Ontario Practice Competencies Self-Assessment Guide

OAA Technology Program

ONTARIO ASSOCIATION OF ARCHITECTS (OAA)

Ontario Association of Architects

111 Moatfield Drive
Toronto, ON M3B 3L6
Canada

416-449-6898
oaamail@oaa.on.ca
oaa.on.ca

Background

It is the OAA's position that local Ontario practice knowledge is critical to public health and safety, as well as the provision of competent architectural services in the province. To have confidence in the capability and effectiveness of new Licensed Technologists, the public needs to know that Intern Technologists possess the applicable project experience serving clients.

All those seeking limited licence as prescribed by the regulations via the OAA Technology Program (OTP) must demonstrate Ontario practice competency gained within the architectural practice or eligible place of employment under the direct supervision of a Supervising Professional. The practice competencies are acquired via experience or activities. Experience assessments are focused on performance in practice as distinct from what an individual would do in a test or academic situation.

The Ontario practice competencies are derived from established Canadian architectural competency frameworks, the OAA Experience Requirements Committee (ERC), and the OTP. These sources establish the foundation for the Association's expectations regarding essential knowledge in local regulations, environmental obligations, industry standards, safety awareness, contractual responsibilities, and professional accountability.

The Ontario practice competencies are specific to the following practice areas:

- Programming;
- Schematic Design;
- Code Research;
- Building Cost Analysis;
- Construction Documents;
- Contract Administration; and
- Professionalism and Practice.

Traditionally, the acquisition of local practice knowledge has been a time-based requirement, typically satisfied by working in an Ontario environment for at least six months and by demonstrating the appropriate level of local proficiency has been attained regarding applicable architecture laws, practices, standards, codes, conditions, and climate.

Following amendments to the *Fair Access to Regulated Professions and Compulsory Trades Act* (FARPACTA) related to licensure experience requirements, the OAA has created an experience self-assessment to evaluate Ontario practice knowledge in Intern Technologists.

The intent of the experience assessment is to:

- Provide clear and transparent evaluation for the determination of satisfactory architectural competency in an Ontario environment or equivalent;

- Maintain and uphold high standards for the architecture profession; and
- Reduce reliance on time-based direct work requirements.

The benefits of using experience competency assessments include increased objectivity, consistency, and legitimacy in evaluating an individual's potential for success in a particular role. Competency assessments can also help individuals identify areas for development and improvement, which can be used to guide training and professional development plans.

Self-Assessment Process

Submissions	Prior to making application for limited licence, Intern Technologists[1] who have completed all of their Experience Record Book (ERB) experience while enrolled in the OAA Technology Program will be required to evaluate if they have gained experience in all of the targeted Ontario practice competencies. For each of these 10 Ontario competencies, an individual is required to review their ERB records for examples of the experience activity. Competencies are defined as observable and measurable knowledge, skills, or abilities required for limited licence that are demonstrated through the experience activity. “Indicators” are defined as specific examples of a) knowledge application; b) actions and skills; and c) traits and behaviours that demonstrate the achievement of a competency. This document and the self-assessment include a list of indicators for each competency to guide Intern Technologists. Intern Technologists may consider examples gained on international projects for the Ontario practice competencies. However, the Intern Technologist has the responsibility to establish equivalency. It is possible for an example to take place outside the province and satisfy the Ontario practice competency as long as the ERB record review sufficiently establishes equivalency and is then validated by the Supervising Professional.
Validation	The Intern Technologist’s experience self-assessment will require validation from a Supervising Professional who has direct, personal, and professional knowledge of the Intern Technologist and the competencies they have been asked to validate. The Supervising Professional must be pre-approved with the OAA.[2] The Supervising Professional is the Architect or Licensed Technologist within the architectural practice or place of employment who personally supervises and directs the Intern Technologist on a daily basis. The Supervising Professional must be registered/licensed in the jurisdiction in which the individual is gaining

[1] Intern Technologists who attend an Experience Requirements Committee assessment will not be subject to this requirement unless directed by ERC.

[2] Individuals who successfully completed the OAA Technology Program requirements before May 10, 2023, are authorized to validate their own experience assessment.

the experience. They must be able to assess the quality of work performed and validate the experience assessment.

The Supervising Professional must be familiar with the OAA Technology Program objectives and experience requirements.

Validation by the Supervising Professional of the Ontario competency self-assessment is required prior to submission to the OAA. Should a Supervising Professional not agree with the Intern Technologist's self-assessment, the submission should be reviewed with the Intern Technologist to address any deficiencies or misalignments. The result of this discussion may be:

- clarification to the existing self-assessment so that it may be validated by Supervising Professional; or
- requirement for the Intern Technologist to gain more experience for this competency before validation.

Review

Once a key Ontario practice competency self-assessment form has been validated by the Supervising Professional, the OAA will receive, review, and confirm receipt. There may be instances where the OAA will require clarification for a submission. Completed submission will be recorded to the Intern Technologist's OAA records.

In the event an Intern Technologist is unable to successfully complete the Ontario practice competency requirement prior to application for limited licence, the Intern Technologist may be required to attend an Experience Requirements Committee assessment interview.

Key Ontario Practice Competencies

Standards	Provincial legislation has given the Ontario Association of Architects the authority and the responsibility to establish standards of admission and competence for applicants seeking limited licence to practise architecture in Ontario. These standards are embodied in the OAA Technology Program Guide, which is the primary document that establishes consistent criteria that individuals seeking limited licence must meet, regardless of their chosen path to licensure. Professional standards are also informed by the OAA's Strategic Plan, OAA statutory committees, and national competency standards related to the practice of architecture.
Ontario Practice	The OAA has identified 10 specific competencies within the practice areas for which proficiency should be verified prior to licensure. These competencies may be gained via work in Ontario, but they may also be gained outside of the province through equivalent or similar experience. The onus is on the Intern Technologist to review and determine they have gained experience that clearly demonstrates competency in these areas. These 10 Ontario practice competencies have been identified to demonstrate knowledge and experience of Ontario regulations, codes, industry standards, environmental obligations, contractual awareness, and professional accountability.

Validator Information

Supervising Professional	Supervising Professionals reviewing and validating the Ontario practice competencies must be familiar with the Intern Technologist's work history to ensure the experience is sufficient in breadth, depth, and quality to demonstrate competency. This document and the indicators can also provide appropriate guidance. While Intern Technologists may consider international experience for Ontario practice competencies, Supervising Professionals should note the Intern Technologist has the responsibility to establish equivalency. It is possible for an experience to take place outside of Ontario and satisfy the Ontario practice competency. As part of the validation, Supervising Professionals will confirm if the assessment information is accurate. To validate the experience assessment, Supervising Professionals will confirm they agree with the self-assessment provided by the Intern Technologist. This document and the submission form provide guidance on the expected competencies and what each means. If a Supervising Professional feels that the Intern Technologist has not satisfied one or more of the Ontario practice competencies, they are required to discuss any deficiencies with the Intern Technologist and determine if there is a misunderstanding. Alternatively, the Intern Technologist may need to gain more experience to satisfy the competency or competencies in question. In validating an experience assessment submission, the Supervising Professional is confirming to the OAA that an Intern Technologist has satisfied the Ontario practice competency assessment. Their review and validation are taken seriously by the Association, with final approval made by the OAA.

Competency 1: Incorporate principles of sustainable development within an architectural program.

Practice Area: Programming

Minimum Competency Level	**3 - Application** "Application" refers to the ability to use learned material in new and concrete situations. This may include the application of such things as rules, methods, concepts, principles, laws, and theories.
Indicators	***Identify design issues that maximize the benefits of existing environmental conditions.*** ***Apply the principles of sustainable and resilient development.***
Programming Practice Area	Programming is the process of setting forth in writing the client's requirements for a given project. Steps in this process include establishing goals, considering a budget, collecting, organizing, and analyzing data, identifying and developing concepts, and determining general needs. The Client–OAA Member agreements often presume that the client will furnish the program. Involvement of the OAA member in writing the program will be a service not covered in the traditional agreement for Design and Contract Administration. However, many clients employ the OAA member to assist in preparing a functional program. The project may also be affected by the mortgage lender, future tenants, public officials involved in health, welfare, and safety, and, increasingly, the people who will work in the built environment. Their input at the programming stage could be essential to maintain an orderly design process.

Competency 2: Analyze design principles and solutions in relation to context.

Practice Area: Schematic Design

Minimum Competency Level	**4 - Analyze** “Analyze” refers to the ability to break down material into its constituent parts and determine how the parts relate to one another and/or an overall structure or purpose. This may include the identification of the parts, analysis of the relationship between parts, and recognition of the organizational principles involved.
Indicators	***Explain social consequences—positive and negative.*** ***Explain contextual/environmental/community influences.***
Schematic Design Practice Area	From the client-approved program, the OAA practice develops alternative solutions to satisfy the technical and aesthetic requirements. Preferred schemes are presented until the owner and OAA practice can agree on one.

Competency 3: Consider the principles of energy efficiency and environmental impacts.

Practice Area: Schematic Design

Minimum Competency Level	**5 - Evaluate** “Evaluate” refers to the ability to make judgments based on criteria and standards. Examples may include detecting inconsistencies or fallacies within a process or project, determining whether conclusions follow from observed data, judging which of two methods is the correct way to solve a problem, or determining the quality of a solution based on required criteria.
Indicators	***Evaluate passive and active design solutions.*** ***Evaluate strategies for compliance with applicable energy and emissions objectives.*** ***Understand the principles of carbon consumption related to building design/construction process.***
Schematic Design Practice Area	From the client-approved program, the OAA practice develops alternative solutions to satisfy the technical and aesthetic requirements. Preferred schemes are presented until the owner and OAA practice can agree on one.

Competency 4: Apply cost-estimating methods to a project.

Practice Area: Building Cost Analysis

Minimum Competency Level	**3 - Application** "Application" refers to the ability to use learned material in new and concrete situations. This may include the application of such things as rules, methods, concepts, principles, laws, and theories.
Indicators	***Organize resources available to prepare a cost estimate.*** ***Apply cost estimating methods to different building types and/or delivery models.*** ***Apply preferred methods of cost estimation (unit price, elemental, divisional, assembly, etc.).***
Building Cost Analysis Practice Area	An important responsibility of the OAA practice is to evaluate the estimated project construction cost. Accurate estimates are crucial to the client. They influence decisions involving basic design, selection of building products and systems, and construction scheduling. The tax impact of material and system section, as well as long-term maintenance, are additional factors that bear on development of the project. For their own preliminary analysis, most OAA members use computations based on area and/or volume. Estimates of cost provided later in the design process are frequently made on the basis of labour and material requirements (quantity surveys)—a method requiring a more specialized knowledge of construction costs.

Competency 5: Apply code requirements to the design process.

Practice Area: Code Research

Minimum Competency Level	**3 - Application** "Application" refers to the ability to use learned material in new and concrete situations. This may include the application of such things as rules, methods, concepts, principles, laws, and theories.
Indicators	***Apply building classification and construction requirements for a proposed building.*** ***Apply fire safety requirements for a proposed building.*** ***Apply floor area safety requirements for a proposed building.*** ***Apply barrier-free requirements for a proposed building.***
Code Research Practice Area	Building inspectors, as well as officials in zoning, environmental, and other agencies relating to the health, welfare, and safety of the public, oversee the enforcement of federal, provincial, and local regulations related to building construction. The codes promulgated by these various agencies have a direct bearing on the total design process. Thorough knowledge of all requirements is essential to the satisfactory completion of any project.

Competency 6: Create a building envelope (design and detailing).

Practice Area: Construction Documents

Minimum Competency Level	**6 - Create** “Create” refers to the ability to put elements together to form a new coherent or functional whole, as well as to reorganize elements into a new pattern or structure (e.g. design a new building envelope, write a thesis, develop an alternative hypothesis based on criteria, invent a product). For example, you are able to create, develop, produce, plan, modify, construct, etc.
Indicators	***Select and assemble the components of a building envelope.*** ***Design assemblies in relation to thermal resistance, moisture control, and airtightness.*** ***Design approach to glazing systems.*** ***Apply building code requirements to non-combustible cladding and insulation.***
Construction Documents Practice Area	The working drawings phase of construction documents preparation constitutes the major activity on a project in an OAA member’s practice. Construction documents describe in graphic form all the essentials of the work to be done: location, size, arrangement, and details of the project. Since the successful and timely execution of these documents can be equated closely with an office’s financial success, OAA members constantly search for more efficient ways to produce construction documents. Regardless of the method of preparation, it is extremely important that the documents be accurate, consistent, complete, and understandable. This requires thorough quality control including constant review and crosschecking of all documents. In addition, effective coordination of consultants’ drawings is essential to avoid conflicts between the various trades during construction.

Competency 7: Evaluate bids submitted by contractors.

Practice Area: Procurement and Contract Award

Minimum Competency Level	**5 - Evaluate** "Evaluate" refers to the ability to make judgments based on criteria and standards. This includes detecting inconsistencies or fallacies within a process or project, determining whether conclusions follow from observed data, judging which of two methods is the correct way to solve a problem, and determining the quality of a solution based on required criteria.
Indicators	***Clarify the OAA member's responsibility to the client in making recommendations.*** ***Evaluate submitted tenders for technical compliance.*** ***Explain bid and performance bonds and their role in the tendering process.*** ***Prepare required post-tender addenda and contract award documents.***
Procurement Practice Area	The OAA practice assists in establishing and administering bidding procedures, issuing addenda, evaluating proposed substitutions, reviewing the qualifications of bidders, analyzing bids or negotiated proposals, and making recommendations for the selection of the contractor(s). The construction contract and related documents are the formal instruments that bind the major parties together in the construction phase. They detail the desired product and the services to be provided in its construction, as well as the consideration to be paid for the product and the services.

Competency 8: Administer appropriate forms and documents.

Practice Area: Construction Phase - Office

Minimum Competency Level	**5 - Evaluate** “Evaluate” refers to the ability to make judgments based on criteria and standards. This includes detecting inconsistencies or fallacies within a process or project, determining whether conclusions follow from observed data, judging which of two methods is the correct way to solve a problem, and determining the quality of a solution based on required criteria.
Indicators	***Prepare certificates for payment.*** ***Select and prepare contemplated/proposed changes, change directives, and change orders.*** ***Prepare other relevant forms or reports (field review, final review, etc.).*** ***Evaluate claims of substantial performance/completion.*** ***Appraise professional obligations relating to lien and other related legislation.*** ***Assess professional obligations related to letters of assurance/schedules (if applicable).***
Construction Phase Practice Area	During the construction phase, many tasks do not directly involve field observations. These include processing contractors’ applications for payment, preparing change orders, checking shop drawings and samples, adjudicating disputes, etc. The OAA member’s handling of these matters will usually have a direct impact on the smooth functioning of the work in the field. For example, prompt processing of the contractor’s application for payment, including review of any substantiating data that may be required by the contract documents, helps the contractor maintain an even flow of funds.

Items such as shop drawings, samples, and test reports submitted for the OAA member’s review must be acted on promptly to expedite the construction process. Changes in the work that may affect the time of construction or modify the cost are accomplished by change orders. Interpretations necessary for the proper execution of work must be given promptly in writing even when no change order is required.

Competency 9: Administer construction phase site tasks.

Practice Area: Construction Phase - Site

Minimum Competency Level	**4 - Analyze** "Analyze" refers to the ability to break down material into its constituent parts and determine how the parts relate to one another and/or to an overall structure or purpose. This may include the identification of the parts, analysis of the relationship between parts, and recognition of the organizational principles involved.
Indicators	***Administer tasks related to the construction phase on site (from initial construction meeting, through construction and close out, until end of the warranty period).*** ***Select procedures for monitoring construction progress.*** ***Administer tasks related to field review.*** ***Administer tasks related to contract closeout, takeover, and occupancy.*** ***Coordinate tasks related to hazardous materials.*** ***Understand the responsibilities of the contractor and the OAA member relative to site safety.*** ***Understand the responsibilities of the contractor with respect to environmental impacts during construction (waste management, sediment control, etc.)***
Construction Phase Practice Area	In administering the construction contract, the OAA member's function is to determine if the contractor's work generally conforms to the requirements of the contract documents. To evaluate the quality of material and workmanship, the OAA member must be thoroughly familiar with all the provisions of the construction contract.

Periodic reports on the stage of completion of scheduled activities are collected and compared to the overall project schedule at job site meetings. These meetings facilitate communication between the contract parties and produce a detailed progress record. The OAA member must determine through observation the date of substantial completion and receive all data, warranties, and releases required by the contract documents prior to final inspection and final payment.

In addition to these construction-related responsibilities, the OAA member interprets contract documents when disagreements occur and makes findings in regard to the dispute impartially, even when the client is involved. Dissatisfaction with the OAA member's decision can lead to arbitration or litigation.

Competency 10: Understand the role of a self-governing profession in contemporary society.

Practice Area: Professionalism and Practice

Minimum Competency Level	**2 - Understand** "Understand" refers to the ability to grasp the meaning of material. This may be shown by translating material from one form to another, interpreting material (explaining or summarizing), or estimating future trends (predicting consequences or effects). These learning outcomes go one step beyond simple remembering of material and represent the basic level of understanding.
Indicators	***Understand the relevance of the* Architects Act *and related documents.*** ***Understand the implications and obligations of a self-governing profession.*** ***Understand the legal, professional, and ethical obligations of an OAA member within a self-governing profession, including competency and conduct requirements.***
Professionalism Practice Area	Members of self-governing professions in Canada are granted exclusive rights of title and/or practice in return for commitments to meet professional obligations. These obligations include protection of the public interest first and foremost—above expectation of reward or gain. They also include commitments to maintain one's level of knowledge and learning throughout one's career and to act in accordance with prescribed codes of conduct. Every practitioner is expected to know the requirements of being a member of a self-governing profession and to understand the special obligations attached to their professional status.

Ontario Practice Competencies Self-Assessment Guide

As part of the OAA Technology Program (OTP), while Intern Technologists move through their internship, they are encouraged to review their Experience Record Book (ERB) submissions to determine if any activities are applicable to the key Ontario practice competencies submission. Tracking this information will facilitate the completion of the self-assessment when the time comes, which would typically be once the ERB is complete, and the individual is ready to make application for limited licence.

The OAA will complete the Experience Record Book (ERB) Summary section of the self-assessment. The final ERB Summary encapsulates all the experience recorded to the Intern Technologist's record book and forms part of the overall experience assessment submission. This section also serves as a reference for the Intern Technologist and Supervising Professional.

All 10 key competencies must be validated prior to application for limited licence. In the event an applicant is unable to successfully complete the Ontario practice competency requirement prior to application for limited licence, they may be required to attend an Experience Requirements Committee assessment interview.

PDF Submissions – Step by Step Process – Intern Technologist/Applicant and Supervising Professional

Intern Technologists/Applicants should review each of the required competencies to determine if their OTP work experience includes activities that demonstrate completion of each key competency. Refer to indicators and experience descriptions in this Guide and the OAA Technology Program Guide. The self-assessment should only be undertaken when the ERB experience can satisfy the requirements of the Ontario practice knowledge self-assessment.

The OAA accepts completed experience self assessment submissions validated and signed by the respective Supervising Professional via email to OAATechProg@oaa.on.ca. When ready, follow the steps below:

1. Contact the OAA to indicate you would like to complete the OTP experience self-assessment. The next steps include:
    - Confirmation of the Supervising Professional; and
    - Completion by the OAA of the Experience Record Book (ERB) Summary section of the submission, followed by the Association forwarding the PDF to the Intern Technologist for completion.
2. In accordance with the information provided in this Guide, review and check as complete each of the 10 key competencies.
3. Complete the self-assessment declaration. By checking the box in this section, you are confirming your experience activities demonstrate the minimum recommended competency levels for each of the Ontario practice competencies. Completion of this section is required in order to submit the form to the Supervising Professional for validation.
4. Once the above steps are complete, the form should be shared with your Supervising Professional. Supervising Professionals reviewing and validating the experience assessment should review or discuss the experience

record to ensure the information provided is accurate. **Individuals who successfully completed the OAA Technology Program requirements before May 10, 2023, are authorized to validate their own experience assessment. Individuals who complete the OAA Technology Program after May 10, 2023, must have their Supervising Professional validate the experience assessment.**

5. If the Supervising Professional agrees with the experience assessment, they will confirm by checking the box. This is a required field.
6. If the Supervising Professional agrees with the self-assessment, they will confirm this by checking the associated box. This is a required field.
7. Once the review is complete, the validation of the submission is finalized when the Supervising Professional signs and dates the form. This is a required field.
8. Upon validation, the completed form(s) should be emailed to the Association at OAATechProg@oaa.on.ca for processing.

OAA Review of Self-Assessment Submissions

The OAA relies on the Supervising Professional to review and validate the self-assessment submissions. The OAA review of submissions is undertaken to ensure the eligibility of the assessment in relation to the OAA Technology Program parameters and records. The OAA may accept or reject an Ontario practice competencies self-assessment if it does not comply. Each submission is assessed on a case-by-case basis and in accordance with the required competencies as set out in this Guide and the OAA Technology Program.
