review all documents related to the project, and to review the project with other parties including subconsultants, contractors, and authorities having jurisdiction.
- Confirm whether the CoP holder has authorized the review of the CoP holder's subconsultant's services. Be aware that the holder may consider that this sort of review or interview process undermines the CoP holder's relationship with the subconsultants and wrongly interferes with contractual arrangements with those parties. Exercise caution before any interviews with subconsultants are undertaken. Such interviews may expose the reviewing holder and the client to legal action.
- Where the client declines to have the reviewing holder interview other parties, this restriction may limit the ability of the reviewing holder to fully complete the review. This, and any other restrictions, should be clearly stated in the contract and any report, together with the potential implications for the findings and professional opinion, which the restrictions create.

Review and Findings

- Review all pertinent documents and, if authorized, conduct meetings with other parties connected with the project.
- Assemble the review findings in the form of a written report, or as set out in the contract between the reviewing holder and the client, with references to the specific documents reviewed or persons consulted.
- In order to clearly identify specific issues, it may be appropriate for the reviewing holder to annotate (a.k.a. 'redline') the drawings and other documents. Permission must be obtained from the CoP holder being reviewed for the reviewing holder to copy any documents for this purpose.
- Include details of all reference documents used in the evaluation (e.g. CSA standards, LEED, Building Code, OAA documents, applicable law, etc.).
- The reviewing holder's caveat should include that the opinion was based upon the information (such as instructions, reports, drawings and data, etc.) provided to the reviewing holder.
- The reviewing holder's opinion should clearly identify the issue dates of all documents reviewed.
- If the reviewing holder is of the opinion that changes to the work are necessary due to an immediate public safety issue (e.g. during construction), the reviewing holder should inform the client immediately.
- The reviewing holder should advise the client that their opinion is not binding upon the CoP holder being reviewed. The client should consider the reviewing holder's findings, and any recommended changes or alternatives, in the context of public safety considerations to ensure that any recommendations are not in conflict with applicable codes and standards, do not risk damage or personal injury, or result in unworkable installations.

- If the reviewing holder is requested to affix their professional seal to the report and related documents, refer to Regulatory Notice RN.01 OAA Professional Seal.

Definitions

Reviewing Holder: a certificate of practice holder retained to prepare an independent opinion of another holder's services.

CoP Holder: a certificate of practice holder whose services are the subject of the review.

References

Regulatory Notice RN.01 OAA Professional Seal

Regulatory Notice RN.10 Professional Opinion & Independent Opinion

Canadian Handbook of Practice for Architects (CHOP) Chapter 3.10: Appendix "A" – **The Architect as Witness** and Appendix D – The Architect as Advocate Architect/ Compliance Architect/ Design Manager/ Researcher.

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.

Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 4.3

From: Thomas Yeung, Vice President & PRC Chair

Date: May 2, 2025

Subject: OAA Document Maintenance: Updates to Practice Tip PT.15.

Objective: To provide overview of the updates to *PT.15 Consulting Contracts, Managing Changes, Scope Creep* and obtain Council endorsement.

Background

The OAA's Practice Tips are accessed via the OAA website and, although written primarily for Architects and Licensed Technologists, 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.

Key Changes to the Practice Tip PT. 15 (refer to Attachments 0, 1 and 2)

This [Practice Tip](#) was written to provide guidance to practices about managing changes in the scope of architectural services contracts. Written in 2009, the document underwent a minor update in 2020 to modernize the copyright notice, provide minor clarifications and add the disclaimer at the end of the Practice Tip. This round of updates is an opportunity to make a few housekeeping edits, leverage templates that didn't exist at the time of its creation and ease maintenance requirements in the future.

In keeping with the role of the Practice Resource Committee (PRC), the members of the PRC are involved in the review of the Practice Tips in consultation with the Practice Advisory Services team. To assist the PRC in their review of amendments to PT.07 the attached Summary document was provided to the committee along with the red-lined document. See Appendix 0 which provides a high level summary of the changes as well as the process of review.

Next Steps - Communication Plan, Withdraw Previous Version & Other Updates

In tandem with the OAA's Communication team, staff from PAS will work on the following items to support the release of the updated resource following Council's review:

- Update to the OAA website, including edits to other associated resources such as [PT.00 Index to Practice Tips](#).
- Coordinate the change to the resource with other OAA Programs/ Service Areas (i.e. OAA Admission Course, Practice Consultation Services Program).
- Communications to Members: The updated Practice Tip will be posted on the website, featured in an upcoming issue of the OAA's Practice Advisory Newsletter as well as social media.

PAS is also in the process of making some housekeeping edits to [OAA Standard Extra Services Contract Change Forms](#) which is referenced in the updated version of Practice Tip.15

Action

Council is asked to consider the following motion:

It was moved by Yeung and seconded by That Council to endorse the revised OAA Practice Tip PT. 15 Consulting Contracts, Managing Changes, Scope Creep as presented to Council on May 13, 2025.

Attachments

- Attachment 0: Executive Summary (Main Technical and Editorial Changes to PT.15)
- Attachment 1: REDLINE - PT.15 Consulting Contracts, Managing Changes, Scope Creep (version 1.1)
- Attachment 2: PT.15 Consulting Contracts, Managing Changes, Scope Creep (version 1.2)



Practice Tip PT.15 - Consulting Contracts, Managing Changes, and Scope Creep

Executive Summary

The OAA's Practice Tips are accessed via the OAA website and, although written primarily for OAA Licensed members, 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.

Updated May 2, 2025

Background

- This Practice Tip was written to provide guidance to practices about managing changes in the scope of architectural services contracts.
- Written in 2009, it underwent a minor update in 2020 to modernize the copyright notice, provide minor clarifications and add the disclaimer at the end of the Practice Tip.

Requirement to Update

- In light of the legislation pertaining to Licensed Technologists, this PT needed to be updated.
- Some of the wording was adjusted for greater clarity and to better reflect wording in the OAA 2021 Contract suite.

Overview of the Process and Input from Various Parties

- It was recognized that the Standard Extra Services or Contract Change Form template existed as an attachment to PT.15 and as a standalone document on the OAA website. To eliminate such duplication, it is recommended that Attachment 1 in the current version be deleted and a reference to the standalone document be added to the Practice Tip.
- The proposed changes were submitted for review and comment by PRC.

Organization of PT.15 & Proposed Changes

Proposed Updates to Title

- None proposed

Proposed Edits to the “Summary” Section

- Further explain reason why the Practice Tip should be of interest to practices
- Replace “architect” and use alternatives such as “certificate of practice holder”, “CoP holder”, etc.
- Incorporate minor clarifications
- Withdraw the 2009 contract change template included as an attachment to version 1.1 of the Practice Tip and instead reference the separate OAA Standard “Extra Services or Contract Change” form

Proposed Edits to the Background Section

- Replace “architect” and use alternatives such as “certificate of practice holder”, “CoP holder”, etc.
- Incorporate minor clarifications

Proposed Edits to the Suggested Procedures

- Replace “architect” and use alternatives such as “certificate of practice holder”, “CoP holder”, etc.
- Incorporate clarifications

Proposed Edits to References

- Include OAA Standard “Extra Services or Contract Change Form”.
- Include OAA 2021 Suite Contracts and Guides
- Update CHOP references to reflect latest version

Proposed Edits to Attachments

- Delete attachment of “Agreed Change to Architectural Services Contract Template” in favour of separate OAA Standard Extra Services or Contract Change Form

Next Steps

- The revised OAA Practice Tip PT.15 is to be presented to Council on May 13, 2025 for review.
- PAS to respond to PRC comments about the OAA Standard Form for Extra Services or Contract Change in anticipation of submitting the form to Council later.

Consulting Contracts, Managing Changes, and Scope Creep

©2025, 2009 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

Changes are often made to contracts for architectural services and to subcontracts for consulting services. Changes to construction contracts are typically made in writing and follow a well-defined change notice and change order process. Changes to architectural and consulting services under the pressure of the project schedule are too often done verbally with the expectation that the change will be formalized later. This can lead to disputes about fees for extra services, particularly toward the end of a project, and when the notice provisions of the contracts are not adhered to.

Holders of Certificates of Practice-practice (CoP) holders should notify the client and other consultants at the earliest possible time when changes in a project are identified which may result in a change in the scope of services, a change to the project cost, project schedule, and/or a change in the professional fees.

Holders-CoP holders should not proceed with changes without written authorization from the client, which includes a detailed description of the agreed change in scope of services, project schedule, and professional fees.

To help avoid disputes, add some standardization to the change process, and reinforce that changes to contracts should be made in writing. To assist with this, the Ontario Association of Architects (OAA) has developed-provided a standard “Agreed Change” formExtra Services or Contract Change” form for architectural services contractsthis purpose.

Background

HolderIt is important for CoP holders and clients must share a common understanding of the scope of services and the costs of the project they are working on. When differences of opinion occur, fee disputes may result. This is one of the reasons that it is prudent to keep clients aware of the reasons for changes, and the actual changes in the scope of services, and the status of project development.

Projects often start with a great deal of enthusiasm, and the holderCoP holder, other consultants, and the client rush to find possible solutions for the specific problems framed within the project. It is important at the outset of the project to take the time to, stop and record the expectations of all parties, identify the scope of services for the project, the client's budget, the project cost, and document the fees that will become due. In short, a contract must be negotiated, and the common understanding of the parties duly documented.

It is important to remember that it is often difficult to rationalize why additional services are required later in the project when there is no agreed scope of services at the start of the project. Agreements that are left ambiguous, or trusted to memory may be subject to differing opinions later in the project. Unrealistic or simply unmet expectations may lead to dissatisfactions and disputes. A written contract is essential to confirming and recording the common understanding. Standard-Use of standard contracts prepared by the professions are recommended.

It is prudent for the client and the holderCoP holder to refer to the contract terms from time to time during the project. This will help focus the parties and the work they do towards satisfying the specific requirements outlined in the contract. While working through the project requirements, refining the design, and the construction documentation, or even during the construction of the project, new requirements may have to be introduced into the contract. In isolation, such changes may or may not be significant in terms of the entire scope of services. Often, the cumulative effect of many such-small changes will have an impact on the project

cost, scope of services, schedule, or the professional fees. This incremental change in the scope of the project is often referred to as “scope creep”.

All agreed changes in the terms and conditions of the contract should be recorded in writing.

The scope of services, schedule or total project costs outlined in the contract may not anticipate the impact of “scope creep” on the contract. Additional services or work, which was not reasonably foreseeable, may be required to bring the project to a successful conclusion. Keep the client aware of such changes and the resultant change in scope, project cost, schedule and/or professional fees. When the cost of providing services increases, renegotiating the fees and or other terms and conditions of the contract is appropriate. A form, similar to a construction change order form, is one method that many ~~holders~~ have found to be useful in communicating changes in contractual requirements and obtaining client approval.

Effectively managing scope creep or other contractual changes at the project’s early stages is in the best interest of the client, the ~~holder~~ CoP holder, and the consultants to avoid disputes later in the project, and to contribute to constructive working relationships and a successful project.

Suggested Procedure

1. Define the scope of professional services, the project schedule, project cost, and the professional fees clearly in a written contract at the outset of the project, including how each party will address changes over the course of the project. It is good practice to use standard forms of contracts recommended by the OAA to confirm these and other important elements of the agreement. Consult a lawyer about appropriate wording and to evaluate changes proposed by others.
2. Brief all project team members within the practice and on the consultant team on the scope of services to be provided under the contract. Emphasize the importance of identifying any potential change in that scope of services, and of obtaining authorization before proceeding with any changes. Many ~~holder~~ CoP holders consider it good practice to distribute to the team copies of the description of the scope of services set out in the contract.
3. Establish milestones for Schematic Design, Design Development, and Construction Documents phases including formal approvals to proceed from the client. Prepare a detailed Project Brief that documents the scope. This is particularly important at the completion of Design Development (after which point the bulk of fees are expended). Track any scope changes during all phases by referring to the Project Brief and obtain client authorization.
4. When a change in scope of services is identified, inform the client in writing and include a detailed description of the change in services, impact on the project schedule, project cost, and on professional fees for which the CoP holder is responsible.
- 3-5. Negotiate with the client to arrive at an agreement on the extent of the change in services, schedule, project cost and professional fees that the client will authorize.
- 4-6. Before starting work on a change, obtain written authorization from the client. The A standardized agreed change form is used by many ~~holders~~ to confirm the change in services, schedule, project cost, and fees, and the client’s authorization to proceed. Maintain a record of the discussions and correspondence that lead to the change.
- 5-7. Upon receipt of the authorization to proceed, instruct-instruct the project team and consultants to proceed with the change. Instructions to the consultants should also be in writing and may also be issued as a contract change order.

References

OAA Standard Form for Extra Services and/or Contract Change Form Template

OAA Contracts and Guides

Mastering the Business of Architecture (MBA) Chapters 2A-2; 2A-6; 3A-3; 3A-4

Canadian Handbook of Practice (CHOP) 3rd Edition 2020 – Part 1 - Chapter 2.3 – Consultants, and Part 6 - Chapter 6.6 – Construction Contract Administration and Field Review

Attachments

~~1: Agree Change to Architectural Services Contract Template~~

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.

REDLINE

~~OAA Standard Form for Extra Services or Contract Change~~

Identification of Contract

Client: _____

Client Ref. No. _____

Architect: _____

Proj. No. _____

Project Name: _____

Contract: e.g. OAA 600-2021 A Dated: _____

Consistent with the ~~Contract~~ cited above, the following is an amendment to such ~~Contract~~ resultant from a change in the scope of services to be supplied, which amendment includes a description of any and all resultant adjustments in the ~~Contract Price~~ and ~~Contract Time~~ except as noted herein.

Description of Extra Services, Including Changes to Scope of Basic Services and Additional Services

Changes to the ~~Basic Services~~ and ~~Additional Services~~ provided under the ~~Contract~~ are as follows:

(Identify the item number from Schedule 2 or 3 to identify changes to such ~~Services~~ in the ~~Contract~~)

Item ~~Changes in Basic Services~~ in Schedule 2, including addition of ~~Extra Services~~ from Schedule 2

Item ~~Changes in Additional Service~~ in Schedule 3, including addition of ~~Extra Services~~ from Schedule 3

Description of ~~Extra Services~~ to be provided under the ~~Contract~~ are as follows:

(Include description of any ~~Services~~ not originally contemplated in the ~~Contract~~ and not identified in Schedules 2 or 3)

Where the change to the ~~Contract~~ described herein involves the removal of ~~Basic Services~~ or ~~Additional Services~~ under the ~~Contract~~, the ~~Contract Price~~ is hereby decreased by the sum of \$ exclusive of ~~Value Added Taxes~~.

Where any *Extra Services* described herein are to be provided at a fixed fee, the *Contract Price* is hereby increased by the sum of \$ _____ exclusive of *Value Added Taxes*.

Where any *Extra Services* described herein are not to be provided at a fixed fee, the additional cost for those *Extra Services* is capped at a maximum of \$ _____ exclusive of *Value Added Taxes*. Unless approved by separate change to the *Contract*, any fees incurred in respect of the *Extra Services* described herein beyond this maximum will be paid by the *Architect* without reimbursement by the *Client*.

Where the *Extra Services* described herein are to be provided on a time basis or at a unit rate, the rate shall be as per of the rates stipulated in [Article A18/Schedule 2] of the *Contract* or as otherwise agreed herein.

For the change to the *Contract* described herein, the *Contract Time* shall be increased/decreased by _____ *Working Days*.

Approval by Client

I certify that I am authorized to sign on behalf of the *Client* named in the *Contract* identified above.

Signature _____

Date _____

Printed Name _____

Position/Title _____

Signature _____

Date _____

Printed Name _____

Position/Title _____

Corporate Seal (Where applicable)

Approval by Architect

I certify that I am authorized to sign on behalf of the *Architect* named in the *Contract* identified above, as applicable

Signature

Date

Printed Name

Position/Title

Corporate Seal (Where applicable. This is not the seal issued by the OAA.)



~~OAA Standard Form for Extra Services or Contract Change~~

Identification of Contract

Client: _____

Client Ref. No. _____

Licensed Technologist OAA: _____

Proj. No. _____

Project Name: _____

Contract: e.g. OAA 600-2021 LT Dated: _____

Consistent with the ~~Contract~~ cited above, the following is an amendment to such ~~Contract~~ resultant from a change in the scope of services to be supplied, which amendment includes a description of any and all resultant adjustments in the ~~Contract Price~~ and ~~Contract Time~~ except as noted herein.

Description of Extra Services, including Changes to Scope of Basic Services and Additional Services

Changes to the ~~Basic Services~~ and ~~Additional Services~~ provided under the ~~Contract~~ are as follows:

(Identify the item number from Schedule 2 or 3 to identify changes to such ~~Services~~ in the ~~Contract~~.)

Item ~~_____~~ Changes in ~~Basic Services~~ in Schedule 2, including addition of ~~Extra Services~~ from Schedule 2

Item ~~_____~~ Changes in ~~Additional Service~~ in Schedule 3, including addition of ~~Extra Services~~ from Schedule 3

Description of ~~Extra Services~~ to be provided under the ~~Contract~~ are as follows:

(Include description of any ~~Services~~ not originally contemplated in the ~~Contract~~ and not identified in Schedules 2 or 3)

Where the change to the ~~Contract~~ described herein involves the removal of ~~Basic Services~~ or ~~Additional Services~~ under the ~~Contract~~, the ~~Contract Price~~ is hereby decreased by the sum of \$ _____ exclusive of ~~Value Added Taxes~~.

Where any ~~Extra Services~~ described herein are to be provided at a fixed fee, the ~~Contract Price~~ is hereby increased by the sum of \$ _____ exclusive of ~~Value Added Taxes~~.

Where any *Extra Services* described herein are not to be provided at a fixed fee, the additional cost for those *Extra Services* is capped at a maximum of \$ _____ exclusive of *Value Added Taxes*. Unless approved by separate change to the *Contract*, any fees incurred in respect of the *Extra Services* described herein beyond this maximum will be paid by the *Architect* without reimbursement by the *Client*.

Where the *Extra Services* described herein are to be provided on a time basis or at a unit rate, the rate shall be as per of the rates stipulated in [Article A18/Schedule 2] of the *Contract* or as otherwise agreed herein.

For the change to the *Contract* described herein, the *Contract Time* shall be increased/decreased by _____ *Working Days*.

Approval by Client

I certify that I am authorized to sign on behalf of the *Client* named in the *Contract* identified above.

Signature _____ Date _____

Printed Name _____ Position/Title _____

Signature _____ Date _____

Printed Name _____ Position/Title _____

Corporate Seal (Where applicable)

Approval by Licensed Technologist OAA

I certify that I am authorized to sign on behalf of the Licensed Technologist OAA named in the *Contract* identified above, as applicable.

Signature

Date

Printed Name

Position/Title

Corporate Seal (Where applicable. This is not the seal issued by the OAA.)



Consulting Contracts, Managing Changes, and Scope Creep

©2025, 2009 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

Changes are often made to contracts for architectural services and to subcontracts for consulting services. Changes to construction contracts are typically made in writing and follow a well-defined change notice and change order process. Changes to architectural and consulting services under the pressure of the project schedule are too often done verbally with the expectation that the change will be formalized later. This can lead to disputes about fees for extra services, particularly toward the end of a project, and when the notice provisions of the contracts are not adhered to.

Certificate of practice (CoP) holders should notify the client and other consultants at the earliest possible time when changes in a project are identified which may result in a change in the scope of services, a change to the project cost, project schedule, and/or a change in the professional fees.

CoP holders should not proceed with changes without written authorization from the client, which includes a detailed description of the agreed change in scope of services, project schedule, and professional fees.

To help avoid disputes, standardize the change process, and reinforce that changes to contracts should be made in writing. To assist with this, the Ontario Association of Architects (OAA) has provided a standard “Extra Services or Contract Change” form for architectural services contracts.

Background

It is important for CoP holders and clients to share a common understanding of the scope of services and the costs of the project they are working on. When differences of opinion occur, fee disputes may result. This is one of the reasons that it is prudent to keep clients aware of the reasons for changes, and the actual changes in the scope of services, and the status of project development.

Projects often start with a great deal of enthusiasm, and the CoP holder, other consultants, and the client rush to find possible solutions for the specific problems framed within the project. It is important at the outset of the project to take the time to, stop and record the expectations of all parties, identify the scope of services for the project, the client’s budget, the project cost, and document the fees that will become due. In short, a contract must be negotiated, and the common understanding of the parties duly documented.

It is important to remember that it is often difficult to rationalize why additional services are required later in the project when there is no agreed scope of services at the start of the project. Agreements that are left ambiguous, or trusted to memory may be subject to differing opinions later in the project. Unrealistic or simply unmet expectations may lead to dissatisfactions and disputes. A written contract is essential to confirming and recording the common understanding. Use of standard contracts prepared by the professions are recommended.

It is prudent for the client and the CoP holder to refer to the contract terms from time to time during the project. This will help focus the parties and the work they do towards satisfying the specific requirements outlined in the contract. While working through the project requirements, refining the design, and the construction documentation, or even during the construction of the project, new requirements may have to be introduced into the contract. In isolation, such changes may or may not be significant in terms of the entire scope of services. Often, the cumulative effect of many small changes will have an impact on the project cost, scope of services, schedule, or the professional fees. This incremental change in the scope of the project is often referred to as “scope creep”.

All agreed changes in the terms and conditions of the contract should be recorded in writing.

The scope of services, schedule or total project costs outlined in the contract may not anticipate the impact of “scope creep” on the contract. Additional services or work, which was not reasonably foreseeable, may be required to bring the project to a successful conclusion. Keep the client aware of such changes and the resultant change in scope, project cost, schedule and/or professional fees. When the cost of providing services increases, renegotiating the fees and or other terms and conditions of the contract is appropriate. A form, similar to a construction change order form, is one method that many have found to be useful in communicating changes in contractual requirements and obtaining client approval.

Effectively managing scope creep or other contractual changes at the project’s early stages is in the best interest of the client, the CoP holder, and the consultants to avoid disputes later in the project, and to contribute to constructive working relationships and a successful project.

Suggested Procedure

1. Define the scope of professional services, the project schedule, project cost, and the professional fees clearly in a written contract at the outset of the project, including how each party will address changes over the course of the project. It is good practice to use standard forms of contracts recommended by the OAA to confirm these and other important elements of the agreement. Consult a lawyer about appropriate wording and to evaluate changes proposed by others.
2. Brief all project team members within the practice and on the consultant team on the scope of services to be provided under the contract. Emphasize the importance of identifying any potential change in that scope of services, and of obtaining authorization before proceeding with any changes. Many CoP holders consider it good practice to distribute to the team copies of the description of the scope of services set out in the contract.
3. Establish milestones for Schematic Design, Design Development, and Construction Documents phases including formal approvals to proceed from the client. Prepare a detailed Project Brief that documents the scope. This is particularly important at the completion of Design Development (after which point the bulk of fees are expended). Track any scope changes during all phases by referring to the Project Brief and obtain client authorization.
4. When a change in scope of services is identified, inform the client in writing and include a detailed description of the change in services, impact on the project schedule, project cost, and on professional fees for which the CoP holder is responsible.
5. Negotiate with the client to arrive at an agreement on the extent of the change in services, schedule, project cost and professional fees that the client will authorize.
6. Before starting work on a change, obtain written authorization from the client. A standardized agreed change form is used by many to confirm the change in services, schedule, project cost, and fees, and the client’s authorization to proceed. Maintain a record of the discussions and correspondence that lead to the change.
7. Upon receipt of the authorization to proceed, instruct the project team and consultants to proceed with the change. Instructions to the consultants should also be in writing and may also be issued as a contract change order.

References

OAA Standard Extra Services or Contract Change Form Template

OAA Contracts and Guides

Mastering the Business of Architecture (MBA) Chapters 2A-2; 2A-6; 3A-3; 3A-4

Canadian Handbook of Practice (CHOP) 3rd Edition 2020 – Part 1 - Chapter 2.3 – Consultants, and Part 6 - Chapter 6.6 – Construction Contract Administration and Field Review

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.

DRAFT

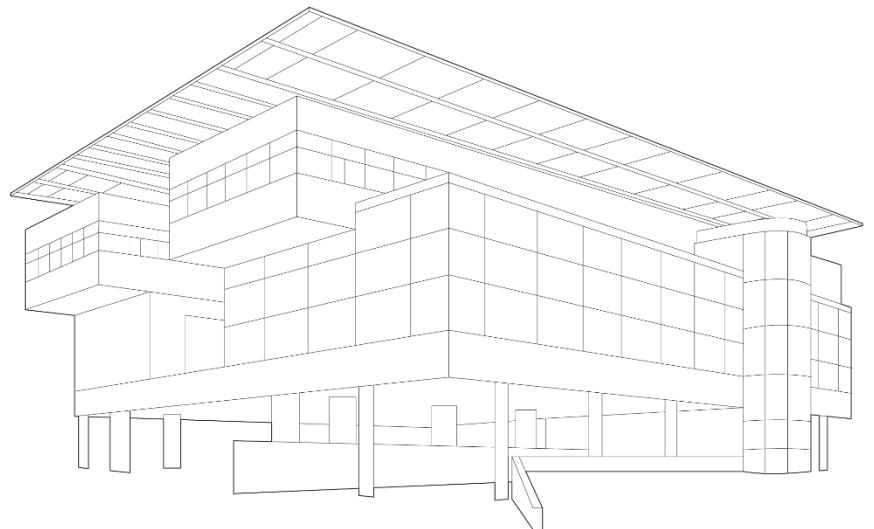
President's Log

Date	Event/Meeting	Location	Attendees
March 10	Virtual Keynote Rehearsal	Virtual meeting	w/E.Missio
March 18	Governance Committee	Virtual meeting	w/committee members
March 18	OAA Keynote Speaker	Virtual meeting	w/keynote speaker, members, staff
March 20	EABO meeting	Virtual meeting	w/EABO representatives, K.Doyle
March 28	President/Executive Director Meeting	Virtual meeting	w/K.Doyle
April 2	AGM Rehearsal	Virtual meeting	w/S.Vilardi, L.McKendrick, K.Doyle, E.Missio, T.Carfa
April 2	Meet re. Tariff & Trade Challenges	Virtual meeting	w/IO, Construction Sector stakeholders, K.Doyle
April 4	President/Executive Director Meeting	Virtual meeting	w/K.Doyle
April 8	OAA Annual General Meeting	Virtual meeting	w/Council, members, staff
April 11	President/Executive Director Meeting	Virtual meeting	w/K.Doyle
April 16	Society Chairs Meeting	Virtual meeting	w/Society Chairs, Council Liaisons, K.Doyle, M.Tokhy
April 22	ROAC pre-meeting	Virtual meeting	w/S.Vilardi, K.Doyle, C.Mills
April 23	Canada/UK Mutual Recognition Agreement Ceremony	Toronto	w/ROAC, International Mobility Cttee
April 25-27	ROAC Meeting	Montreal	w/ROAC representatives
April 29	Governance Committee	Virtual meeting	w/committee members
April 30	Executive Committee	Virtual meeting	w/Executive Committee
May 6	Society Chairs Meeting Prep	Virtual meeting	w/K.Doyle, C.Mykytshyn
May 12	Pre-Council meeting	Ottawa	w/Council
May 13	Council Meeting	Ottawa	w/Council, staff

Executive Director Report to Council

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.2

May 6, 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.

OAA Strategic Plan



Regulatory Leadership



Governance and Operations

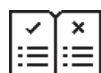


Member Competency



Public Education

OAA Committee work for 2025 is moving along well in accordance with the individual committee work plans which were shared with the Council in March. Staff Team Leads will be presenting individual service area semi-annual reports at the June Council meeting which will highlight progress and achievements towards the five-year Strategic Plan. As we have moved into year 4 of the Plan, added focus is being placed on the Act modernization project which was a key objective under the Regulatory Leadership pillar.



Regulatory Leadership

OAA Technology Program

Relaunch of the OAA Technology Program (OTP) began mid-January and implementation has gone smoothly. Refer to the Registrar's Report for additional details and statistics. OAA staff continue to work on updating a few outstanding communication pieces and documentation as well as references on the website that may have been missed in the original scan. The first administration of the Licensed Technologist exam is scheduled to take place on June 26 with a dozen Intern Technologists registered. Further outreach to the College Technology Programs is planned for later this year.

New Mutual Recognition Agreement (MRA) Signed with the UK

As reported in the last OAA News, the Regulatory Organizations of Architecture in Canada (ROAC), which includes the OAA, has signed an MRA with the United Kingdom's Architects Registration Board (ARB). The MRA is effective as of May 14, 2025, and the Architectural Institute of British Columbia (AIBC) will be coordinating licence applications for all ROAC jurisdictions.



National ExAC Working Group

The national ExAC Working Group continues to address specific recommendations stemming from the ExAC modernization review. Most recent activities included a recommendation to the ROAC Board of Directors to move forward with an RFQ to a shortlist of software vendors to identify a preferred vendor to update the existing software platform for item authoring, item banking and test generation. Following the selection process, the Working Group will report to the Fall 2025 ROAC Board Meeting with a recommendation for a new examination software platform, including detailed costing, required resources, and a schedule for implementation.

NCARB International Regulation Roundtable

The Spring 2025 International Regulation Roundtable hosted by the National Council of Architectural Registration Boards (NCARB) was held on April 24 and 25. I participated on behalf of the OAA. The two-day meeting was conducted over the course of the evening hours to accommodate time zones from around the world. NCARB began facilitating these roundtable discussions three years ago and are conducted on a semi-annual basis. OAA Registrar Mills and Deputy Registrar Hepburn have also participated in previous roundtables. While the agenda is generally structured the discussions are somewhat informal and fluid depending on the participants. The April session had a feature spotlight on the regulation of architecture in Malaysia. Other presentations centered on continuing education programs and model code development. The Roundtable provides an excellent opportunity for global networking and information sharing around professional regulation.

Regulatory Organizations of Architecture in Canada (ROAC)

President Wilson and Immediate Past President (IPP) Vilardi attended the Spring ROAC meetings in Montreal on April 26 along with the Registrar and I. Refer to the report from IPP Vilardi elsewhere in this agenda package. The Registrar and I also attended the semi-annual meeting of the ROAC Administrators. Operational and procedural items pertaining to the administration of the new MRA with the UK and the next administration of ExAC were reviewed among other items. Registration for the November sitting opens June 2.

A few key projects were of considerable focus since the last meeting of Council on the operational front as highlighted below:

OAA Headquarters Landscape Project

Work on the OAA's landscape project continues to move along with the design team and Architect Advisor Joe Lobko. Chief Operating Officer, Kathy Armbrust, and I continue to lead on the staff side in collaboration with the Building Committee. A detailed update on the project will be provided by the Building Committee and Lobko.

IT Infrastructure Project

I am pleased to report that the OAA Team officially transitioned to the Office 365 platform on April 14. This is a major milestone in the achievement of the OAA's

strategic priorities under the Governance pillar and have been effectively led by OAA Manager IT, Abhishek Chaudhary. Focused staff training has taken place since the implementation and will continue over the coming months. As previously reported, the new structure includes OAA Council, Committee and Society specific portals to allow for collaboration and modernization of access and sharing of materials with volunteer members. Council should expect to use the new portal for receipt of council packages and other materials by mid-June.

Annual General Meeting

The OAA's 135th Annual General Meeting of Members (AGM) was held virtually on Tuesday, April 8, 2025. The recording of the AGM is now available on the OAA Website.

Notice of Motion Hearing

As a reminder, the OAA reached out to those formerly known as Licensed Technologists OAA and past participants of the OAA Technology Program in September 2024 to make them aware of a draft Notice of Motion (NOM). This NOM came from the legal counsel of the Association of Architectural Technologists of Ontario (AATO) and alleges the OAA is in contempt of the May 10, 2023, Court Order. The hearing of AATO's motion was held on April 10, 2025. Represented by legal counsel, the OAA vigorously opposed the motion. The Judge's decision is pending.

Pro-Demnity Annual Meeting – April 27

OAA Council participated virtually in the Annual Meeting of the Shareholder of Pro-Demnity Insurance Company on April 27.



Infrastructure Ontario (IO) Release of Supplementary Conditions

After 18 months of discussion, IO has confirmed that the government has approved a final set of supplementary conditions for use with OAA Document 600, 2021 in relation to IO projects, predominately on the real estate side. Since receiving this information, our industry group has been reviewing this final set of SC's against our comments submitted as well as results of the meeting that occurred last August with IO.

At this point, we are still waiting to hear from IO as to when these will officially be 'in use'. OAA/ACEC-ON/ARIDO are likely to prepare a common statement to our respective members on the release of the new contract/SC's very shortly. In addition, we are reviewing the final set of SC's to determine if there is more detailed communication required in terms of the implications of the contract, related to risk and liability. We are also working with Pro-Demnity on this file.



Public Awareness

OAA Architectural Societies

The annual in-person meeting of the Chairs of the 14 local Societies and Councillor liaisons will take place on May 13, 2025, in conjunction with the OAA Conference in Ottawa. The meeting will include a workshop component offering an opportunity to build on past successes and lay the groundwork for future initiatives. More specifically the purpose of this discussion is to explore the role of Societies in Reshaping Communities – a direct tie to this year's Conference Theme; foster dialogue among Society Chairs operating at various scales; and develop a scalable framework or "recipe" to guide Societies in meaningful community impact.

The President, Councillor liaisons and I look forward to meeting with the local Societies once again this year. The schedule is almost complete and will be shared in OAA News shortly.

Construction & Design Alliance Ontario (CDAO)

A meeting with the Forum was held on March 24. The procurement guide project is moving along well, which is the major focus of the CDAO this year.

Engineers, Architects & Building Officials (EABO)

The President and I attended a meeting of EABO on March 20. The Building Officials expressed appreciation for the OAA's work on updating the Code Data Matrices in concert with the introduction of the new Code. The OAA welcomes feedback from the group in regard to the Matrices with a view to continual improvement. A separate meeting to explore additional training opportunities for our respective memberships will be arranged shortly.

Industry discussion with Infrastructure Ontario (IO)

OAA President Wilson and I participated in a virtual discussion on April 2 at the invitation of IO along with others from the design & construction industry. The purpose of the meeting was to share thoughts and impacts of the current trade and tariff environment, both from a practical as well as a regulatory perspective. This served as another opportunity for the OAA to add regulatory perspective to the issue with a major client group.



Office of the Registrar Statistical Report

FOR THE PERIOD FEBRUARY 19 TO APRIL 25, 2025

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.3

PRESENTED BY

Christie Mills



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 and limited 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 or limited licence.

As per Section 13(3)b and 13.1(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 or limited 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 or limited 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 or limited licence in matters related to [Exemption Requests to Council](#) as set out in Section 33 of the regulations.

- No assessment interviews were held during the reporting period.

The committee undertook its annual orientation training February 26, 2025, led by legal counsel Paul Davis of Paliare Roland. The orientation focused on administrative law training, covering topics such as legal frameworks, impartiality, confidentiality, procedural fairness, and related issues. Davis also discussed the composition of the ERC, its statutory authority, and the content of the experience requirements. The

session concluded with a discussion on the broader legal principles that inform the procedures employed by the ERC.

Following the orientation, the Chair led discussions centered around the assessment process for architectural experience, including the review and potential revision of assessment questions, scoring methods, and passing thresholds.

Work undertaken by the committee within this reporting period includes:

- incorporation of the December 2024 committee recommendations for the assessment questions, scoring, and documents.
- inclusion of standard deviation data within assessment matrix.
- tightening up of procedures to ensure regulatory alignment.
- commitment to consideration of the [Canadian Standard of Competency for Architects](#) within the assessment process.
- ongoing analysis of the passing threshold for assessments; and
- commitment to review assessment questions for currency, deficiencies or gaps.

The committee will be meeting again in late May to continue its review of assessment procedures.

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, Licensed Technologist, 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).

Below are the Complaints Committee statistics for the reporting period:

Total Inquiries ¹	22
Total Complaints	8
Held in abeyance	1
Preliminary Review Stage	0
Closed	
Not referred (dismissed)	1
Not referred (withdrawn)	1
Not referred (caution)	1

¹ 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.

Referred to Discipline	1
Registrar's Investigations ²	1
Good Character Investigation	1

The 4-hour annual orientation training for the Complaints Committee on March 7, 2025, was led by OAA Deputy Registrar Claire Hepburn. The session covered the legal and regulatory framework of the committee, the complaint-handling process, key administrative law concepts, and implicit bias training, providing a comprehensive foundation for committee members. Participants engaged in hypothetical scenarios to apply these concepts, fostering discussions and clarifications.

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 the reporting period:

- One hearing is scheduled for May 6, 2025.
- There are eight (8) matters to be scheduled in 2025.

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.

The committee undertook its annual orientation training March 7, 2025, led by legal counsel Jean-Claude Killey of Paliare Roland. The orientation focused on the committee's legal framework and authority and highlighted the committee's crucial role in maintaining professional standards. Killey emphasized that administrative decision-makers like the Discipline Committee have statutory powers that must be exercised consistently with the law's purpose and are subject to court review. He also discussed the appeals process for discipline committee decisions, the importance of procedural fairness, and the hearing process, distinguishing between contested and uncontested hearings.

Registration Committee

When the Registrar proposes to refuse (Notice of Proposal (NoP)) an application for licence, limited licence, certificate of practice or temporary licence; proposes to

² Not yet referred to complaints

suspend or revoke a certificate of practice or temporary licence; or, proposes to issue a licence, limited 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, limited 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 Registration Committee statistics for the reporting period are as follows:

- Twenty-five (25) hearings are to be scheduled.

The committee undertook its annual orientation training February 27, 2025, led by legal counsel Jean-Claude Killey of Paliare Roland. The orientation focused on administrative law principles, the legal framework governing the OAA and the Registration Committee, and the committee's role in assessing architectural qualifications and making decisions. Key topics included procedural fairness, decision-making processes, and the importance of impartiality and independence in the committee's work. Killey also spoke of the need to be aware of relevant legal standards, interpret them, and make findings of fact. Killey emphasized that the committee, as the decision-maker, controls its own process and stressed the importance of exercising discretion in a manner consistent with the purpose of the statute.

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” or “Licensed Technologist”. It is also an offence to hold oneself out as

engaging in the practice of architecture without a licence or limited licence issued by the OAA.

Misrepresentation of a protected title 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 acting 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 the reporting period:

New matters received for reporting period	19
Active files/ Ongoing investigations	15
Resolved by Legal Counsel	0
Resolved by OOTR for reporting period	1
Unable to locate	0
No breach found	3
Injunctions (ongoing)	0
Injunctions (resolved)	0

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).

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 submitted its 2024 RICF report to the OFC for the March 10, 2025 deadline and awaits feedback.

FARPACTA Recent Amendments

Changes to the *Fair Access to Regulated Professions and Compulsory Trades Act* (FAPACTA) create legal obligations for professional regulators in Ontario. The most recent amendments include the following:

Legal Obligations	In-Effect Date
Third party accountability: These provisions specify the reasonable measures that a regulated profession must take to ensure that its third-party service provider (TPSP) makes its assessments in a way that is transparent, objective, impartial and fair, including a requirement for the regulator to enter into an agreement with its TPSP to address certain prescribed matters.	Jan 1, 2026
Alternative documentation: These provisions require that each regulator have an alternative documentation policy and submit it for review and approval by the Fairness Commissioner (FC).	Policy due to FC Jan 1, 2026
Parallel processing plan: These provisions require that each regulator develop a parallel processing plan and submit it for review and approval by the Fairness Commissioner.	Policy due to FC Jan 1, 2026
Registration time standard: These provisions require that each regulator communicate its registration decisions to internationally trained individuals within three months of receiving complete applications, in at least 90% of all cases.	July 1, 2025

Third Party Service Providers

Regulated professions that use third-party organizations to assess qualifications must ensure that these assessments are conducted impartially, transparently, fairly, and objectively. To do this, they must enter into formal agreements with third-party assessors, outlining key responsibilities and processes. These agreements should specify assessment criteria, minimum passing scores, the frequency of assessments (wherever feasible, applicants will have access to exams and other types of assessments at least three times in a calendar year), and timelines for completing each step. Assessors must also have the

necessary expertise, and decisions must be communicated in writing within 10 business days, including reasons for negative outcomes and details on competency gaps. Additionally, third parties must have a fair and independent appeal process, notifying applicants within 15 business days whether their appeal will proceed and providing relevant timelines.

Regulated professions are responsible for ensuring applicants receive clear and accurate information about the third-party assessment process, including timelines, assessment criteria, acceptable alternatives for required documentation, fees, and appeal procedures. They must also establish a complaints process for applicants experiencing issues with third-party assessors and make all relevant information easily accessible online. This ensures that applicants understand their rights and the steps involved in the assessment process, promoting fairness and transparency in professional licensing.

For OAA purposes it is reasonable to expect the OFC will consider the CACB and CExAC to be third party service providers to the OAA. To assist regulators with their requirement to enter into agreements with their TPSPs who assess qualifications, the OFC proposes to develop two flexible templates with section headings and sample wording for key clauses pertaining to agreements with

- a. educational credential assessment organizations, and
- b. national assessment or examination bodies.

Alternative Documentation Policy

A regulated profession must have a policy outlining acceptable alternatives to required documentation when applicants cannot obtain it for reasons beyond their control. The policy must define what constitutes a reasonable alternative, specify processing timelines, and meet any regulatory requirements.

The alternative documentation plan must be submitted to the Fairness Commissioner for review and updated if circumstances change. Before implementation, the profession must respond to any input from the Fairness Commissioner and, if required by regulations, obtain approval or make necessary changes as directed.

Parallel Processing Plan

The parallel processing expectations require that regulators in Ontario develop a plan addressing how it will enable multiple registration processes to take place concurrently - especially where applicants experience delays. Examples identified to date include:

- permitting applicants to enter the assessment and registration process at any stage, and in any order, that they wish;
- allowing for provisional registration where regulators create alternative registration classes to provide applicants with opportunities to work in their field while completing outstanding requirements for full registration; and
- concurrent completion of work experience and final coursework or examinations.

A regulated profession must submit its parallel processing plan to the Fairness Commissioner for review. If there are any changes that may impact the plan, it must be updated and resubmitted. Before implementing a new or revised plan, the profession must respond to any input from the Fairness Commissioner and, if required by regulations, obtain approval or make any necessary changes as directed.

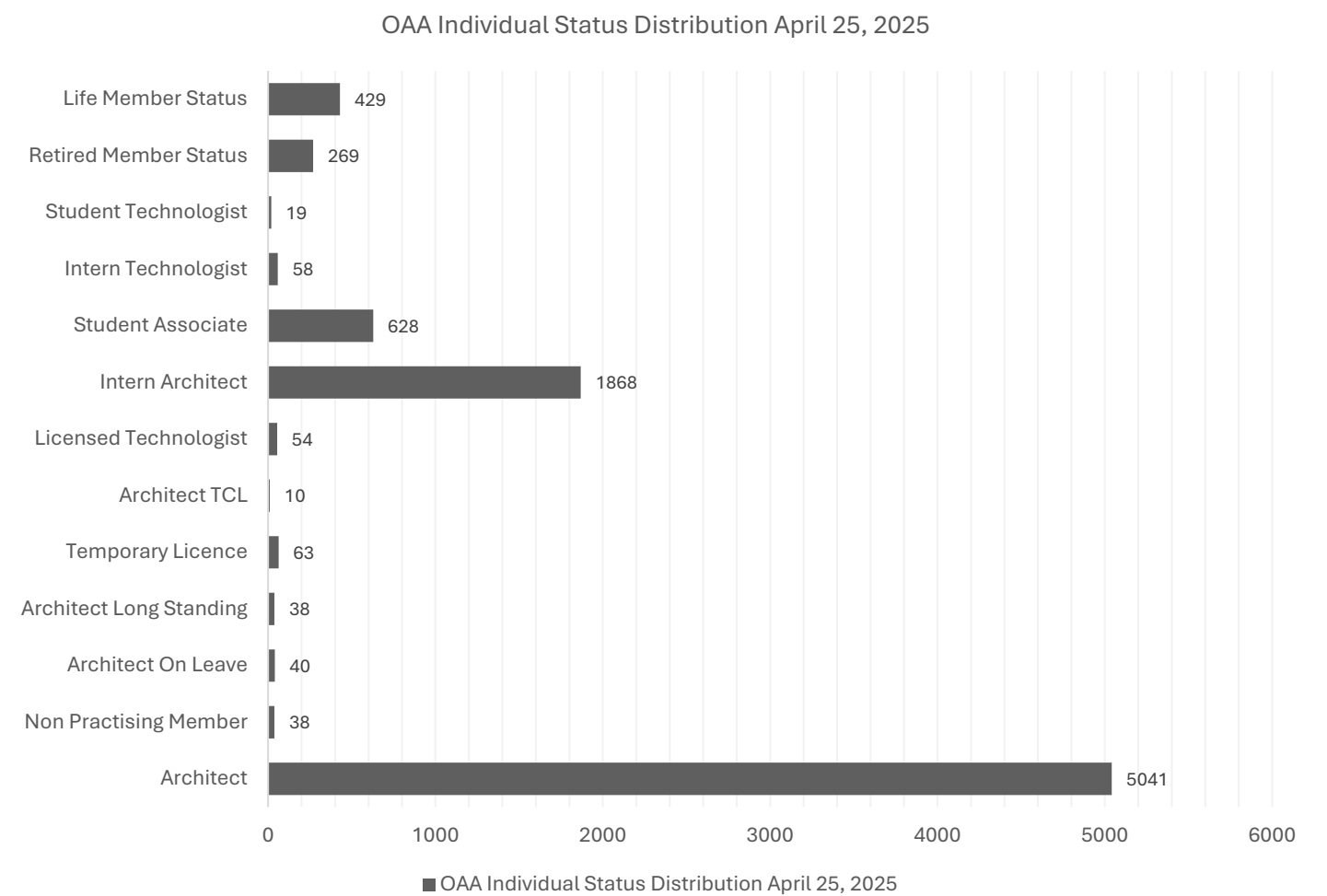
Following the April 3, 2025, consultation from the Fairness Commissioner to the regulators in Ontario, the OFC committed to providing templates for regulators to use in their development of the above noted policy and plan.

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.

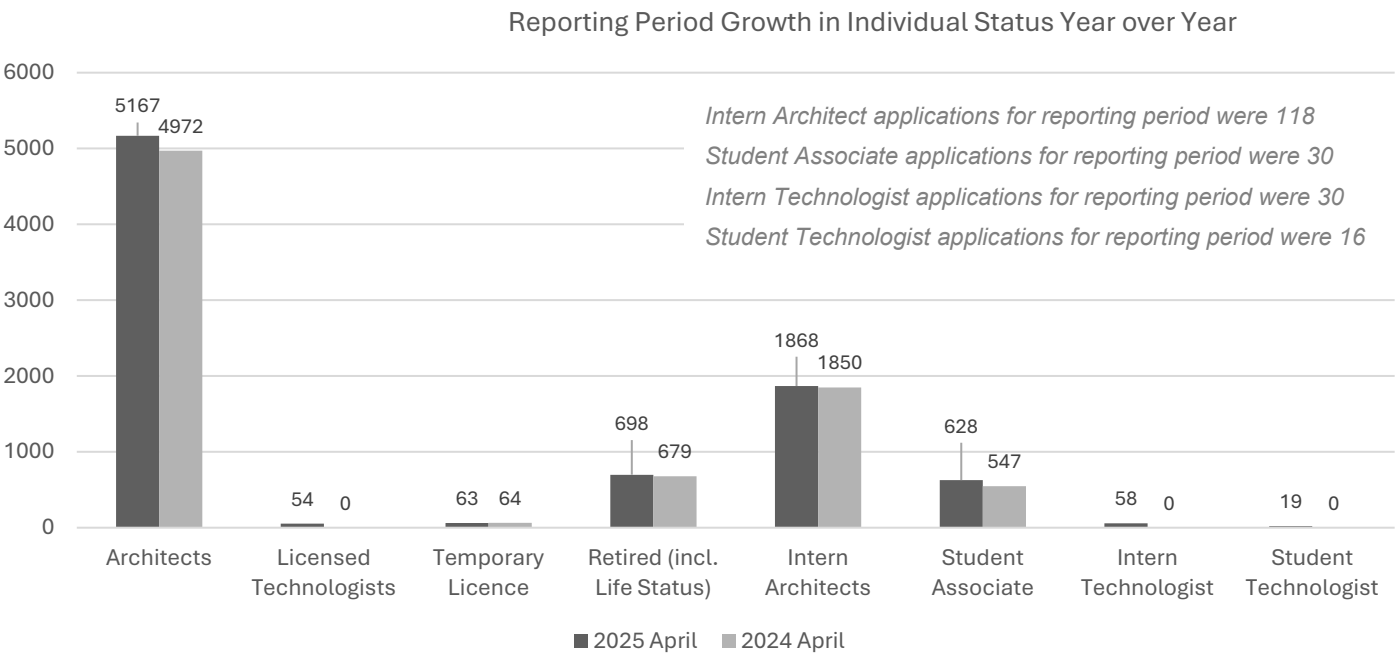
Office of the Registrar Statistics

Below are the OAA community statistics for the reporting period, 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.

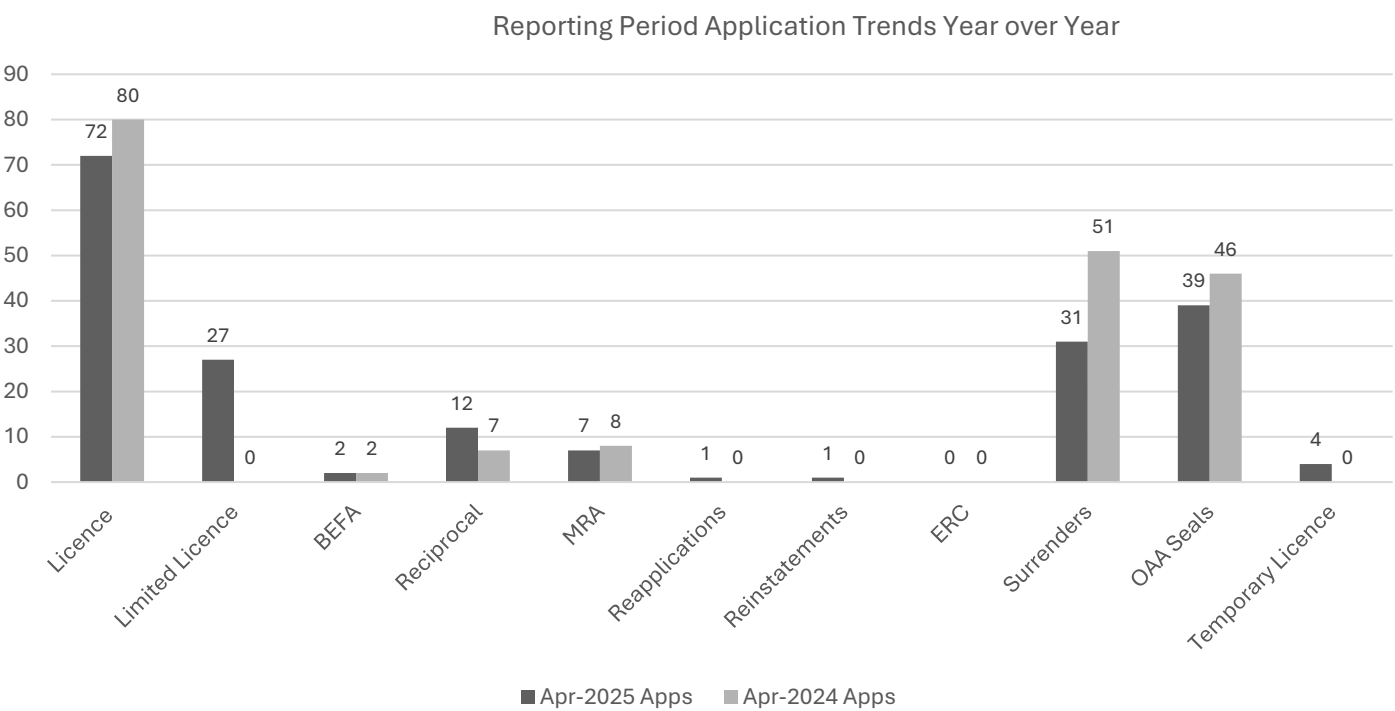
OAA Members and Status Holders



Growth in Individual Status



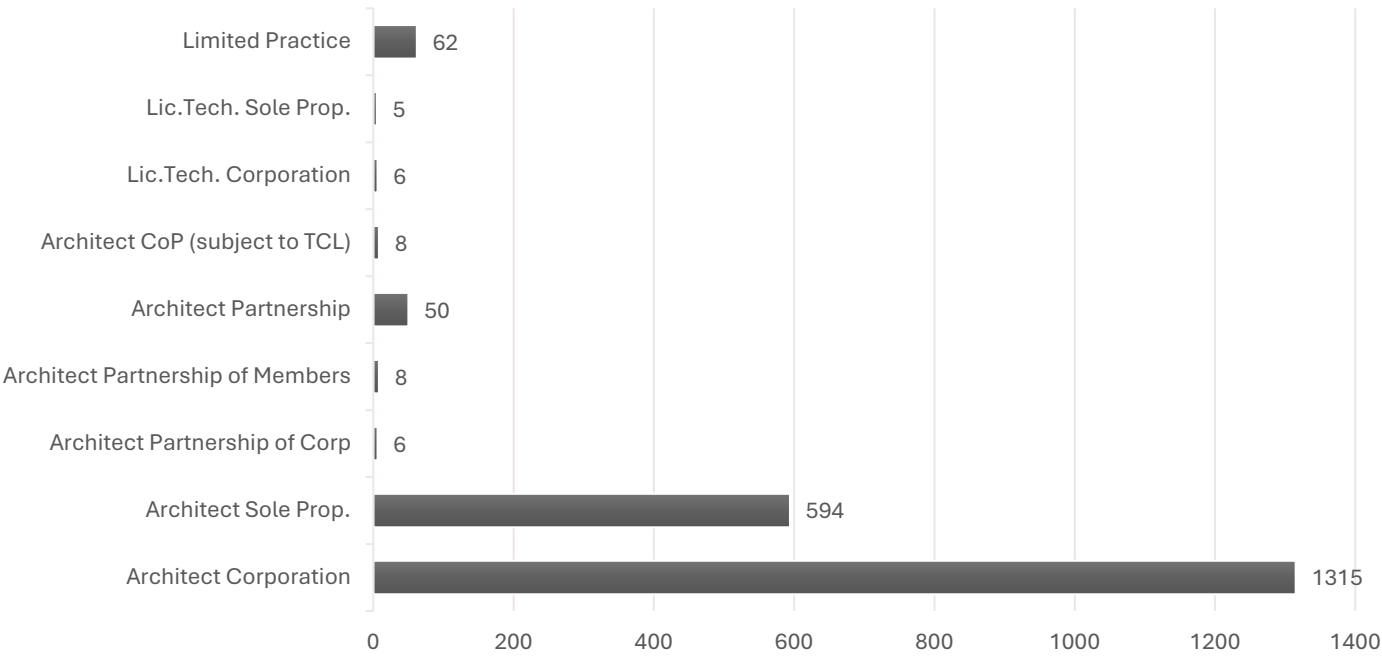
Licence and Limited Licence Applications



- Total licence and limited licence applications received for reporting period was 81.
- Total licence and limited licene applications approved for reporting period was 126.
- Of the 72 first time licence applicants, 31 were internationally educated applicants.

Certificate of Practice

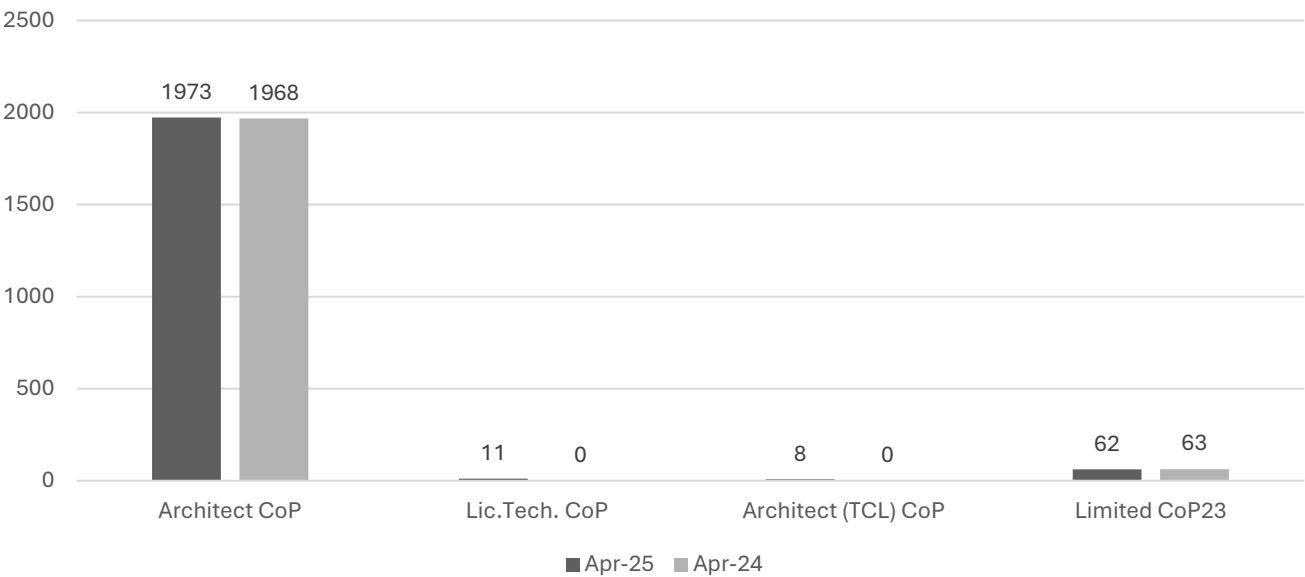
OAA Certificate of Practice Distribution as of April 25, 2025



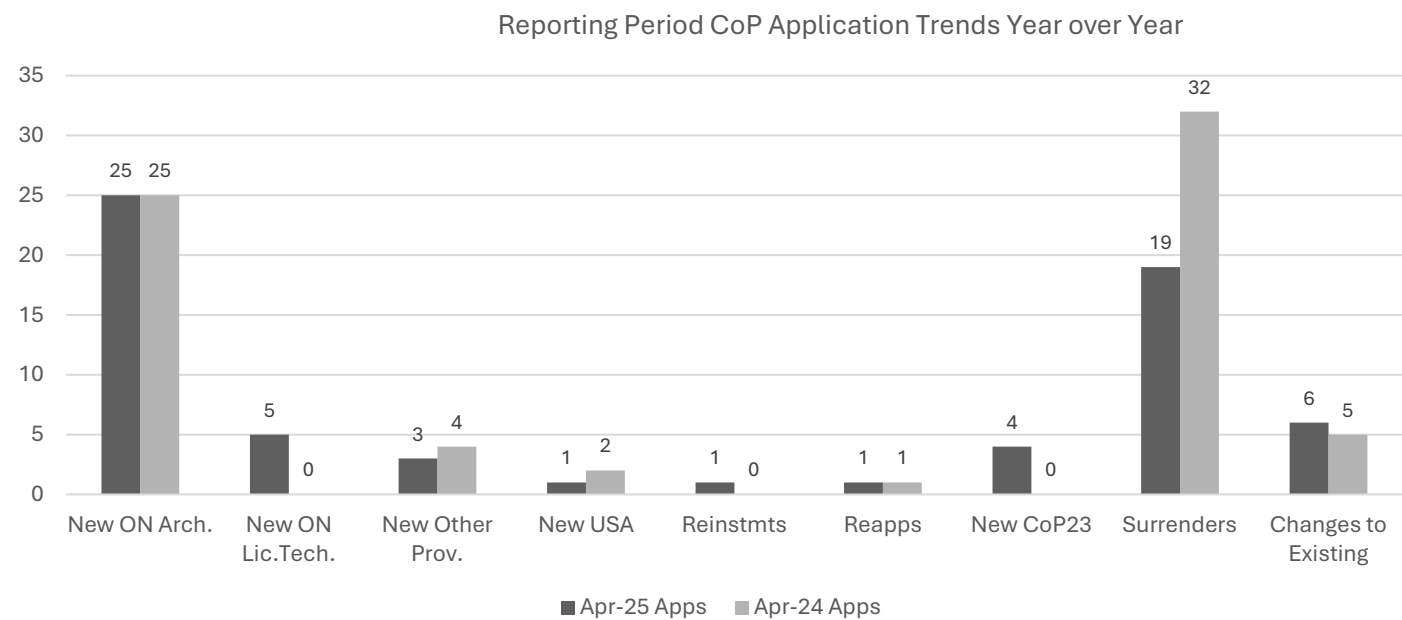
* TCL refers to “subject to terms, conditions, and limitations”

Growth in Practices

Reporting Period Growth in Practices Year over Year



Certificate of Practice Applications



- Total certificate of practice applications received for reporting period was 40.
- Total certificate of practice applications approved for reporting period was 46.

Long Term Trends



Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING

May 13, 2025

(open)

ITEM: 6.4.a

From: Lara McKendrick, Senior Vice President and Treasurer

Date: May 2, 2025

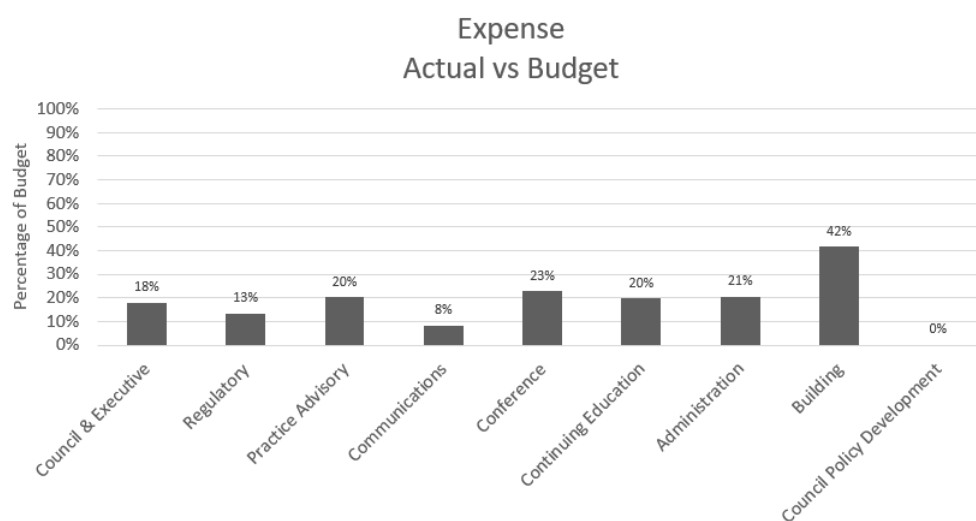
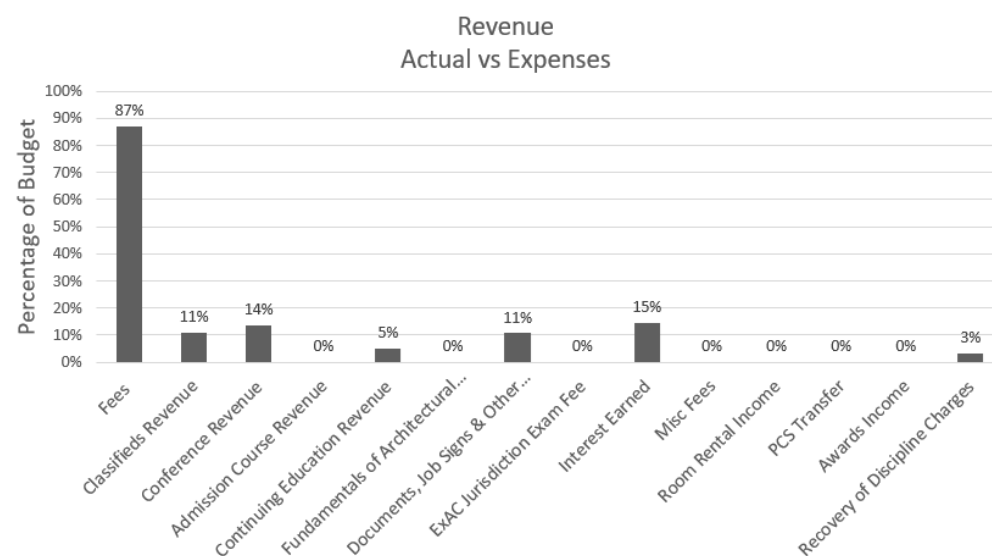
Subject: Unaudited Financial Statements for the Three Months Ended February 28, 2024

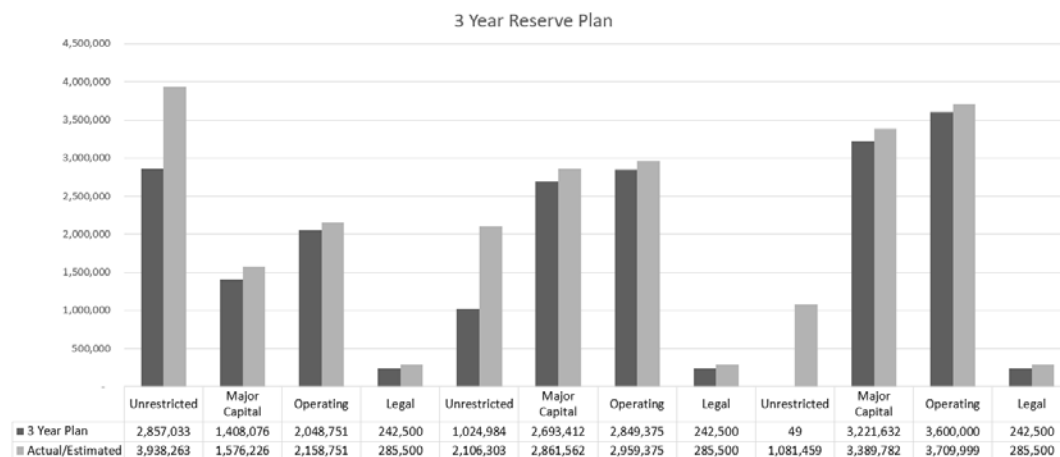
Objective: To provide Council with financial statements and related information regarding Quarter 1 of FY-2025

As appendices, this memo includes the following financial statements for your information:

1. Balance Sheet;
2. Statement of Cash Flows;
3. Statement of Revenue and Expenses (comparing 2025 expenditures to 2024, and showing 2025 approved budget figures by category);
4. Contingency Approved vs Spent (tracking approved expenditures to be charged to Council Policy Development Contingency and available balance for the year);
5. Committee Statement expenses (shows 2025 committee budget versus actual spending) with format updated to current committee structure; and
6. Statement of Members' Equity (current restricted and unrestricted reserve amounts).

Financial Snapshot – Year-to-date Overview





Policy Contingency

The total 2025 allocation for the Council's Policy Contingency is **\$136,791**.

As of February 28, 2025, Council has not yet approved any new initiatives to be drawn from the Policy Contingency this year.

Therefore, the remaining amount in Policy Contingency is **\$136,791**.

Additional Items of Note

As of February 28, 2025, here are additional items of which Council should be aware.

Reserves

As per the Three-Year Reserve Plan, the 2025 allocation of **\$1,285,336** to the Major Capital Reserve Fund and **\$800,624** to the Operating Reserve Fund has been transferred and is reflected on the Balance Sheet and Reserves.

Revenue

Fees received to date are **\$6,669,675**. This figure represents 85% of the budgeted annual fees revenue.

Expenses

The Building Committee expense line reflects an increase of \$47,085, primarily due to consulting fees associated with the Landscape Project. This expense is in alignment with the approved 3-Year Reserve Fund Plan, and a portion will be offset by transfers from the Capital Reserve Fund. The first of these transfers was completed during the second quarter, as planned.

Additionally, the Maintenance & Security line shows an increase of \$33,122. This includes \$8,000 in elevator maintenance work and \$20,000 in costs related to the closure of the OAA's offsite storage account. These items were accounted for in the budget, with the storage materials having now been successfully relocated onsite.

These investments are part of ongoing efforts to maintain and enhance the Association's facilities in accordance with long-term planning and budget commitments.

Conference 2024

At this time, Conference registration revenue is tracking below expectations, with \$366,000 received to date compared to the budgeted \$514,463. Despite this shortfall, staff have been diligent in aligning expenses with budgeted amounts while maintaining a quality experience for attendees. Efforts are focused on ensuring that any cost adjustments do not negatively affect the overall value of the Conference and member experience. Per usual it is anticipated that there will be a slight increase in registration in the week leading up to Conference.

In addition to the revenue shortfall, hotel room pickups within the OAA room block at the Westin Ottawa have been lower than contracted. This may result in an attrition cost of up to \$75,000. OAA Conference Team staff has been in communication with the Westin, and the hotel has indicated a willingness to discuss this matter further once the Conference concludes. It is worth noting that the room block agreement was signed in spring 2022 under the assumption that attendance levels would return to pre-2020 norms. Room blocks secured for 2026 have since been adjusted to better reflect current trends in room pickup.

While we do anticipate that there will be a deficit in regard to the 2025 Conference budget, depending on the year end financial position, this may not negatively affect the general operating budget.

Action

None. For information only.

Attachments

Financial statements for three months ended February 28, 2025

ONTARIO ASSOCIATION OF ARCHITECTS
Balance Sheet

Three Months Ended February 28, 2025

	2025		2024	
ASSETS				
CURRENT				
Petty Cash	500		500	
Cash-CIBC	1,099,137		1,447,873	
Cash-Premier Investment Account (PIA)	5,590,215	6,689,852	13,503	1,461,876
Term Deposits - General	7,000,000	7,000,000	11,438,717	11,438,717
Accounts Receivable	-403,071		-221,682	
Long Term Member Accounts Receivable	7,769		7,769	
NSF Cheques	2,040		2,040	
Accrued Interest	-16,345		153,808	
HST - Input Tax Credits	-30,698		25,935	
HST Receivable	6,299	(433,915)	44,004	11,966
Prepaid Expenses	307,479		45,000	
Prepaid Miscellaneous	150		150	
Inventory	9,944	317,573	11,108	56,258
Total Current	8,846,016	13,573,510		12,968,818
LONG TERM				
Land	470,000		470,000	
Furniture & Equipment	584,078		579,667	
Computer Equipment	1,581,400		1,660,010	
Website Development	515,415		523,165	
Building - 111 Moatfield Drive	10,939,466		10,939,466	
Building Additions	2,638,325		2,667,042	
Total Property & Equipment		16,728,684		16,839,350
Accumulated Depreciation - Furniture & Equipment	-332,701		-333,916	
Accumulated Depreciation - Computer	-921,814		-909,079	
Accumulated Depreciation - Website Development	-439,749		-451,666	
Accumulated Depreciation - Building	-2,429,252		-2,429,191	
Accumulated Depreciation - Building Additions	-1,670,153		-1,659,040	
Total Accumulated Depreciation		(5,793,669)		(5,782,891)
Net Fixed Assets		10,935,015		11,056,458
Investment in Pro-Demnity	48,137,966	48,137,966	48,137,966	48,137,966
Total Assets		72,646,491		72,163,242
LIABILITIES				
CURRENT				
Accounts Payable	268,215		0	
Refund Clearing	3,814		4,175	
CExAC Payable	374,859		1,560,164	
CExAC Operating Fund	119,988		-1,106,699	
RBC-LTD Clearing	-2,193		-2,545	
Stale Dated Refund	214		214	
HST Payable	267,980		120,350	
		1,032,878		575,658
Deferred Revenue - Fees	580,653		575,779	
Deferred Revenue - ConEd	15,716		16,117	
	0	596,369		591,896
Mortgage Payable - Current	145,373	145,373	129,220	129,220
Total Current		1,774,620		1,296,774
LONG TERM				
Mortgage Payable - Long Term	3,908,900		3,908,900	
Total Long Term Liabilities		3,908,900		3,908,900
Total Liabilities		5,683,520		5,205,674
EQUITY				
Members' Equity	56,551,156		56,830,696	
Major Capital Reserve Fund (Internally Restricted)	2,863,412		2,583,872	
Operating Reserve Fund (Internally Restricted)	2,158,751		2,158,751	
Legal Reserve Fund (Internally Restricted)	285,500		285,500	
Surplus/(Deficit)	5,104,153		5,092,748	
Members Equity Closing		66,962,972		66,951,567
Total Liabilities & Equity		72,646,491		72,157,242

ONTARIO ASSOCIATION OF ARCHITECTS

Statement of Cash Flows

Three Months Ended February 28, 2025

Operating Activities:

Excess (deficiency) of revenue over expenses	5,104,153
--	-----------

Add items not involving cash:

Amortization of property and equipment	(5,540,059)
--	-------------

Loss on Disposal of property and equipment	
--	--

Income from investment in Pro-Demnity Insurance Company	55,846,966
---	------------

Net change in non-cash working capital items:

Accounts receivable	1,663,154
---------------------	-----------

Inventories	14,694
-------------	--------

Prepaid expenses	215,912
------------------	---------

Accounts payable and accrued liabilities	(1,288,152)
--	-------------

Deferred revenue	(885,888)
------------------	-----------

Major Capital Reserve Fund (Internally Restricted)	(290,890)
--	-----------

Operating Reserve Fund (Internally Restricted)	(1,358,127)
--	-------------

Legal Reserve Fund (Internally Restricted)	(285,500)
--	-----------

Cash flows from operating activities	53,196,262
---	-------------------

Financing Activities:

Mortgage Payable - Current	(242,287)
----------------------------	-----------

Cash flows from financing activities	(242,287)
---	------------------

Investing activities:

Short-term deposits	4,438,717
---------------------	-----------

Purchase of property and equipment	16,589,154
------------------------------------	------------

Cash flows from investing activities	21,027,871
---	-------------------

Net increase/(decrease) in cash during the year	73,981,847
--	-------------------

Cash, beginning of year	(68,161,310)
-------------------------	--------------

Cash, end of period	5,820,536
----------------------------	------------------

Statement of Revenue and Expenses
Three Months Ended February 28, 2025

	2024			2025			2025			BUDGET VARIANCE	
	Detail	Total	%	Detail	Total	%	Detail	Total	%	Detail	Total
REVENUE											
Fees	6,229,977	96.8%	6,669,675	97.4%	7,879,844.48	83.3%	7,879,844.48	83.3%	0		
Classifieds Revenue	4,000	0.1%	2,825	0.0%	25,500.00	0.3%	25,500.00	0.3%	0		
Conference Revenue	111,500	1.7%	111,255	1.6%	814,462.50	8.6%	814,462.50	8.6%	0		
Continuing Education:											
Admission Course Revenue	0	0.0%	0	0.0%	10,000.00	0.1%	10,000.00	0.1%	0		
Continuing Education Revenue	48,353	0.8%	7,134	0.1%	136,500.00	1.4%	136,500.00	1.4%	0		
Fundamentals of Architectural Practice	0		0	0.0%	9,000.00	0.1%	9,000.00	0.1%	0		
Documents, Job Signs & Other Revenue	5,247	0.1%	5,583	0.1%	52,000.00	0.5%	52,000.00	0.5%	0		
ExAC Jurisdiction Exam Fee	0	0.0%	0	0.0%	128,242.80	1.4%	128,242.80	1.4%	0		
Interest Earned	26,820	0.4%	53,247	0.8%	367,104.93	3.9%	367,104.93	3.9%	0		
Misc Fees	0	0.0%	0	0.0%	0.00	0.0%	0.00	0.0%	0		
Room Rental Income	0		0	0.0%	10,000.00	0.1%	10,000.00	0.1%	0		
Pro-Demrity:	0		0		0.00		0.00		0		
PCS Transfer	0	0.0%	0	0.0%	3,500.00	0.0%	3,500.00	0.0%	0		
Awards Income	8,600		10	0.0%	0.00	0.0%	0.00	0.0%	0		
Recovery of Discipline Charges	1,500	0.0%	750	0.0%	24,000.00	0.3%	24,000.00	0.3%	0		
Total Revenue	6,435,997	100.0%	6,850,480	100.0%	9,460,155	100.0%	9,460,155	100.0%	0		
EXPENDITURES											
Council & Executive	295,700	16.0%	225,589	12.9%	1,252,171	13.2%	1,252,171	13.2%	0		
Attendance-Selected Conference	0		0		10,000.00		10,000.00		0		
AGM (Annual General Meeting)	0		0		0.00		0.00		0		
Committees & Task Groups:											
Governance and HR Committee	0		550		35,000.00		35,000.00		0		
Finance and Audit Committee	0		0		0.00		0.00		0		
Construction Design Alliance Ontario (CDAO)	0		0		7,000.00		7,000.00		0		
Joint OAA/Arido Task Group	0		0		0.00		0.00		0		
Miscellaneous Committee Expense	0		1,088		4,000.00		4,000.00		0		
OAA/OGCA Best Practices Committee	43		0		0.00		0.00		0		
Policy Advisory Coordination Team (PACT)	16		371		37,640.00		37,640.00		0		
Council & Executive	62,910		41,810		301,847.40		301,847.40		0		
Legal:	0		0		0.00		0.00		0		
Legal General	9,454		13,007		25,000.00		25,000.00		0		
Liaison With Gov't & Other Organizations	0		0		2,000.00		2,000.00		0		
National:	0		0		0.00		0.00		0		
Canadian Architectural Certification Board (CACB)	32,812		30,413		70,700.00		70,700.00		0		
ROAC Meetings	800		-4,602		94,833.60		94,833.60		0		
International Relations Committee	0		0		0.00		0.00		0		
RAIC Conference	0		0		12,950.00		12,950.00		0		
Tri-National Agreement	0		0		0.00		0.00		0		
OAAAS	0		0		0.00		0.00		0		
Integration Committee OAA Technology Program	0		0		0.00		0.00		0		
Salaries & Benefits Council & Exec	188,650		142,951		651,199.51		651,199.51		0		
Regulatory:	235,050	12.7%	228,340	13.1%	1,820,107	19.2%	1,820,107	19.2%	0		
Committees:											
Complaints Committee	0		3,424		86,716.63		86,716.63		0		
Discipline Committee	0		0		52,450.00		52,450.00		0		
Experience Requirements	0		541		44,760.67		44,760.67		0		
Fees Mediation Committee	0		0		0.00		0.00		0		
Registration Committee	0		0		120,400.00		120,400.00		0		
The Interns' Committee	0		0		0.00		0.00		0		
Exam for Architects in Canada (ExAC):	22,828		0		0.00		0.00		0		
ExAC Exam Administration	0		670		156,150.00		156,150.00		0		
Legal:	0		0		0.00		0.00		0		
Legal -Reg Amendments (Names)	6,057		0		50,000.00		50,000.00		0		
Act Enforcement	0		4,731		60,000.00		60,000.00		0		
Appeals	145		700		20,000.00		20,000.00		0		
Discipline Hearings	0		1,694		60,000.00		60,000.00		0		
Fees Mediation	2,920		0		0.00		0.00		0		
General	0		-4,202		30,000.00		30,000.00		0		
Registration Hearings	203,099		430		120,000.00		120,000.00		0		
Salaries & Benefits - Registrar	0		220,351		1,019,629.84		1,019,629.84		0		
Practice Advisory:	145,383	7.9%	174,007	10.0%	856,576	9.1%	856,576	9.0%	0		
Legal-Practice	15,260		0		49,500.00		49,500.00		0		
Committees:											
Engineers, Architects, Building Officials (EABO)	0		0		0.00		0.00		0		
Practice Resource Committee	0		0		19,955.30		19,955.30		0		
Salaries & Benefits - PA	130,123		174,007		787,121.02		787,121.02		0		
Communications:	166,121	9.0%	89,001	5.1%	1,125,129	11.9%	1,125,129	11.9%	446,204		
Committees:											
Communications and Public Education Committee	0		2		13,455.00		13,455.00		0		
Internal Public Outreach Program	0		0		30,700.00		30,700.00		0		
Content Creation/Publications	2,415		7,293		17,000.00		17,000.00		0		
Cyber Security Insurance	7,745		7,745		9,292.50		9,292.50		7,708		
French Translation Costs	0		0		10,000.00		10,000.00		-708		
Honors & Awards	0		7,710		67,753.00		67,753.00		-57,753		
Public Outreach & Education	0		3,000		0.00		0.00		67,753		
Architectural Awareness Funds	57,582		3,750		87,000.00		87,000.00		-29,000		
Scholarships and Awards (Trust Fund)	0		0		58,000.00		58,000.00		-58,000		
Societies:											
Society Liaison Travel	0		833		10,000.00		10,000.00		55,000		
Society Funding	0		0		65,000.00		65,000.00		86,000		
Special Program Funding	0		0		151,000.00		151,000.00		-134,830		
Society Chairs Meeting - Conference	0		0		16,169.78		16,169.78		-16,170		
Tradeshows and Ongoing Outreach Activities	0		17		0.00		0.00		25,000		
University Funding	0		0		25,000.00		25,000.00		13,555		
Web Maintenance/Hosting	10,329		10,875		38,554.67		38,554.67		487,650		
Salaries & Benefits - Communications	88,049		47,778		526,204.17		526,204.17		0		
Conference:	369,938	20.1%	239,836	13.7%	1,053,350	11.1%	1,053,350	11.1%	0		
Conference	324,966		123,927		834,827.16		834,827.16		0		
Salaries & Benefits - Conference	44,973		115,909		218,523.33		218,523.33		0		
Continuing Education:	79,644	4.3%	90,861	5.2%	460,675	4.9%	460,675	4.9%	0		
Continuing Education Advisory Committee	0		0		0.00		0.00		0		
Continuing Education:	0										
Admission Course	0		1,350		27,000.00		27,000.00		0		
Continuing Education	1,800		7,525		35,000.00		35,000.00		0		
Fundamentals of Architectural Practice	0		0		25,000.00		25,000.00		0		
Salaries & Benefits - ConEd	77,844		81,987		373,674.89		373,674.89		0		
Practice Consultation Service:	20,960	1.1%	0	0.0%	0	0.0%	0	0.0%	0		
Salaries & Benefits - PCS	20,959.89		0		0.00		0.00		0		
Administration:	246,200	13.4%	301,656	17.3%	1,462,189	15.5%	1,475,689	15.6%	-13,500		
HR Administration	5,104		9,911		91,065.21		91,065.21		0		
Audit Fees	-13,740		-340		46,100.00		46,100.00		0		
Bank Charges:	0		0		0.00		0.00		0		
Bank Charges	893		655		3,000.00		3,000.00		0		
Fees Processing Charges (Formerly Credit Card)	-2,106		-1,741		15,000.00		15,000.00		0		
Visa Service Charges	0		0		500.00		500.00		0		
Computer Operations	32,496		29,302		270,999.00		284,499.00		-13,500		
Documents, Job Signs & Other	2,996		2,697		22,000.00		22,000.00		0		
General Expenses	560		69		8,000.00		8,000.00		0		
Insurance:	0		0		0.00		0.00		0		
AD&D	0		615		1,358.70		1,358.70		0		
Errors & Omissions	10,000		11,442		13,854.75		13,854.75		0		
Directors & Officers	37,020		37,020		38,433.15		38,433.15		0		
Mailing Costs:	0		0		0.00		0.00		0		
Postage & Delivery	3,202		4,682		21,300.40		21,300.40		0		
Member Mailings	0		0		4,792.59		4,792.59		0		
Printing & Office Supplies	3,004		8,249		23,430.44		23,430.44		0		
Subscriptions & Memberships	6,629		1								

Statement of Revenue and Expenses
Three Months Ended February 28, 2025

	2024			2025										
	ACTUAL-YTD			ACTUAL-YTD			ANNUAL BUDGET			BUDGET PROJECTION			BUDGET VARIANCE	
	Detail	Total	%	Detail	Total	%	Detail	Total	%	Detail	Total	%	Detail	Total
Firewall Legal Opinion	0			0			0.00			0.00			0	
Initiative to Address EDI – Consultant/Survey Consultant	0			0			0.00			0.00			0	
Total Energy Use Intensity Calculator (TEUI)	0			0			0.00			0.00			0	
UoIT - Future of LTC	0			0			0.00			0.00			0	
Consultant re Scope of Practice of the Licensed Technologist OAA	0			0			0.00			0.00			0	
Presidents Wall	0			0			0.00			0.00			0	
Sponsorship Request - Sustainable Community	0			0			0.00			0.00			0	
Sponsorship Request - Winter Stations	0			0			0.00			0.00			0	
Altus Group - economic impact of architecture	0			0			0.00			0.00			0	
Third Honourable Mention - Landscape Award				0			0.00			0.00			0	
Landscape Client Representative				0			0.00			0.00			0	
TEUI/OpenBuilding.ca				0			0.00			0.00			0	
Depreciation		182,271	9.9%	0	211,986	12.1%		847,943	9.0%		847,943	9.0%	0	0
Computer	0			80,433			321,727.90			321,727.90			0	
Building	67,697			68,373			273,486.64			273,486.64			0	
Building Additions	68,312			44,373			177,497.87			177,497.87			0	
Furniture & Equipment	33,260			11,787			47,151.44			47,151.44			0	
Web	13,001			7,020			28,078.67			28,078.67			0	
Reserves		0	0.0%		0	0.0%				0.00				
Legal Reserve										0				
Major Capital										0				
Operating Reserve										0				
Expenditures before Extraordinary & YE Items		1,843,984			1,746,327			9,460,155			9,473,655			432,704
Surplus(+) / Deficit(-) Before Extraordinary & YE Items		4,592,013			5,104,153			-1			-13,500			-432,704
Extraordinary & Year End Items		0	0.0%		0	0.0%		0	0.0%		0	0.0%		0
AATO Court Order Costs														
Total Expenditures		1,843,984			1,746,327			9,460,155			9,473,655			432,704
TOTAL REVENUE		6,435,997			6,850,480			9,460,155			9,460,155			0
TOTAL EXPENDITURES		1,843,984	100.0%		1,746,327	100.0%		9,460,155	100.0%		9,473,655	100.0%		432,704
SURPLUS(+) / DEFICIT(-)		4,592,013			5,104,153			0			-13,500			-432,704

			2024					
		BALANCE	APPROVED	ACTUAL-YTD			ANNUAL BUDGET	
				Detail	Total	%	Detail	Total
Council Policy Development:		136,791	0		0			136,791
Council Policy Development Contingency					0		136,791	
1			0	0				
2			0	0				
3			0	0				
4			0	0				
5			0	0				
6			0	0				
7			0	0				

ONTARIO ASSOCIATION OF ARCHITECTS
Committee Statement
Three Months Ended February 28, 2025

	2025		
	BUDGET	BUD PROJECTION	ACTUAL
Standing Committees	106,050	106,050	921
Governance and HR Committee	35,000	35,000	550
Finance and Audit Committee	0	0	0
Communications & Public Education Committee (CPEC)	13,455	13,455	0
Practice Resource Committee (PRC)	19,955	19,955	0
Policy Advisory Coordination Team (PACT)	37,640	37,640	371
Statutory Committees	606,175	606,175	45,775
Council and Executive Committee	301,847	301,847	41,810
Discipline Committee	52,450	52,450	0
Complaints Committee	86,717	86,717	3,424
Experience Requirements Committee	44,761	44,761	541
Registration Committee	120,400	120,400	0
Fees Mediation Committee	0	0	0
Practice Review Committee (Mandate Fulfilled by PRC see above)	n/a	n/a	n/a
Discretionary Committees	147,000	147,000	61,757
Building Committee	147,000	147,000	61,757
Interns Committee	0	0	0
Operational (Staff-led) Committees	0	0	0
Continuing Education Advisory Committee	0	0	0
	859,225	859,225	108,454

ONTARIO ASSOCIATION OF ARCHITECTS
Statement of Members Equity
Three Months Ended February 28, 2025

Members Equity Year to Date (YTD)

Total Members Equity	
Less: Current YTD Surplus from P&L	
Less: Allocated Reserves (Restricted)	
Legal Reserve	
Major Capital Reserve	
Operating Reserve	
Less: Pro-Demnity Insurance	
Less: Property & Equipment	
YTD Unrestricted Members Equity Available for Allocation	
Remaining Unrestricted Members Equity 2025 YE	

Detail	Total
	66,962,972
	5,104,153
	5,307,663
285,500	
2,863,412	
2,158,751	
	48,137,966
	6,880,742
	1,532,448
	1,532,448

Any Surplus or Deficit at Year End is transferred to the Members Equity. Council determines at Year End the portion of Unrestricted Members Equity to be allocated to the restricted reserves.
The Finance & Audit Committee provides recommended amounts to transfer to Restricted Reserves during the budgeting process in the fall.

Major Capital Reserve Fund

Budget 2020 provides for a portion of the projected surplus to be allocated to this reserve.

History:

In 2014 the Building Reserve Policy was formalized and issued "to provide a source of sustained funding for Capital Maintenance and Repair as well as Capital Improvements that cannot be otherwise funded in a single budget year through the OAA's existing annual operating budget for repair and maintenance of the building."
In 2012 for Budget 2013 Council approved an increase to the Building Reserve of \$50,000 bringing the annual contribution to \$170,000.

For Budget 2011 Council approved an increase to the annual contribution to the building reserve from \$40,000 to \$120,000
Council on October 12, 2006 approved the creation of a reserve fund to provide for future repairs to the building. Budget 2007 represented \$40,000 in order to establish the reserve.

Operating Reserve

Budget 2020 provides for a portion of the projected surplus to be allocated to this reserve.

History:

In 2014 the Operating Reserve Policy was issued to "ensure the stability of the mission, programs, employment, and ongoing operations of the organization in the event of a sudden or unexpected negative change in revenue that would affect the provision of services to members."

Legal Reserve

Budget 2020 provides for a portion of the projected surplus to be allocated to this reserve.

History:

The legal reserve fund was established in 2017 to set aside funds for years during which unusually high legal costs arise as was the case in 2017.

Memorandum

To: Council

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

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.5.a

From: Communications and Public Education Committee (CPEC)

Susan Spiegel, Chair	
Mariella Amodio	Pearl Chan
Kurtis Chen	Jon Hobbs
Carl Knipfel	Elaine Mintz
Brigitte Ng	

Date: April 28, 2025**Subject:** General Updates and Funding Allocations**Objective:** To provide an update on CPEC initiatives since the March Council meeting.

The Communications & Public Education Committee (CPEC) provides oversight and advice for consideration by Council and OAA staff on public education and outreach activities in direct response to the secondary objects of the Association as set out in the *Architects Act*:

To establish and maintain or to assist in the establishment and maintenance of classes, schools, exhibitions, or lectures in, and to promote public appreciation of, architecture and the allied arts and sciences.

More specifically, the Committee focuses its efforts to advance the public's understanding and recognition that architecture is integral to the quality of life and well-being of society as experienced through a sustainable, resilient, and durable built environment.

The Committee met in person at the OAA Headquarters on April 11. After hearing a few key updates from staff, the Committee spent the bulk of the meeting focused on evaluating submissions for the OAA Public Awareness Funding program.

Keynote

The [2025 Keynote](#) presentation with internationally acclaimed urban planner Larry Beasley aired live via Zoom Webinar on Tuesday March 18. Despite some technical difficulties at the outset, the presentation carried on and was very well-received with OAA audiences; feedback gathered via online survey immediately following the event indicated **over 91% of viewers rated the presentation as “good” or “excellent”**. The survey also revealed that the majority of viewers (almost 58%) were considering attending or confirmed to be attending Conference in 2025.

The keynote was made available for a limited four-week period on the OAA’s YouTube Channel for viewership by OAA members and the general public.

Building Headquarters Videos

The Committee discussed the merits of expanding the five headquarters videos featuring key experts involved in the OAA’s *Renew + Refresh* renovation to include overlaid clickable links to additional video content. The Committee agreed that the videos are a success in their current format and will be released in early May to promote the upcoming Doors Open Toronto event at the headquarters. Before committing to further investment, the Committee requested more information about the scope of work and accompanying cost and that a communications plan be provided. This will be revisited in future meetings.

OAA Funding Program

Twice each year, the OAA offers **Public Awareness Funding** to applicants working to expand awareness of the value of architecture in their communities. To learn more about the program, visit oaa.on.ca/connect/sponsorship-advertising/public-awareness-funding.

March 2025 marked the first round of Public Awareness Funding submissions after strategic revisions were made to improve transparency and clarity for applicants, as well as to streamline the application and evaluation process for applicants, OAA staff, and committee members alike. These revisions were accepted by the Committee in spring 2024 with the intention to action them in the new funding year (2025). By all accounts, the revisions have improved administration and review of the applications.

Out of a **record 24 submissions**, the Committee determined the following eight projects were most deserving of funding this round:

- Architectural Conservancy of Ontario – *Doors Open 2025* = **\$3300**
- Car Martin – *To the Loo! Toronto Toilet Design Challenge - Public Event and Exhibition* = **\$3895**
- Heritage Ottawa – *2025 Heritage Ottawa Walking Tours* = **\$3300**
- Kelvin Kung - *Designing Dignity: Community-Driven Insights for Better Palliative and Long-Term Care Spaces* = **\$5000**
- Laurentian University – *Archi-North Summer Camp* = **\$7500**
- Moses Structural Engineering – *Timber Fever* = **\$3000**



- RAW Design - *Architectural and Design Summer Camp "Diversity in Design"* = **\$8000**
- Urban Minds – *1UP Fellowship 2025-2026* = **\$6000**
- **TOTAL: \$39,995** (of a possible \$40,000 available this round)

Upon review, the Committee also observed that there is currently no clear mechanism to receive and consider deserving applications aimed at expanding **member competency** in addition to public awareness and education.

The Committee explored a few hypothetical options to address this gap. While some projects could partner with willing and able Local Societies to mutually apply for Special Project Funding, this approach would further strain an already stretched funding pool. Another possible approach might be to direct select projects to the Continuing Education team, however this may weed out innovative learning formats that do not conform to the Zoom webinar platform, nor is this approach suitable for projects requiring more substantial funding in order to be realized.

It is the Committee's recommendation that Council consider the merits of introducing a pathway for deserving applicants to gain support for member competency-focused projects through a dedicated funding pool as part of its next 5-Year Strategic Plan.

OAA Website

OAA Staff presented a revised design to the OAA homepage based on recommendations received from the Committee at its February meeting. These revisions are in progress and will be implemented upon final confirmation from the website developers, Enginess, at no additional cost.

PACT x CPEC Big Think

Members of the OAA's Policy Advisory Coordination Team (PACT) invited CPEC members for a Big Think discussion about the 2024 Altus report that highlights the economic impact of the architecture industry in Ontario. The Big Think will identify strategic ways to amplify the findings of this report. Since the first iteration in 2018, the findings of this report have been a powerful tool in meetings with elected officials and now there is a desire to expand awareness amongst the general public about the impact of the architecture industry. Among the key findings of the 2024 report, is that the architecture industry (which includes design and construction) is responsible for 17% Ontario's GDP. The meeting is set for July 7, 2025. See the included PACT memo for further details.

Action

The report is provided for information; however Council is asked to bring forward the recommendation of CPEC that it consider the merits of introducing a pathway for deserving applicants to gain support for member competency-focused projects through a dedicated funding pool as part of its next 5-Year Strategic Plan.

If in agreement this can be tracked accordingly by staff and brought forward at the appropriate time.

Attachments

None.

Memorandum

To: Council

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

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.5.b

From: Governance and HR Committee

Lara McKendrick, Chair, SVP & Treasurer	Ted Wilson, President
Settimo Vilardi, IPP	Susan Spiegel, Vice President
Elaine Mintz, LGIC	Michelle Longlade, LGIC

Date: April 30, 2025**Subject:** Update from OAA Governance & HR Committee**Objective:** To provide Council with an update regarding recent activities of the Governance & HR Committee.

The Governance Committee met on April 29, 2025. This memo summarizes the priority items discussed at the meeting.

OAA Society Finances and Governance

Societies are a valuable part of the OAA culture. The Committee has been collecting and reviewing financial information related to the OAA societies to better understand their activities and financial status individually and collectively. This understanding and ongoing discussion with the societies will help inform the Committee's recommendations to Council regarding the state of, and potential changes to Society finances and governance.

Member and Practice Survey

A comprehensive survey of both Members and Practices is set to be conducted in 2025. An RFP has been sent to potential survey consultants for their response. [Previous versions of these surveys](#) were conducted in 1996, 2011, and 2019. The next step will be

to use a Quality-Based Selection process to select a Survey Consultant and put together a working group to review the survey questions.

OAA Operational Risk Registry

All organisations face risks and opportunities. Risk management is a multifaceted and ongoing process. The approach to risk management monitoring, assessment of risk, and risk mitigation strategies was reviewed. The committee notes that the registry has been in place and reviewed by the auditors for many years. OAA management has proper monitoring and mitigation strategies in place. The registry will also be reviewed by the F&A committee for the appropriate F&A oversight items.

Policy Review

In accordance with the Committee's mandate to provide good governance oversight, which includes the OAA Council Policies, a request was reviewed by the Committee to consider an amendment to the Financial Hardship Policy. The request specifically related to the number of times an individual can avail themselves of the Policy within a 10-year period. The Committee reviewed the policy as well as statistics regarding the aggregate total use of the Financial Hardship Policy over a number of years. Based on this, the Committee determined that the existing Policy is fair and recommended that no change be made to the Policy.

Workforce Planning and HR Updates

The Committee received an update from COO Kathy Armbrust regarding internal staff changes in keeping with the goals and objectives of the Operational Review and the 5-year Strategic Plan. Workforce planning efforts recognize current staff and allow for growth within the staff team. Knowledge retention and succession planning are key aspects of these ongoing efforts.

Act Modernization

The Committee received an update from the Registrar and Executive Director regarding the work plan for the Act Modernization project, including the Act audit and gap analysis that has been conducted as an important first step in this project. Regular updates will be provided to Council on an ongoing basis. At specific milestones, Council review and input will be requested.

Action

None. For information only.

Attachments

Financial Hardship Policy



Council Policy

Policy Name	Financial Hardship Policy Application for Relief from Payment of OAA Fees due to Financial Hardship
Issue Date	March 18, 2003
Revision Dates	February 13, 2025 July 12, 2022 January 27, 2022 September 20, 2018 June 5, 2013 October 1, 2010 October 30, 2009 December 31, 2007

Council has adopted a Policy that OAA fees may be waived or reduced for up to one year by the Executive Director for reasons of financial hardship. The Policy will be reviewed on an annual basis. Requests for relief of a fine incurred due to non-compliance within a Continuing Education Cycle or costs related to Disciplinary Action will not be considered under this Policy.

Waived or reduced fees or fees payable by installments are available to any class of persons required to pay a fee to the Association to maintain their status.

The policy permits fees to be waived or reduced/deferred according to the following criteria:

1. Fees for Architects, Non-Practising Architects and Licensed Technologists that may be waived, reduced or paid by installments under the Financial Hardship Policy:
 - Annual Licence Fee
 - Retroactive Fees for an individual reapplying for licensure within three years of surrendering their licence
 - Annual Certificate of Practice Fee for a Sole Proprietor or for a Corporation where there is a sole shareholder (n/a for Non-Practising Architect)
2. Fees for Intern Architects and Intern Technologists that may be waived or reduced or paid by installments under the Financial Hardship Policy:
 - Annual Intern Architect or Intern Technologist Fee
 - OAA Admission Course Fee may be waived in full, or payment may be deferred from the time of registration until no less than two weeks prior to the start of the Admission Course, or may be paid in equal monthly installments over the period from the start of the registration period to the start of the Admission Course;
 - Late Submission Charges
3. Fees for Retired members may be waived/reduced/deferred under the financial hardship policy:
 - Annual Retired member Fee

All individuals must submit their request, in writing, including the following information:

- i. Identify the fee(s) to be waived, reduced, deferred, paid in installments or a combination of the options;
- ii. The reason for the financial hardship; and
- iii. The estimated time required until full payment of fees may resume, maximum one year period.

The terms of the Financial Hardship Policy are as follows:

1. The individual making the request must be in good standing with the Association.
2. Each application will be reviewed and a decision made to waive or reduce fees or allow payment by instalment as applicable, on a case-by-case basis by the Executive Director.
3. Each individual whose fees are waived, reduced or deferred under the *Financial Hardship Policy* may be required to submit documentation to support the application. Such documentation may include copies of income tax filings by the individual and members of the immediate family. The Executive Director may refer to low income cut offs and low income measures from Statistics Canada in making their decision.
4. Architects, Non-Practising Architects and Licensed Technologists must comply with Continuing Education Program requirements during the period that fees are waived under this policy, unless otherwise agreed by the Executive Director.
5. Intern Architects must comply with requirements under the Internship in Architecture Program during the period that fees are waived under this policy. When granted relief under this policy, Intern Architects should note that time will continue to accumulate towards the five-year period after which the Intern will be subject to the same fee as licensed Architects.
6. Intern Technologists must comply with requirements under the OAA Technology Program during the period that fees are waived under this policy.
7. A request for a waiver or reduction of annual fees must be made between the time of receipt of the annual invoice fee and the end of February of the calendar year to which the fee applies or at the time of re-application for membership, or Intern status.
8. Where the financial hardship period is less than one year, or the one-year financial hardship period ends at some point during the calendar year, the full membership fee for the remainder of the year will be prorated in quarterly increments.
9. Where an individual has already paid fees to the Association and during the period of time that they have suffered a financial hardship, a refund of fees already paid will not be considered.
10. Where an individual has been granted a leave of absence from the profession due to medical or other compassionate grounds, and at the same time is unable to pay the reduced annual membership fee charged under that policy, that reduced annual fee may also be waived where an application is made to do so under this Financial Hardship Policy. All other terms under the Leave Policy would still apply.
11. Re-application by the same individual will be considered on a case-by-case basis. Individuals may receive relief under this policy a maximum of three times within a ten-year period.

Where the Architect, Non-Practising Architect, Licensed Technologist, Intern Architect, Intern Technologist, or Retired Member has been granted a waived or reduced fee, the following should be communicated to the individual in writing:



1. Where an Architect, Non-Practising Architect or Licensed Technologist chooses to surrender their licence during their financial hardship period, the policy *Continuing Education Requirements for New Members, Re-application, Re-instated Members and Members Under Suspension* would apply upon re-application.
2. Where an Intern Architect or Intern Technologist allows their status to lapse during the period of financial hardship, the policy for *Experience Submission Requirements and Retroactive Entry Charges* for any experience recorded during that period would apply on re-application for Intern Architect or Intern Technologist status.

Questions regarding this policy should be directed to OAA Executive Assistant, Executive Services, Tina Carfa at tinac@oaa.on.ca.



Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.5.c

From: Building Committee

Lara McKendrick, Chair, SVP & Treasurer
Thomas Yeung, Vice President
Sheena Sharp, Member-at-Large

Date: April 29, 2025**Subject:** Update from OAA Building Committee**Objective:** To provide Council with an update on the activities of the Building Committee

The last Building Committee meeting was held on April 28, 2025.

Landscape Project

The Committee received an update on the status of the Landscape Project from the OAA Team, which includes Building Committee Chair, Lara McKendrick, and Client Advisor, Joe Lobko, along with COO, Kathy Armbrust, and Executive Director, Kristi Doyle. At this point, work continues on refinement of the design and pricing as well as the schedule.

OAA Presidents Wall

The new President's Wall has been installed at the entry level of the OAA Headquarters. The Committee has received very positive feedback. The Building Committee is planning a ribbon-cutting ceremony and lunch on June 19, 2025, to officially celebrate the Wall and acknowledge the work of the Past Presidents. Past presidents will be invited to the ceremony and lunch. As a participant in Doors Open Toronto, hundreds are expected to view the new wall over the third weekend in May when the OAA opens its doors to visitors.

Action

None. For information only.

Attachments

None

Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.5.d

From: Thomas Yeung, Vice President & PRC Chair

Date: May 2, 2025

Subject: Practice Resource Committee (PRC) - Update.

Objective: To update Council on Practice Resource Committee (PRC) activities.

Activities Report – Practice Resource Committee (PRC)

Practice Resource Committee had its second meeting of 2025 on Thursday, May 1. The meeting was conducted in-person and focused on the following key items:

General Updates:

Members were briefed on the March Council meeting as well as reminded of the upcoming OAA Conference in May 2025.

Staff provided a brief update on contract negotiations for the renewal of the [CSA Access Program](#) for the 2025-2026 period, including messaging to the membership on updates.

PRC was encouraged to bring forward ideas of topics for the [Practice Advisory Newsletter](#). The next edition is to be circulated at the end of May 2025.

Amendments to the *Construction Act*: PAS, with the support of Policy & Government Relations (PGR) service areas, continue to work on the amendments to OAA resources, in particular the PT.10.0 series as well as the OAA Contracts & Guides. PRC will be invited to review in upcoming months.

Upcoming new versions of CCDC 5A, 5B, 17 and 30 and anticipated impacts on OAA resources: Staff has started the review of advance copies of the documents. And preliminary work has started on Practice Tips in the [PT.23.0 Series](#). PAS staff is attending CCDC in-person seminar in early May.



Updates to OAA-OGCA Document 100: PAS has received new comments from OGCA. These comments are being reviewed.

IO Supplementary Conditions to OAA 600-2021: Refer to Executive Director's May 2025 report for additional context.

Document Development and Maintenance

Resources Impacted by the 2024 OBC

As per the 2025 Work Plan, PRC will continue to support the review of the 2024 OBC impacted Practice Tips, including the code data matrices (if needed). Refer to the December 2024 Council memo entitled "*OAA Document Maintenance - Practice Tips Impacted by OBC 2024*" for reference.

Withdrawal of Practice Tip PT.11 (Refer to Attachment 1): Back in fall 2024 and at first 2025 meeting, PRC was invited to review and provide feedback on the PT.11 Definitions: "Design" v "Design" v "Design Activities". PRC is supportive of withdrawing the resource.

Updates to PT.04 – refer to memo entitled *OAA Document Maintenance - Practice Tips Impacted by OBC 2024: Updates to Practice Tip PT.04* (May 2, 2025)

Various OAA Documents – Work in Progress

Here is a short list of other documents reviewed at PRC at May meeting:

- Updates to Practice Tip [PT.38 OBC Part 5, Environmental Separation - Durability](#) (OBC Impacted Resource) – in progress
- RFP and SofQ Templates (PRC Workplan 2025) – in progress: Following the February meeting, PRC provided some initial feedback on the following two OAA template resources originally published in 2011:
 - [Model Procurement Document](#) (Request For Proposal)
 - [OAA Model Procurement Document](#) (Statement of Qualifications)
- Updates to PT.07 – refer to memo entitled *OAA Document Maintenance - Practice Tips Impacted by changes to the OAA Regulatory Notices: Updates to Practice Tip PT.07* (May 2, 2025)
- Updates to PT.15 – refer to memo entitled *OAA Document Maintenance: Updates to Practice Tip PT.15* (May 2, 2025)

Other general practice topics/Emerging Issues discussed:

Tariffs and impacts on practice: Members of PRC continued to share observations and general concerns. An update was provided to the committee about the ongoing update to the March 2025 Newsletter Article [Potential Tariff Impacts on Projects](#).

Use of AI in practices: The PRC and PAS continued the conversation on the usage of AI in practice and the impact on practices. This information will help support the larger discussion happening on this topic through Council and the Governance Committee.

Action

None. For information only.

Attachments

- Attachment 1: Summary of proposed withdrawal strategy for Practice Tip PT.11

Practice Tip PT.11 – Definitions: “Design” v “Design” v “Design Activities”

Executive Summary

Updated May 2, 2025

Background

- This Practice Tip was originally published as a Practice Bulletin B.19 on April 5, 2006, as noted in 2006 Council meeting records.
- On October 2, 2008, Practice Bulletin B.19 DEFINITIONS: “Design” v “Design” v “Design Activities” became Practice Tip PT.11 Definitions: “Design” v “Design” v “Design Activities”.
- Following research efforts, no further information regarding this Practice Bulletin/Practice Tip was found in the archived Council and Practice Committee records.

Original Requirement to Review/Update

- In light of the release of OBC 2024, this PT was identified as an OAA resource with references to the building code and therefore required review.
- PT.11 was last updated in March 2020 to update the logo.

Overview of the Process and Input from Various Parties

- PAS staff drafted proposed edits to PT.11 for 2024 OBC maintenance updates.
- The proposed updates to the PT were reviewed internally in Oct 2024, where it was noted that the general purpose of the content was unclear, and the publication of a PT, to simply make members aware that the terms ‘design’ and ‘design activities’ are each defined by different statutes, was questioned.
- This PT was initially discussed with PRC in November 2024, where members were asked whether this resource was useful to them and their practice. In general, the following feedback was received:
 - A member noted that, although useful to junior members of the profession, their practice relied little on this resource
 - A member questioned the initial intent of the PT and noted that the value of this PT may be buried in the reason why this resource was created in the first place
- At the February 2025 PRC Meeting, staff advised PRC that the intent of the PT was to make membership aware that the terms may be interpreted to mean different things under different circumstances. The following general feedback was received:
 - Proposed editorial changes were generally accepted
 - The usefulness and relevance of the resource was questioned again by committee members
 - It was noted that although the resource was not regularly used, it can be referenced in discussions with municipalities and clients regarding definitions
 - The PRC Chair had requested additional background information on this resource.
- After the February 2025 meeting, staff did some research. Some historic information was found but no exact information found on the reason for the creation of this resource over 19 years ago.
- Proposal to withdraw PT.11 was reviewed and discussed at PRC meeting held on May 1, 2025. PRC was in agreement to withdraw this Practice Tip.

Proposed Changes to PT.11

- Based on the feedback received from PRC, PAS to:
 - withdraw Practice Tip PT.11 in its current form.
 - at a future time, consider a new practice tip that could bring attention to various terms and definitions in the *Architects Act* which may have varying definitions in other statutes.

Definitions: “Design” v “Design” v “Design Activities”

2020, 2008 Ontario Association of Architects (OAA). OAA members in good standing may reproduce or distribute this Practice Tip provided this copyright notice is affixed to any reproduced or distributed copy. No rights are granted to any other person, except with express prior written consent from the OAA. The OAA reserves all other rights.

Summary

Different connotations are attached to the term “design” in regard to the practice of architecture and when referring to design activities as part of submissions to the Chief Building Official.

Background

The term “design” and variants of the term connote different meanings in different contexts in regard to the practice of architecture.

In daily practice, Architects refer to “design” in terms of preliminary design, schematic design, design development and specifically as a verb in describing the process of conceptualizing a building project, whereas engineers tend to refer to “design” as including not only schematic (or preliminary) design, but also the final construction documents. The colloquial use of the term design by Architects is generally in alignment with the dictionary definition:

“**Design**” as defined by the Concise Oxford Dictionary as a noun means, “a preliminary plan, sketch or concept, for the making or production of a building, machine, garment, etc.”, and as a verb, to “produce a design for” (a building, machine, picture garment, etc.)

However, for purposes of administration of the *Architects Act* and Regulation 27 under the act, the following terms are used as defined:

1. “**Design**” as defined in the *Architects Act* means a plan, sketch, drawing, graphic representation or specification intended to govern the construction, enlargement or alteration of a building or a part of a building;
2. “**Graphic representation**” as defined in the *Architects Act* means a representation produced by electrical, electronic, photographic or printing methods and includes a representation produced on a video display terminal;
3. “**Practice of architecture**” as defined in the *Architects Act*, means,
 - (a) the preparation or provision of a design to govern the construction, enlargement or alteration of a building,
 - (b) evaluating, advising on or reporting on the construction, enlargement or alteration of a building, or
 - (c) a general review of the construction, enlargement or alteration of a building;
4. “**General review**”, in relation to the construction, enlargement or alteration of a building, as defined in the *Architects Act*, means an examination of the building to determine whether the construction, enlargement or alteration is in general conformity with the design governing the construction, enlargement or alteration, and reporting thereon;

A relatively new term, “design activities”, was introduced in an amendment to the *Building Code Act, 1992* in subsection 15.11.(5) and referenced in the amended Building Code (BC). Design activities relates to matters governed by the BC, and care should be taken to understand the differences between this term and other terms incorporating the term “design” in regard to the practice of architecture.

“Design activities” under the *Building Code Act*, 1992 means:

- The preparation of a plan, specification, sketch, drawing or graphic representation
- Providing information or giving an opinion concerning whether a building or part of a building complies with the building code under the *Building Code Act*, 1992.

If the design, information or opinion is to be submitted to a chief building official in connection with:

- an application for a permit;
- a request for an authorization referred to in subsection B(12) or (13) of the *Building Code Act*, 1992;
- a report based on the general review of the construction of a building or part of a building where general review is required by the Building Code.

Note: With regard to the building code requirements for qualifications and registration, all Architects and Licensed Technologists OAA meet the staged requirements.

Suggested Procedure

Familiarize yourself with the differences between “design” as used in reference to conceptual aspects of a project and as defined in the *Architects Act* and “design activities” as defined in the *Building Code Act*, 1992 as amended and referenced in the BC.

When using the term “design” or “design activities” or derivations of these terms in communications, be aware that the recipients of your communications may have different understandings of the terms from those which you intended. If appropriate for better clarity, indicate the context of the terms used in your communications.

References

Ontario [Building Code Act](#), 1992 as amended,

Ontario [Building Code](#) as amended.

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.

Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 6.5.e

From: Settimo Vilardi, Chair, Policy Advisory Coordination Team (PACT)

Toon Dreessen	Ibrahim El-Hajj
Sara Jordao	Mary Ellen Lynch
Cory Stechyshyn	Ted Watson

Date: April 25, 2025

Subject: Update on the Policy Advisory Coordination Team's (PACT) work.

Objective: To update Council on PACT's ongoing work.

PACT met last on April 1, 2025 and will meet again on May 6. During the April 1 meeting, the Committee discussed the Altus report on the Economic Impact of the Architecture Industry, discussed plans for the 2025 Queen's Park Picks, and received legislative updates. More details about these items are included below.

- Big Think with CPEC: PACT and CPEC members will meet on July 7, 2025 to have a Big Think discussion about the 2024 Altus report that highlights the economic impact of the architecture industry in Ontario. In particular, the Big Think will challenge PACT and CPEC members to identify strategic ways to amplify the findings of the report. Since the first iteration of this report in 2018, the findings have been a powerful tool in meetings with elected officials and now there is a desire to expand awareness amongst the general public about the impact of the architecture industry.

Among the key findings of the 2024 report, is that the architecture industry (which includes design and construction) is responsible for 17% Ontario's GDP.

To read the whole report, [click here](#).

- 2025 Queen's Park Picks: Initial correspondence went out to all MPPs on April 16 to encourage them to nominate a building from their communities for consideration as a 2025 QP Pick. Dovetailing on this year's conference theme, MPPs are challenged to identify a "community building". Nominations will be received until May 30.

This year's event is scheduled to take place at the Main Legislative Building at Queen's Park in Toronto on October 21 from 5:30 – 7:00 p.m.

We are already encouraged as we have two submissions and have confirmed two MPP meetings as of preparation of this memo.

- Bill 2, *Protect Ontario Through Free Trade Within Canada Act, 2025*: On April 16, 2025, government introduced Bill 2, *Protect Ontario Through Free Trade Within Canada Act, 2025*. If passed, this legislation is expected to create new opportunities for job creation and investment attraction, supporting economic integration across Canada and cutting costly and unnecessary red tape to help protect and grow Ontario and Canada's economies.

The legislation has been referred to Second Reading and OAA staff is closely monitoring its progress and any opportunities for comment. The introduction of Bill 2 was anticipated and a letter was pre-emptively issued to Hon. Doug Downey, Attorney General, to express the OAA's position on free trade and labour mobility legislation.

As stated in that letter, the OAA supports the introduction of free trade and labour mobility legislation; however, it cannot impact the protection of public safety that has been entrusted to professional regulators, including the OAA as it relates to the practice of architecture in Ontario. To read the complete letter, [click here](#).

Action

None. For information only.

Attachments

None.

Memorandum

To: Council

William (Ted) Wilson	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	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING
May 13, 2025
(open)
ITEM: 7.1

From: Settimo Vilardi, Immediate Past President and ROAC Board Member

Date: May 1, 2025

Subject: **Report on Semi Annual meeting of the Regulatory Organizations of Architecture in Canada (ROAC)**

Objective: To provide a summary of key items discussed at the semi-annual meeting of the Regulatory Organizations of Architecture in Canada (ROAC).

The spring semi-annual meeting of ROAC was held on April 26 in Montreal. As a reminder, Immediate Past President Vilardi serves as the OAA representative to the Board of Directors of ROAC. Also attending was President Ted Wilson, OAA Registrar Christie Mills and Executive Director Kristi Doyle.

In addition to the Meeting of the Board, the Senior Administrators of each of the architectural regulators met the day prior to discuss matters of an administrative and operational nature, as well as issues of mutual interest that may be happening in each jurisdiction. The ROAC Board Chair, currently Architect, Ian MacDonald also joined the Administrators for this meeting. Mills and Doyle attended the Administrators meetings on behalf of the OAA.

The following key items were included on the agenda of the May 26 Board meeting.

Standing Committee Reports

International Mobility Committee (IMC)



IMC Chair Scott Kemp attended the meeting in person and presented an update to the Board regarding the status of various Mutual Recognition Agreements (MRAs). Of specific note, the MRA between Canada and the United Kingdom was officially signed on April 23 in Toronto and come into force on May 14. In attendance at the ceremony was President Wilson, IPP Vilardi and Executive Director Doyle.

The ROAC Board also provided its final approval of the updated MRA between Canada and the US. Next steps in the process include the approval by the NCARB Member Boards in June.

The Chair reported as well that interest in exploring an MRA with Canada has been signaled by the Philippines and Taiwan.

Finally, the ROAC Board adopted a set of principles that will guide ROAC/IMC in reviewing potential MRAs as well as updating existing MRAs.

Committee for the Examination in Architecture (CEXAC)

CEXAC Chair Jeff Laberge joined the meeting virtually to present an update on Committee activities as well as the examination. The Committee of the ExAC (CEXAC) provides oversight of administration, and its members are selected by the various Licensing Authorities that make up its composition. CEXAC has just completed its annual exam vetting session in Vancouver in preparation for the Fall 2025 exam administration. All activities regarding the exam cycle are on track and registration for the 2025 sitting will open the first week of June.

The ROAC Board approved the release of a Request for Quotation to a shortlist of software vendors for a new examination platform as part of the ongoing exam modernization project.

ROAC CACB Working Committee

Committee member John Stephenson attended virtually on behalf of the Chair who was unable to attend. Key priority items addressed by the Committee since the last ROAC meeting included the drafting of a new agreement between the CCUSA and ROAC in relation to funding for accreditation which is administered by the CACB on behalf of the two parties. The new agreement is subject to approval by each of the architectural regulators and will be presented to the OAA Council under separate cover for its consideration.

A new Terms of Reference (TOR) for the committee was circulated for review. Major changes to the format were made, although the general mandate, composition, and responsibilities were unchanged. The committee's name was changed from "ROAC Liaison Committee to CACB" to "ROAC CACB Working

Committee” which better represents the way the committee operates. The New TOR is being circulated to all member organizations for review and approval.

The Committee report also included an update on the status of proposed changes to the Conditions & Terms for Accreditation as suggested by the CACB Writing Committee. The ROAC CACB Working Committee has recommended that the work of the Writing Committee be paused until the CACB Bylaw review is completed and appropriate changes made to clarify the hierarchy of governance documents.

Finally, it was confirmed that in late February, the Committee received confirmation from the Federal Government that the ESDC (Employment Social Development Canada) grant for \$458,000 had been approved. As additional context, ESDC approached the Committee/ROAC to submit a concept paper to further work associated with foreign trained architects becoming registered in Canada. This funding is tangentially related to funding previously received for the development of the Broadly Experienced Foreign Architect (BEFA) program. Work on this project will begin in May.

Approval of Year End Audited Financial Statements

In anticipation of the Annual General Meeting, ROAC auditors joined the meeting to present the year end audited financial statements. The Board approved the statements which were received later in the day during the Annual General Meeting.

Approval of Strategic Plan

The final draft of ROAC’s five-year strategic plan was presented to the Board. The Plan was the result of a strategic planning process lead by Arsenal and included a full day workshop with the ROAC Board and Administrator’s at the OAA Headquarters during last fall’s ROAC meeting. The Plan was approved and is currently being formatted for publication on the ROAC website. The three strategic pillars established for ROAC include: *Advancing National Collaboration & Influence; Enhancing ROAC’s Activities-Services and Professional Foresight; and Elevating Governance Excellence*. Specific initiatives within these objectives are being identified and formalized within yearly work plans. The Strategic Plan will serve as an important tool to focus the work of ROAC over the next five years.

CACB Report

CACB President Robert Bateman and Executive Director Mourad Mohand-Said joined the meeting in the afternoon and made a short presentation to the Board on the latest activities of the CACB. A copy of the Report is attached.

Labour Mobility Legislation

Information was shared around the table regarding recent labour and trade mobility legislation being introduced in various provinces in response to the current economic and political climate.

In addition to the above priority items, the Board also received a presentation from the Director of Athabasca University (AU), Douglas McLeod. AU had requested time on the agenda to describe the details of their curriculum and online format. AU is interested in seeking accreditation as a school of architecture. At the present time, however, AU does not meet the requirements of accreditation as set out in the approved Conditions & Terms for Accreditation.

Following the Board meeting, the necessary Annual General Meeting of the organization was held. Usual business matters were addressed including receipt of the audited year-end financial statements and approval of the slate of directors for a three-year term.

Action:

This report is for information.

Attachments:

CACB Latest Activities Report April 2, 2025



CACB-CCCA Latest Activities

Prepared for the Regulatory Organizations of Architecture in Canada (ROAC) Board Meeting.
Montréal, QC, April 26, 2025

Mourad Mohand-Said B.Arch, M.Sc.A, Hon. MRAIC
April 2, 2025

Table of Contents

1. RECENT ACTIVITIES	2
BOARD'S ACTIVITIES.....	2
PROGRAMS OPERATION.....	4
ACCREDITATION PROGRAM.....	4
ACADEMIC CERTIFICATION PROGRAM.....	6
ECA Service	8
BEFACERTIFICATION PROGRAM.....	11
BEFA Mentorship Service	12
 2- INTERNATIONAL INVOLVEMENT	 13
THE CANBERRA ACCORD.....	13

1. RECENT ACTIVITIES

BOARD'S ACTIVITIES

Leadership Adjustment

The Board has adjusted its Executive Committee composition following Peter Osborne's departure due to personal matters. To ensure governance continuity, the Board has appointed Rob Bateman, the current Treasurer, as President for a two-year term and Philippe Lemay as Treasurer. The updated Executive Committee is as follows:

- Rob Bateman – President
- Tammy Gaber – Vice President
- Vivian Lee – Secretary
- Philippe Lemay – Treasurer

Peter's vacancy on the Board will be filled through a Call for Nominations that the CACB will soon issue to the Members via the Nominating Committee.

2025 Board Meetings:

The Board just held its first of four annual meetings virtually on March 31, 2025. The remaining three meetings are scheduled as follows:

- 2- June 13-14, 2025: Halifax, NS
- 3- September 26, 2025: Virtual
- 4- November 21-22, 2025: Toronto, ON.

Update of the Conditions and Procedures for Accreditation:

The progress made by the Writing Committee following the 2022 CACB Conference has been insufficient to develop an updated version of the Conditions for Accreditation.

This delay is largely due to divergent opinions among Members on key issues related to the interpretation of specific by-law articles governing the Accreditation Program: The Conditions for Accreditation or the Canadian Education Standard.

As long as these differing perspectives remain unresolved, the Committee is unable to move forward. The delay is significant, as the 2026 visits will proceed under the current 2017 version of the Conditions and Terms for Accreditation.

The CACB urgently seeks its Members to reach consensus and provide clear direction on how to move forward.

Update of the By-law.

The CACB has forwarded proposed updates to the By-laws, last revised on October 31, 2016, to the Members, including CCUSA and the ROAC Standing Committee on behalf of ROAC. These updates were submitted for review on July 22, 2024, with a deadline for feedback set for October 31, 2024. The CACB has received comments and suggestions only from CCUSA, while feedback from ROAC is still awaited.

Accreditation Funding Agreement Renewal

The Members appointed a Joint Working Group to renew the funding agreement for the Accreditation Program, which expired on December 31, 2024.

After several meetings, the Group reached consensus on a six-year funding agreement, which will be brought to their respective members for ratification.

The Agreement will be effective from January 1, 2025, and will expire on December 31, 2030.

CACB 2025 Budget Approval

Tied to the work of the Joint Working Group on the Accreditation Program Funding Agreement, the Members agreed on a provisional budget while finalizing the agreement. The 2025 budget will be updated upon ratification of the Funding Agreement and will reflect the terms outlined in the agreement.

Call for Nominations Board of Directors

A call for nominations for four Directors will be issued to the Nominating Committee to:

- Replace three Directors—Baldwin Hum (ROAC), Lisa Landrum (CCUSA), and Shane Laptiste (ROAC-CCUSA)—whose terms end in November 2025 (3-year term).
- Fill the vacancy left by Peter Osborne's departure (2-year term).

PROGRAMS OPERATION

ACCREDITATION PROGRAM

Program Highlights:

Call for Nomination for Visiting Team Members

Following our call for nominations to ROAC for two practitioners and two interns, and to CCUSA for at least 10 educators, we received:

- ROAC: 3 nominations (75%): 2 practitioners and 1 intern.
- CCUSA: 5 nominations (50%): McGill (1), University of Toronto (2), Université de Montréal (2).

The call for CCUSA nominations was included in our December newsletter, posted on LinkedIn, and emailed to all CCUSA members in late January. However, we are still in need of additional educators on our roster. Additionally, a call for student nominations was issued to CASA with a submission deadline of April 4.

2025 maintenance accreditation visits

The University of British Columbia and the University of Manitoba have been completed.

- UBC: Virtual assessment on January 18; on-site visit from March 9 to 11; and
- University of Manitoba: Virtual assessment on January 25; on-site visit from March 16 to 18.

The visiting teams for both institutions have completed drafting their Visiting Team Reports (VTRs), and the y have been forwarded to the programs for correction of facts.

Feedback from both visits was largely positive, however, some concerns were raised at UBC regarding the organization of the online platform for student work and concerns at U of M regarding communication issues between the Programs. To gather further input, surveys will be sent to the program heads and visiting teams as outlined in Appendices 4, 5, and 6.

2026 maintenance accreditation visits

Planning is underway for the 2026 accreditation visits, which will include:

- Toronto Metropolitan University (TMU)
- University of Toronto
- McGill University
- Université Laval.

Emails have been sent to the roster to gauge interest in joining the visiting teams, and contact with potential team chairs is in progress. One-year advance emails and six-month APR submission notices have been sent to each program head.

Note: McGill University is currently on a two-year probation due to its failure to submit the APR on time for its previously scheduled 2025 maintenance visit.

Revision of the 2017 edition of Procedures for Accreditation

The 2017 edition of the CACB Procedures for Accreditation is being revised to incorporate the hybrid format of the accreditation visit agenda and clarify certain sections to improve the procedures.

Training materials Update

We are currently revising and updating the CACB training program to better align with the hybrid format of accreditation visits. Updates include:

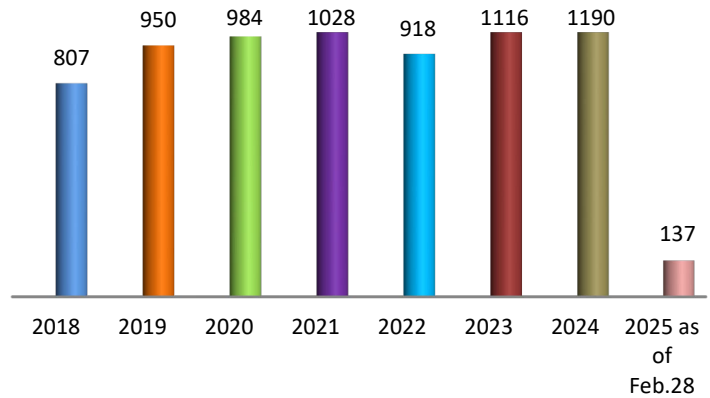
- Redesigning training materials for program heads, team chairs, and visiting teams to specify both virtual and on-site components.
- Introducing virtual sessions, similar to NAAB's open office hours, to provide programs with an opportunity to engage with CACB, ask questions, and discuss innovations.
- Exploring collaboration with RAIC to potentially offer CACB training sessions at RAIC conferences, providing additional support on accreditation-related matters.

ACADEMIC CERTIFICATION PROGRAM

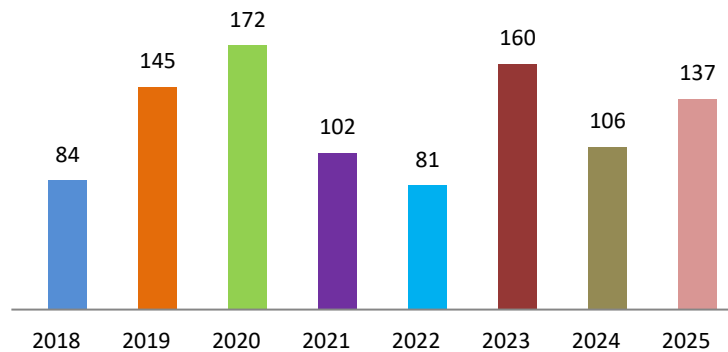
Statistic Highlights

Applications Received

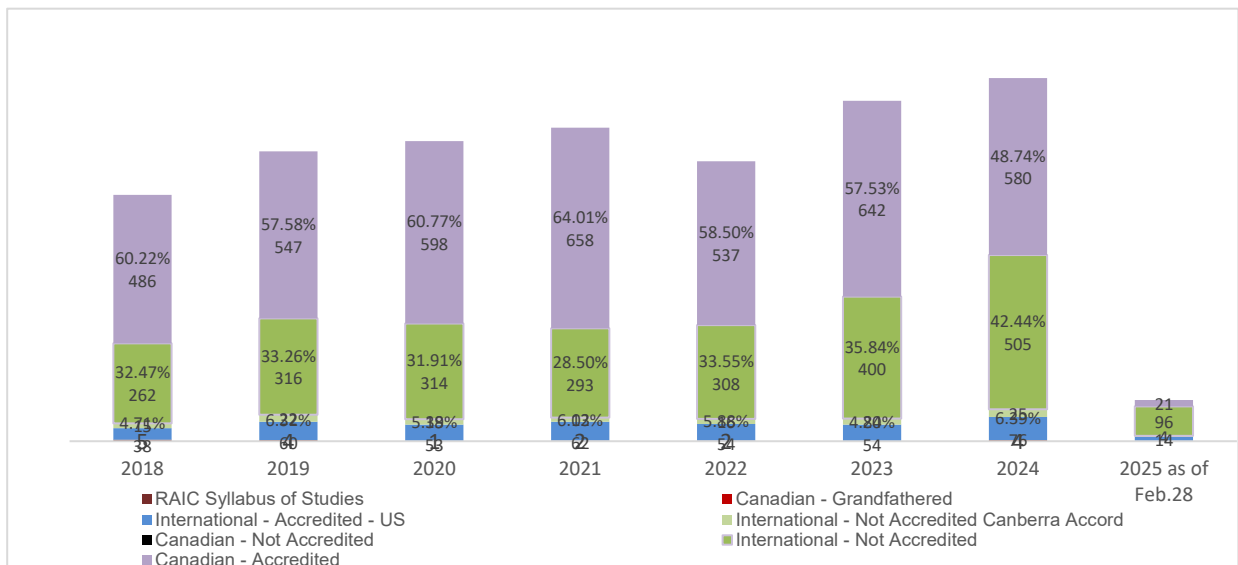
An average of 1000 applications per year were received for all modes of Academic Certification between 2018 and 2024.



According to the end-of-February figures in the table, the 2025 year-end numbers are expected to be higher than those of 2024.

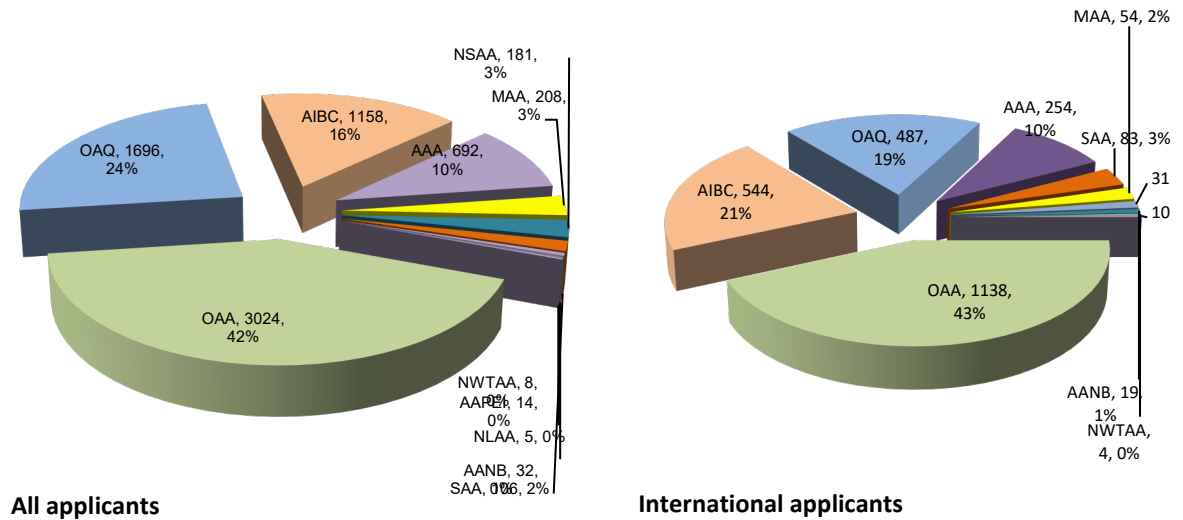


Applications Received by modes of certification



On average, **41.18%** of CACB Academic Certification applications received between 2018 and 2024 were from international graduates, including those from the USA, while **58.19%** were from Canadian-accredited applicants.

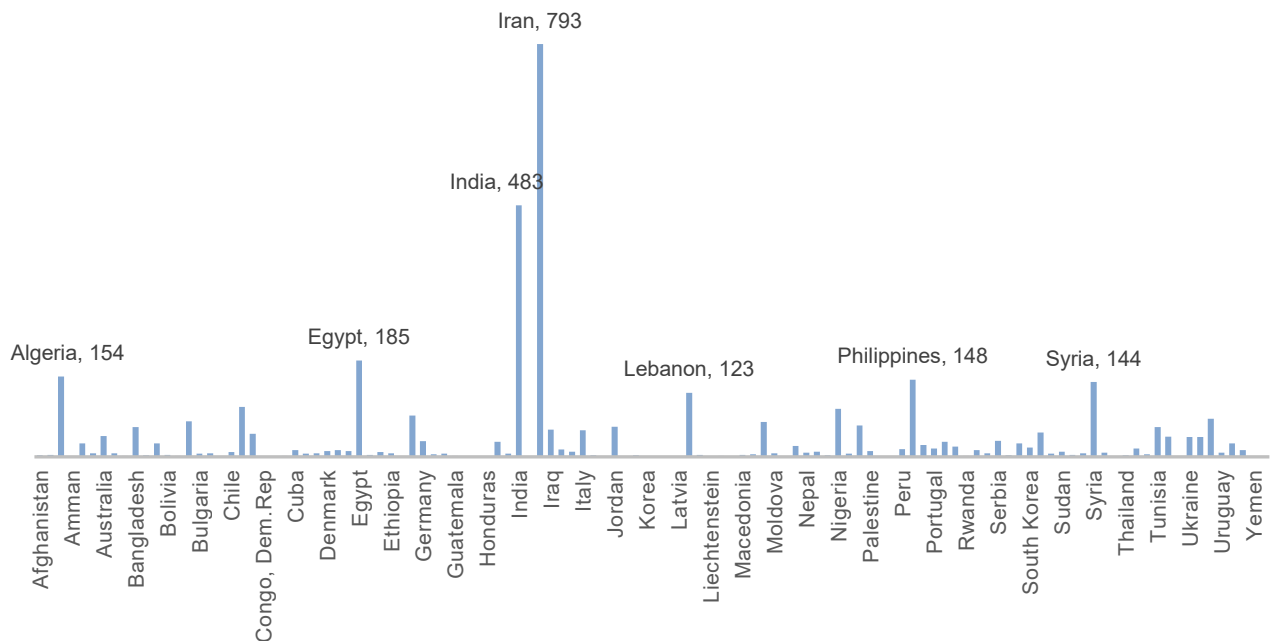
Applications Received by Jurisdiction



Ontario (43%), British Columbia (21%), Québec (19%), and Alberta (10%) are the most sought-after jurisdictions for international applicants.

Country of Origin of Foreign Graduate Applicants

Iran, India, and Egypt are the Top 3 countries of origin. Algeria is the first francophone country of origin



ECA Service

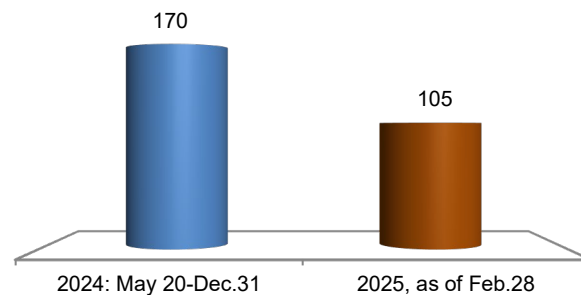
Effective May 20, 2024, the CACB is recognized by IRCC as the professional body to issue [educational credential assessments](#) (ECAs) for architects interested in immigrating to Canada for those whose architecture is their primary occupation.

ECAs Reports issued by the CACB will determine how foreign educational credentials compare to Canadian credentials required to practice architecture and will also confirm eligibility for the Academic Certification Program.

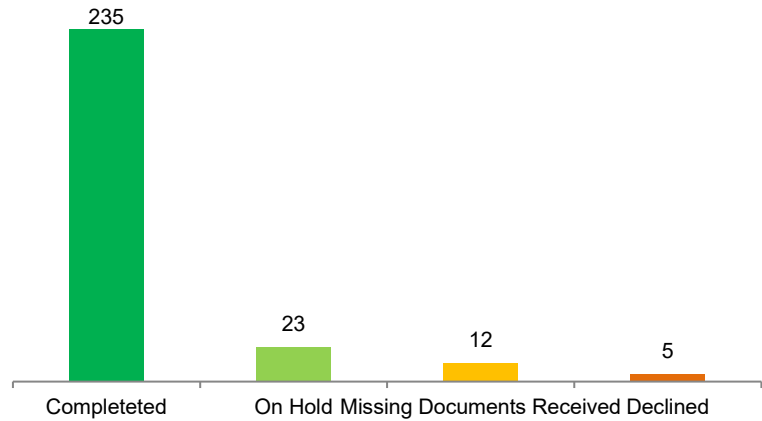
Statistic Highlights

Applications Received

As of February 28, 2025, the CACB has received a total of 275 ECA applications.

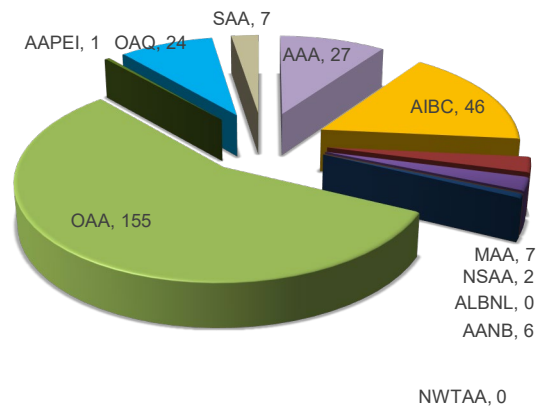


As of February 28, 2025, the CACB has issued (completed) 235 ECA reports (85%), while 23 applications are on hold, 12 are being assessed (missing documents received), and 5 have been declined.

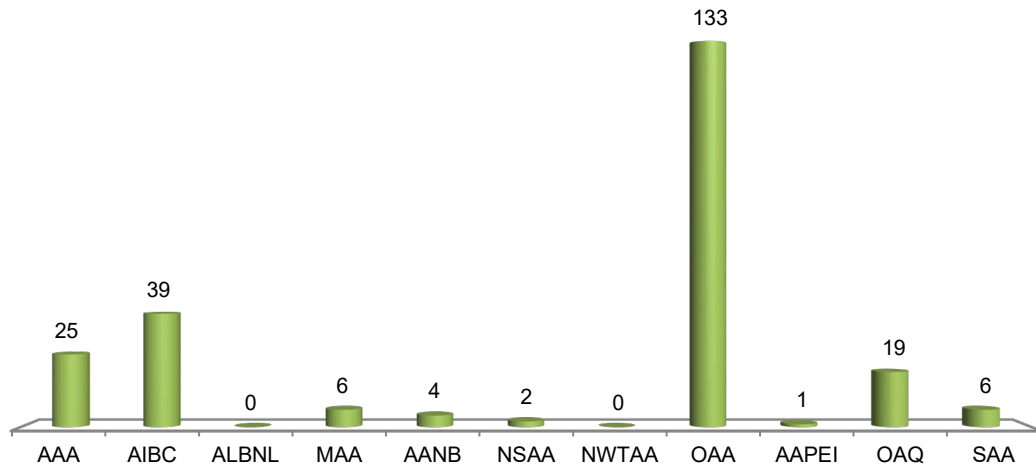


Applications Received by desired jurisdiction

ECA figures align with Academic Certification figures in terms of preferred jurisdictions: Ontario, British Columbia, Alberta, and Québec remain the most sought-after.

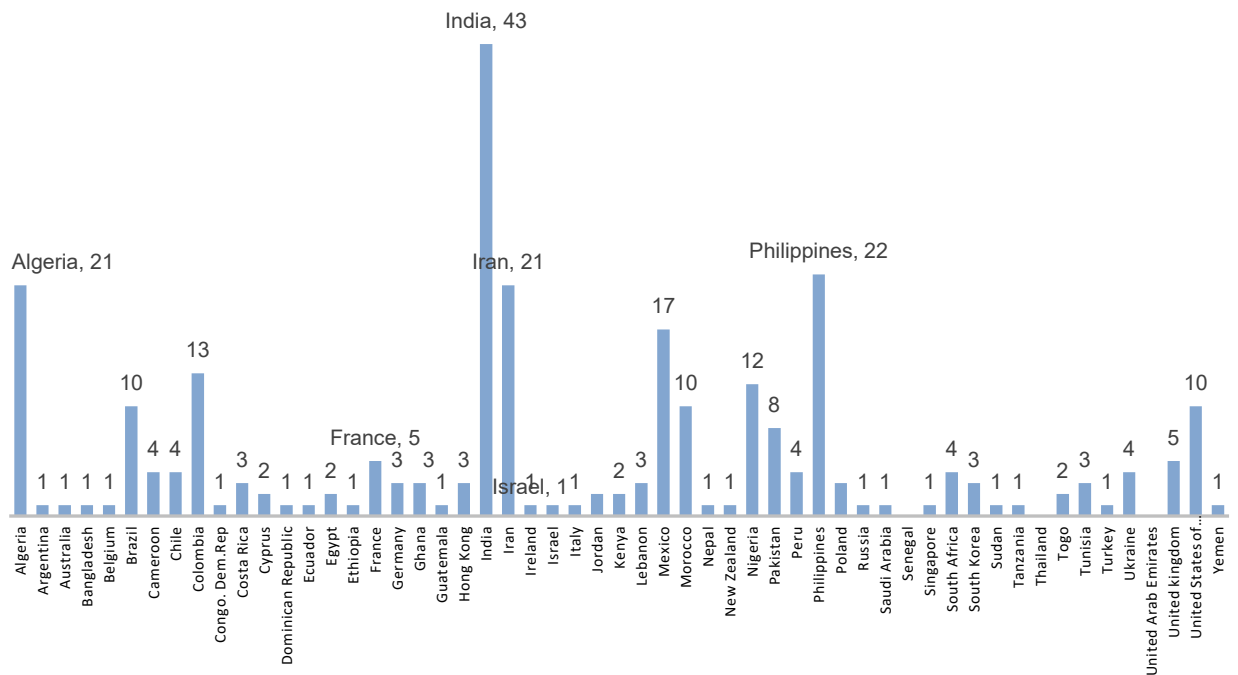


ECA Reports issued (completed) per jurisdiction



ECA Applications per Country of Origin

India, the Philippines, Iran, and Algeria are the top four countries of origin for ECA applicants



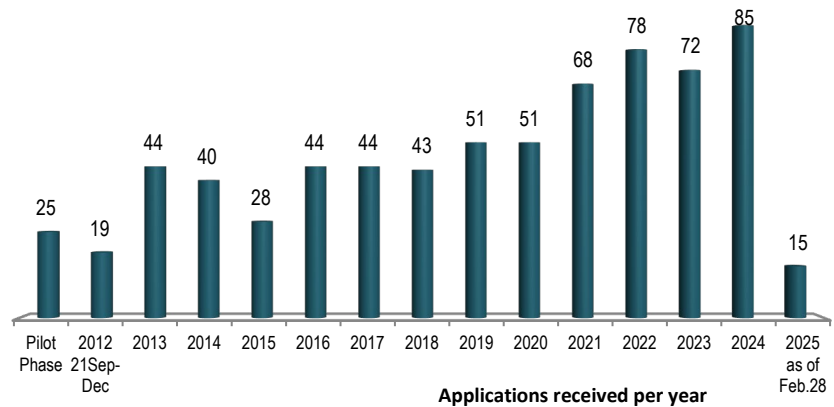
BEFACERTIFICATION PROGRAM

Statistic Highlights

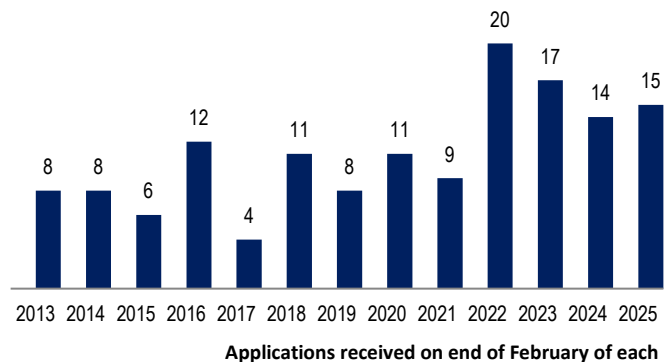
Applications Received

As of February 28, 2025, a Grand Total of 707 applications has been received since the official launch of the BEFA Program on September 21, 2012.

Since 2021 the total of new applications received is higher than 65.

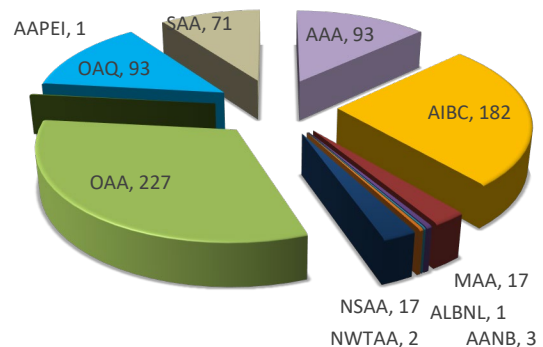


End of February figures suggest that by the end of 2025, we will likely receive similar number than in 2024.



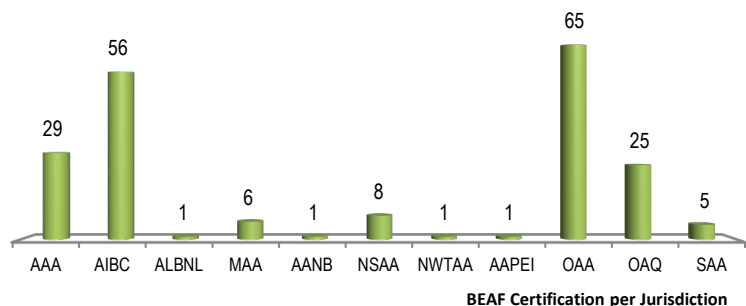
Desired Jurisdiction for Registration

The BEFA applicants expressed interest in registration with the following Jurisdictions distribution: Ontario: 227; British Columbia: 182; Alberta: 93; Québec: 93; Saskatchewan: 71; Nova Scotia: 17; Manitoba: 17; New Brunswick: 3; Northwest Territories: 2; Newfoundland and Labrador: 1; and Prince Edward Island: 1



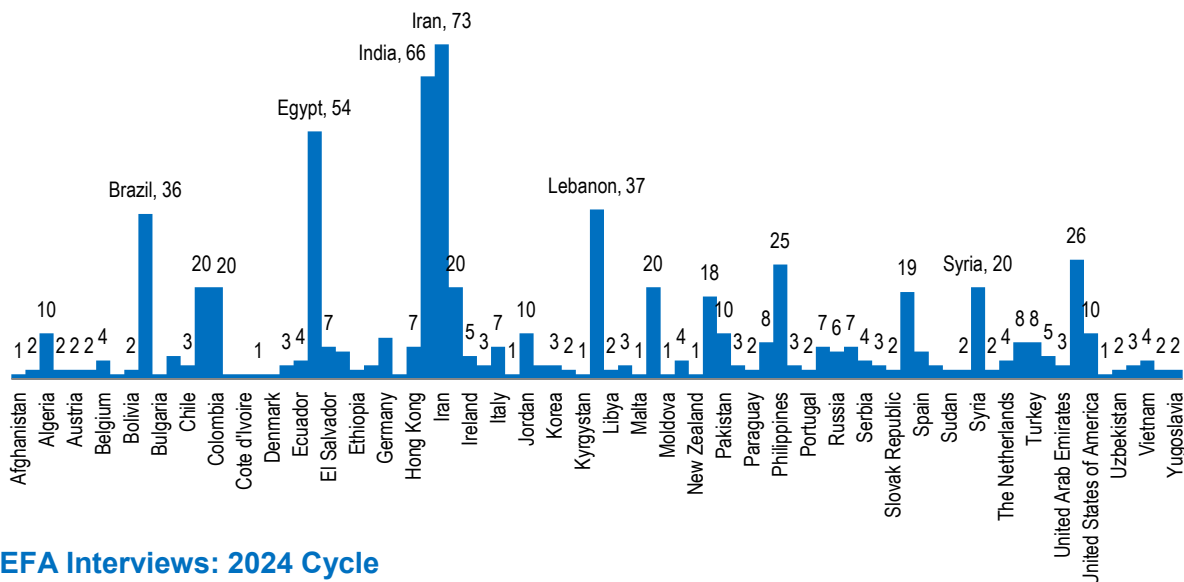
BEAF Certification

A total of 198 applicants have been granted BEFA Certification as of February 28, 2025, with the Jurisdictions distribution outlined on the table opposite:



Country of Origin of BEFA Applicants

Iran, India, and Egypt are the Top 3 countries of origin



BEFA Interviews: 2024 Cycle

35 Interviews in 2024, 5 remote and 30 in person with the following results:
24 certification and 11 remedial.

BEFA Interviews: 2025 Cycle

- May 24th Vancouver: 3 interviews (TBC)
- June 7th Montreal: 13 interviews (TBC)
- Fall Interviews: November 22nd and 29th locations to be confirmed.

Training for new Assessors:

5 new trained assessors (NSAA, OAA-2, SAA, and AIBC) participated in the fall 2024 interview sessions as observers.

All 5 new assessors are currently sitting on one or more panels.

Next training session to start October 2025.

BEFA Mentorship Service

Following the successful 2024 Pilot Phase, the Mentorship Service was formally implemented in January 2025.

During the Pilot Phase, six applicants benefited from the Mentorship Service:

- Four have been certified
- One was assigned remedial work
- One is eligible for an interview in 2025

Since implementation:

- Five mentors were trained on February 21, 2025
- Three mentees have been identified, with two already receiving service from an assigned mentor

Currently interviewing for a BEFA Mentorship Service Administrator

2-INTERNATIONAL INVOLVEMENT

THE CANBERRA ACCORD

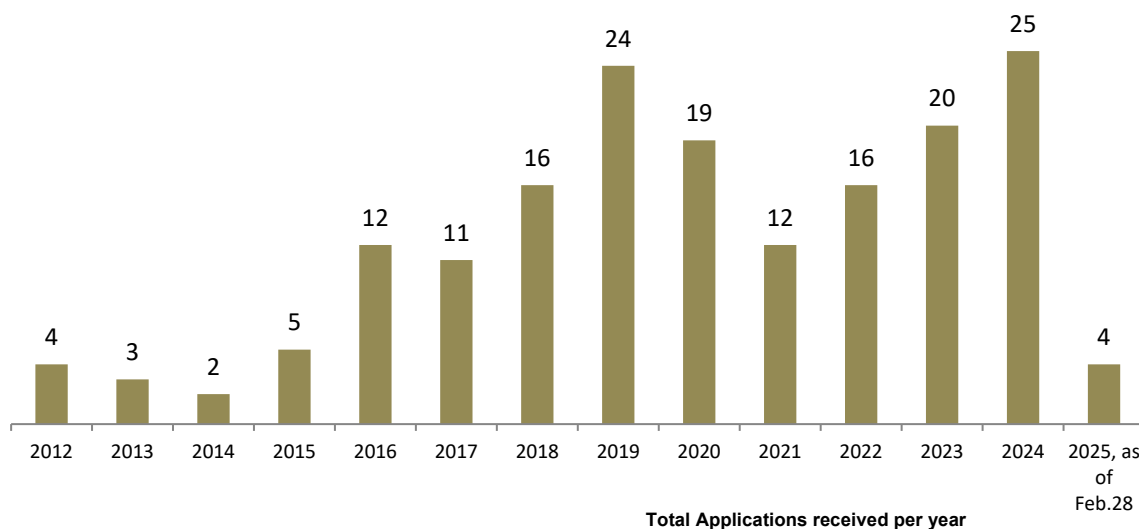
The CACB-CCCA is one of the ten (10) signatories of [the Canberra Accord](#). The latter consists of accrediting organizations that have substantial equivalent established accreditation systems for architectural education.

General Meeting

The CACB is attending the 10th General Meeting on June 26-27, 2025 in shanghai, China,

International mobility of graduates and the portability of their educational credentials.

The CACB-CCCA has developed a specific assessment stream for Canberra Graduates since 2012. As of February 28, 2025, **173** applications were received.



The applications were received with the following signatories and Jurisdictions distribution:

