



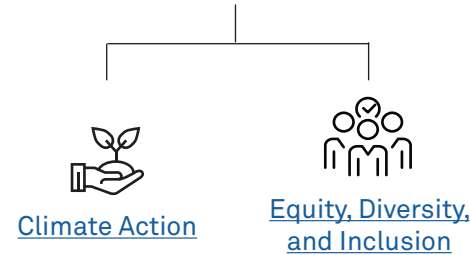
# VISION

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

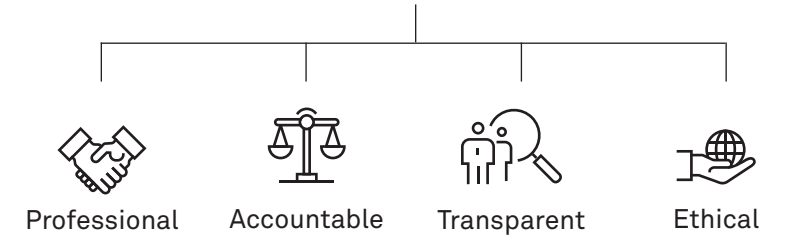
# MANDATE

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

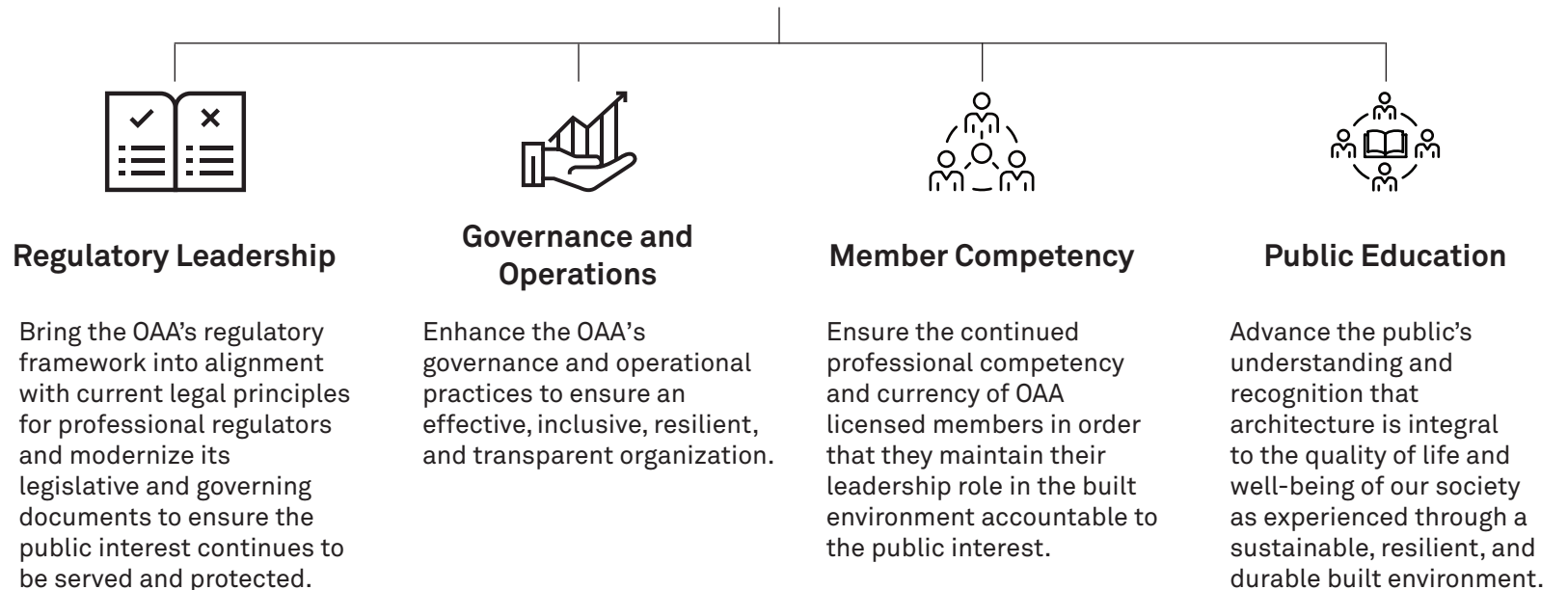
## Themes



## Values



## Strategic Priorities



### Regulatory Leadership

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

### Governance and Operations

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

### Member Competency

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

### Public Education

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



**Regulatory Leadership**

**Governance and Operations**

**Member Competency**

**Public Education**

**Goal Statements**

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

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

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

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

**Strategic Priorities**

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

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

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

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

**Metrics**

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

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

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

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

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## Operational Procedures

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

Issue Date **November 29, 2023**

Revision Dates

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Meetings of the Council of the Ontario Association of Architects (OAA) are conducted in accordance with Roberts Rules of Order which is included in the Councillor Orientation Manual, unless stipulated otherwise with the by-laws or as otherwise approved by OAA Council. The following operational procedures outline the rules and procedures for discussion, debate and motions within Council meetings:

- The maximum time for a Councillor's comments in debate on a motion is two minutes.
- The Chair shall keep a speakers' list of those wishing to speak to a specific item or motion; and
  - a) the speakers' list shall be built in the order that the Chair notes a Councillor's intention to speak by raising their hand; and
  - b) any Councillor having not spoken to an item/motion shall be given preference on the speakers' list over any Councillor who has already spoken.
- An original main motion may only be introduced at a meeting if it has been added under New Business to the agenda approved for that meeting. Otherwise all other motions are to be contained within the individual reports to Council, unless a motion for an item that is "*For Discussion*" has yet to be identified.
- An item *For Information Only* which no Council member indicates will be the subject of a question or an original main motion is considered to be dispensed upon approval of the agenda for that meeting.
- The meeting will move to a period of informal discussion immediately after a new item has been presented and a main motion on the item is introduced and any questions on the item have been put and answered, and
  - a) a period of informal discussion is defined as the opportunity to discuss an item with the motion on the floor; and
  - b) the Chair of the meeting when the item is introduced continues as the Chair during the period of informal discussion unless they choose to relinquish the Chair; and
  - c) in a period of informal discussion the regular rules of debate are suspended; and
  - d) a period of informal discussion ceases when the Chair notes that no additional members wish to speak to the item or when an incidental motion to return to the regular rules of debate passes with a majority; and
  - e) immediately upon leaving a period of informal discussion, Council will be asked to vote on the motion

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





## Open Council Agenda

5 mins	4.6	Recognition of Members of Long Standing ( <i>see attached</i> ) <i>It was moved by... and seconded by.... that the following Architects be recognized as Long Standing Members:</i> <i>Henry Scheffer      Moshe Safdie</i> <i>David W. Oleson      Y.M. Tadros</i> <i>Michael H.K. Wong</i>	Registrar
10 mins	4.7	Proposal from Ottawa Regional Society of Architects re. Structured Continuing Education Hours for Society Executives Participation ( <i>see attached</i> )	Executive Director
7 mins	4.8	Proposed Roster of Continuing Education for OAA Conference 2026 ( <i>see attached</i> ) <i>It was moved by Alkasawat and seconded by Paquette that Council approve the proposed roster of Continuing Education for the OAA Conference 2026 as recommended by the Continuing Education Advisory Committee subject to minor changes based on speaker availability and budget.</i>	Continuing Education Advisory Committee
7 mins	4.9	Council Policy – Society Finances ( <i>see attached</i> ) <i>It was moved by McKendrick and seconded by... that the policy for Society Finances be approved as presented to Council on November 28, 2025.</i>	SVP & Treasurer
5 mins	4.10	Society Special Project Funding – updated information and evaluation criteria ( <i>see attached</i> ) <i>It was moved by Speigel and seconded by Mintz that Council approve the recommendations of CPEC as presented in its report of November 14, 2025 to Council regarding the Society Funding Program, including the revised deadlines for submission, the proposed Guidelines for Society Project Funding Program, and Evaluation Criteria.</i>	VP Speigel
7 mins	4.11	Update to Practice Tip 23.2 - CCDC Construction Management Contracts ( <i>see attached</i> ) <i>It was moved by Yeung and seconded by .... That Council endorse the revised OAA Practice Tip PT.23.2 CCDC Construction Management Contracts as presented to Council on November 28, 2025.</i>	VP Yeung
	<b>5.0</b>	<b>ITEMS FOR DISCUSSION</b>	
	<b>6.0</b>	<b>REPORTS</b>	
1 min	6.1	Report from the President – Activities for the months of September-December ( <i>see attached</i> )	President
1 min	6.2	Report from the Executive Director ( <i>see attached</i> )	Executive Director
1 min	6.3	Report from the Registrar ( <i>see attached</i> )	Registrar
	6.4	Committee Reports	Committee Chairs
1 min	6.4.a	Communications & Public Education Committee – Update ( <i>see attached</i> )	VP Speigel
1 min	6.4.b	Governance & HR Committee - Update ( <i>see attached</i> )	SVP & Treasurer
1 min	6.4.c	OAA Building Committee- Update ( <i>see attached</i> )	SVP & Treasurer
1 min	6.4.d	Practice Resource Committee (PRC) – Update ( <i>see attached</i> )	VP Yeung
1 min	6.4.e	Policy Advisory Consultation Team (PACT) – Update ( <i>see attached</i> )	Immediate Past President
	<b>7.0</b>	<b>ITEMS FOR INFORMATION</b>	
	7.1	Regulatory Organizations of Architecture in Canada (ROAC) Administrator and Board Meetings – October 17-18, 2025 ( <i>see attached</i> )	Immediate Past President

7.2 Canadian Architectural Certification Board (CACB) Semi-annual Report (*see attached*)

7.3 Design Industry Advisory Committee (DIAC) 2024 Update (*see attached*)

## **8.0 OTHER BUSINESS**

## **9.0 DATE OF NEXT MEETING**

9.1 The next regular meeting of Council is Thursday January 22, 2026 at 9:30 a.m. at the OAA Headquarters, Toronto, Ontario.

The OAA Strategic Plan Review & Council Governance Workshop is scheduled following the Council meeting on Thursday January 22, 2026 3:00 p.m. – 6:00 p.m. and Friday January 23, 2026 9:00 a.m. – 3:00 p.m. at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario. It was noted that the session will be held in person only

## **10.0 ADJOURNMENT**

Ontario Association of Architects

Meeting #301 Open

MINUTES

September 18, 2025

The three hundred and first meeting of the Council of the Ontario Association of Architects, held under the *Architects Act*, took place on Thursday September 18, 2025 at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario and virtually via Zoom.

<b>Present:</b>	Ted Wilson	President
	Lara McKendrick	Senior Vice President and Treasurer
	Settimo Vilardi	Immediate Past President
	Susan Speigel	Vice President
	Thomas Yeung	Vice President
	Loloa Alkasawat	Councillor
	Donald Ardiel	Councillor
	J. William Birdsell	Councillor
	Natasha Krickhan	Councillor
	Jenny Lafrance	Councillor ( <i>virtual</i> )
	Michelle Longlade	Lieutenant Governor in Council Appointee ( <i>virtual</i> )
	Elaine Mintz	Lieutenant Governor in Council Appointee
	Deo Paquette	Councillor
	Anna Richter	Councillor
	Kristiana Schuhmann	Councillor
	Ted Watson	Councillor
	Marek Zawadzki	Councillor
	Kristi Doyle	Executive Director
	Christie Mills	Registrar
	Tina Carfa	Executive Assistant, Executive Services
<b>Regrets:</b>	Jim Butticci	Lieutenant Governor in Council Appointee
	Kimberly Fawcett-Smith	Lieutenant Governor in Council Appointee
<b>Guests:</b>	None	

The President called the meeting to order at 2:30 p.m.

The President noted that a land acknowledgement and recognition of the Indigenous land and its people is being shared with Council titled [Indigenous Voices on Reconciliation](#) Canadian Friends Service Committee (Quakers)

**DECLARATION RE CONFLICT OF INTEREST**

The President called for declaration of any conflicts of interest.

No conflicts of interest were declared.

**AGENDA APPROVAL**

9958. The President reported that there were no new items to be added to the agenda.

**It was moved by Speigel and seconded by McKendrick that the agenda for the September 18, 2025 open meeting be approved as circulated.**

-- CARRIED

**APPROVAL OF MINUTES**

9959. *Reference Material Reviewed:* Draft minutes of the June 19, 2025 Open Council meeting.

The draft minutes of the June 19, 2025 Open Council meeting were reviewed.

A member of Council suggested on page 2, paragraph 1 that the word "Fairness" be added to the reference to "Office of the... Commissioner".

**It was moved by Vilardi and seconded by Mintz that the minutes of the June 19, 2025 Open Council meeting be approved as amended.**

-- CARRIED

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

9960. There was no business arising from the minutes.

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

9961. *Reference Materials Reviewed:* 2026 Council Meeting dates. **(APPENDIX 'A')**

The Executive Director reported.

It was noted that the April 15 AGM date is a Wednesday and not Thursday as suggested in the attachment.

**It was moved by Vilardi and seconded by Spiegel that Council approve the 2026 Council meeting dates as amended.**

-- CARRIED

9962. *Reference Materials Reviewed:* Memorandum from Manager, Finance, Melanie Walsh dated September 4, 2025 re. Conference 2026 Program and Schedule and attached supporting documentation. **(APPENDIX 'B')**

The report was reviewed by Council. A typo was noted in the memo regarding the location of the Tapestry. That will be corrected moving forward.

**It was moved by Vilardi and seconded by Richter that the draft program and schedule for 2026 OAA Conference be approved, while recognizing elements may evolve as further planning takes place.**

-- CARRIED

9963. *Reference Materials Reviewed:* Memorandum from Vice President and Practice Resource Committee Chair, Thomas Yeung dated September 9, 2025 re. Updates to OAA-OGCA Document 100-2025 version and the withdrawal of the Guide to Project Close-out (dated November 2010) and attached supporting documentation. **(APPENDIX 'C')**

The Vice President reported.

**It was moved by Yeung and seconded by Richter that Council endorse the new OAA-OGCA Document No.100-2025 as presented to Council on September 18, 2025; and direct the withdrawal of OAA/OGCA Document No.100-2018 (as reissued 2019) and A Guide to Project Closeout Procedures (Dated November 2010).**

-- CARRIED

9964. *Reference Materials Reviewed:* Memorandum from Vice President and Practice Resource Committee Chair, Thomas Yeung dated September 9, 2025 re. OAA Document Maintenance – Practice Tips impacted by OBC 2024: Updates to Practice Tip PT.36.3 and attached supporting documentation. **(APPENDIX ‘D’)**

The Vice President reported

**It was moved by Yeung and seconded by Zawadzki that Council endorse the revised OAA Practice Tip PT.36.3 OBC SB-12 Energy Efficiency for Housing – Prescriptive Compliance as presented to Council on September 18, 2025.**

-- CARRIED

9965. *Reference Materials Reviewed:* Memorandum from Executive Director, Kristi Doyle and Chief Operating Officer, Kathy Armbrust dated July 28, 2025 re. AI Policy for users of OAA Technology and attached supporting documentation. **(APPENDIX ‘E’)**

The Executive Director reported. It was confirmed that the Policy applies to all staff, Councillors, committees and other volunteer members.

**It was moved by McKendrick and seconded by Schuhmann that Council approve the AI Usage Policy.**

-- CARRIED

9966. *Reference Materials Reviewed:* Memorandum from Registrar, Christie Mills dated August 27, 2025 re. Council Exemption Request Submissions and attached supporting documentation. **(APPENDIX ‘F’)**

The Registrar reported. There was some concern noted regarding the potential for confusion in terms of the scope of Council’s authority to approve exemption requests and other pathways to licensure. After discussion, the following motions were passed:

**It was moved by Richter and seconded by Vilardi that Council approve the Council Policy - Submission Guidelines for Exemption Request to Council as well as the updated Statutory Framework document subject to housekeeping amendments identified during the Council meeting.**

-- CARRIED

**It was moved by Vilardi and seconded by Spiegel that Council approve the sunseting of the existing Council Policy – Exemption Requests issue date January 11, 1996.**

-- CARRIED

## **ITEMS FOR DISCUSSION**

9967. There were no items for discussion.

## **EXECUTIVE COMMITTEE REPORTS**

9968. *Reference Material Reviewed:* President’s Activities for the months of June to September. **(APPENDIX ‘G’)**

A member of Council enquired as to how the recent society visits by the President have been received.

The President responded that the visits have been very positive with only a small group of recurring issues coming up such as local practice issues and procurements.

A Council member enquired whether there has been any feedback from members in terms of the amount of work and opportunities for the architectural profession. It was suggested that Pro-Demnity noted a drop in work in the industry.

The President responded that he has been receiving positive feedback from members on the availability of work and engagement by the profession in the industry.

The report was noted for information.

9969. *Reference Material Reviewed:* Report from Executive Director, Kristi Doyle dated September 18, 2025 re. Executive Director Report to Council. **(APPENDIX 'H')**

The report was noted for information.

9970. *Reference Material Reviewed:* Memorandum from Registrar, Christie Mills re. Office of the Registrar Statistical Report to Council – June 4, 2025 to September 3, 2025. **(APPENDIX 'I')**

The report was noted for information.

9971. *Reference Material Reviewed:* Memorandum from Senior Vice President and Treasurer, Lara McKendrick dated September 3, 2025 re. Unaudited Financial Statements for the Nine Months Ended August 31, 2025 and attached background information. **(APPENDIX 'J')**

The report was noted for information.

9972. *Reference Material Reviewed:* Memorandum from the Communications and Public Education Committee (CPEC) dated September 3, 2025 re. General Update from the Communications and Public Education Committee (CPEC) and attached background information. **(APPENDIX 'K')**

The report was noted for information.

9973. *Reference Material Reviewed:* Memorandum from Governance Committee dated September 4, 2025 re. Update from OAA Governance & HR Committee. **(APPENDIX 'L')**

The report was noted for information.

9974. *Reference Material Reviewed:* Memorandum from the OAA Building Committee dated August 7, 2025 re. Update from the OAA Building Committee. **(APPENDIX 'M')**

The report was noted for information.

9975. *Reference Material Reviewed:* Memorandum from Practice Resource Committee (PRC) dated September 9, 2025 re. Practice Resource Committee (PRC) Update. **(APPENDIX 'N')**

The report was noted for information.

9976. *Reference Material Reviewed:* Memorandum from Vice President, Susan Speigel dated September 8, 2025 re. Update on the Policy Advisory Coordination Team's (PACT) work. **(APPENDIX 'O')**

A member of Council encouraged Council to attend the Queen's Park Picks (QPP) on October 25 at 5:30 p.m. to assist in representing the profession.

The report was noted for information.

## ITEMS FOR INFORMATION

9977. *Reference Material Reviewed:* Memorandum from Manager, Finance, Melanie Walsh dated September 4, 2025 re. Debrief on Conference 2025 – Ottawa and attached supporting documentation. **(APPENDIX ‘P’)**

The report was noted for information.

## OTHER BUSINESS

9978. Reappointment of OAA Representative to the Committee for the Examination for Architect in Canada (CExAC) (*oral*)

Discussion on the candidate for reappointment was held in camera and the following motion was passed:

**It was moved by Speigel and seconded by Mintz that current CExAC Representative, Jeffrey Laberge be reappointed to CExAC for a three-year term effective January 1, 2026.**

-- CARRIED (12 in favour, 2 opposed, 1 abstention)

## DATE OF NEXT MEETING

9979. The next regular meeting of Council is Friday November 28, 2025 at 9:30 a.m. at the OAA Headquarters, 111 Moatfield Drive, Toronto, Ontario.

## ADJOURNMENT

9980. **It was moved by Schuhmann and seconded by Richter that the meeting be adjourned at 3:06 p.m.**

-- CARRIED UNANIMOUSLY

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President

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Date

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# 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 Speigel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 4.2

**From:** Kristi Doyle, Executive Director

**Date:** November 12, 2025

**Subject:** Amendment to OAA Bylaws, Schedule A

**Objective:** Council to review and approve proposed amendments to OAA Bylaws, Schedule A.

Upon Council's approval of the 2026 Annual Budget at the November 28 meeting, Schedule A to the Bylaws will need to be amended pursuant to the adopted budget. The changes to Schedule A reflect an increase of 1.25% to all membership and Certificate of Practice fees for 2026. In addition, other fees that relate to these annual membership fees and/or administration have also been updated to reflect this increase.

Schedule A has also been amended to include a \$500 application fee in accordance with the update Mutual Recognition Agreement between the National Council of Architectural Registration Boards and the Regulatory Organizations of Architecture in Canada.

As a reminder, the Bylaw Schedule A will come into force upon Council's approval however is subject to ratification at the next Annual General Meeting of Members.

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## Action

Council is asked to consider the following motion:

*It was moved by... and seconded by... that Schedule A to the OAA Bylaws be approved as presented to Council on November 28, 2025.*

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## Attachments

OAA Bylaws, Schedule A

OAA Bylaws, Schedule A, redlined



## SCHEDULE A OAA Bylaws Fees

### Licence and Limited Licence

On filing of application	\$337.00
On filing of re-application (by a person who previously resigned their membership)	\$184.00
On referral of application to the Experience Requirements Committee	\$306.00
On filing of application to Council for Exemption Pursuant to Section 33 of Regulation 27 R.R.O. 1990	\$552.00
On filing of application under mutual recognition agreement	\$500.00
On reinstatement	\$460.00
New Certificate	\$ 30.00

**Notes:**

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

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

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

<b>Architect</b>	\$1,023.00
<b>Licensed Technologist</b>	\$710.00
<b>Non-Practising Status</b>	\$511.50

**Notes:**

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

Payment received between March 1<sup>st</sup> and March 31<sup>st</sup> shall be subject to a late payment penalty of \$184.00

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

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

### Temporary Licence

On filing of application	\$ 490.00
On issue	\$2,533.00
On renewal	\$2,533.00

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

The following annual fees shall be payable:

<b>Retired Member</b>	\$76.00
<b>Student Associate</b>	No charge
<b>Intern Architect</b>	\$195.00
<b>Intern Architect with 5+ years Intern status</b>	\$1,023.00
<b>Intern Technologist</b>	\$195.00
<b>Student Technologist</b>	No Charge

Note:

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

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

### Certificate of Practice

#### Architect – Certificate of Practice

On filing of application	\$306.00
Annual Fees – based on the number of Architects and Licensed Technologists in the practice	
• practice with one Architect	\$522.00
• fee for each additional Architect within the practice add	\$391.00
• fee for each additional Licensed Technologist within the practice add	\$261.00

#### Licensed Technologist – Certificate of Practice

On filing of application	\$306.00
Annual Fees – based on the number of Licensed Technologists and Architects in the practice	
• practice with one Licensed Technologist	\$365.00
• fee for each additional Licensed Technologist within the practice or Architect add	\$261.00
On opening of an office other than the registered or principal office	\$123.00

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

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

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

On filing of application	\$ 490.00
On issue	\$4,432.00
On renewal	\$4,432.00

**Other – Certificate of Practice**

Change of Name	\$ 306.00
New Certificate	\$ 30.00

**Admission Course**

On application to attend the Admission Course	\$ 400.00
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**Canadian Experience Record Book and Experience Record Book – Late Submission**

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

For every 1000 hours or portion thereof	\$ 123.00
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**Members and Interns on Leave of Absence**

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

Where the leave of absence commences between the first day of January and the last day of February and no annual fee has been paid for the calendar year	\$ 76.00
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For a leave period that starts part of the way through the calendar year, where the full annual fee for the year has already been paid, the fees would be calculated to be consistent with the existing Council Refund Policy where the leave period starts as follows:

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

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

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

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

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

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

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

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

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

### **Administration Fees**

General Administration	\$ 61.00
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*Made by the Council of the Ontario Association of Architects on the 28<sup>th</sup> day of November 2025.*

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## SCHEDULE A OAA Bylaws Fees

### Licence and Limited Licence

On filing of application	\$337 <del>3</del> .00
On filing of re-application (by a person who previously resigned their membership)	\$184 <del>2</del> .00
On referral of application to the Experience Requirements Committee	\$306 <del>3</del> .00
On filing of application to Council for Exemption Pursuant to Section 33 of Regulation 27 R.R.O. 1990	\$5524 <del>5</del> .0
On filing of application under <del>mutal</del> mutual recognition agreement	\$500.00
On reinstatement	\$46054.0
New Certificate	\$ 30.00

Notes:

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

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

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

<b>Architect</b>	\$1,0234 <del>1</del> .
<b>Licensed Technologist</b>	\$710.00
<b>Non-Practising Status</b>	\$50551 <del>1</del> .50

Notes:

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

Payment received between March 1<sup>st</sup> and March 31<sup>st</sup> shall be subject to a late payment penalty of \$482.00184.00

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

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

#### Temporary Licence

On filing of application	\$ <del>490</del> 84.00
On issue	\$2,5 <del>33</del> 02.00
On renewal	\$2,5 <del>33</del> 02.00

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

The following annual fees shall be payable:

<b>Retired Member</b>	\$ <del>7</del> 65.00
<b>Student Associate</b>	No charge
<b>Intern Architect</b>	\$19 <del>5</del> 3.00
<b>Intern Architect with 5+ years Intern status</b>	\$1,0 <del>23</del> 44.00
<b>Intern Technologist</b>	\$19 <del>5</del> 3.00
<b>Student Technologist</b>	No Charge

Note:

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

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

#### Certificate of Practice

##### Architect – Certificate of Practice

On filing of application	\$30 <del>6</del> 3.00
Annual Fees – based on the number of Architects and Licensed Technologists in the practice	
<ul style="list-style-type: none"> <li>practice with one Architect</li> <li>fee for each additional Architect within the practice add</li> <li>fee for each additional Licensed Technologist within the practice add</li> </ul>	\$5 <del>22</del> 45.00 \$39 <del>1</del> 86.00 \$2 <del>57</del> -5061

##### Licensed Technologist – Certificate of Practice

On filing of application	\$30 <del>6</del> 3.00
Annual Fees – based on the number of Licensed Technologists and Architects in the practice	
<ul style="list-style-type: none"> <li>practice with one Licensed Technologist</li> <li>fee for each additional Licensed Technologist within the practice or Architect add</li> </ul>	\$365.00 \$2 <del>61</del> 57.50
On opening of an office other than the registered or principal office	\$12 <del>3</del> 4.00

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

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

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

On filing of application	\$ 49084.00
On issue	\$4,432378.00
On renewal	\$4,432378.00
<b>Other – Certificate of Practice</b>	
Change of Name	\$ 306.00
New Certificate	\$ 30.00

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#### Admission Course

On application to attend the Admission Course	\$ 400354.00
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#### Canadian Experience Record Book and Experience Record Book – Late Submission

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

For every 1000 hours or portion thereof	\$ 1243.00
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#### Members and Interns on Leave of Absence

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

Where the leave of absence commences between the first day of January and the last day of February and no annual fee has been paid for the calendar year	\$ 765.00
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For a leave period that starts part of the way through the calendar year, where the full annual fee for the year has already been paid, the fees would be calculated to be consistent with the existing Council Refund Policy where the leave period starts as follows:

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

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

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

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

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

---

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

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

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

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

### **Administration Fees**

General Administration	\$ 61.00
------------------------	----------

Made by the Council of the Ontario Association of Architects on the ~~23<sup>rd</sup>~~ 28<sup>th</sup> day of ~~January~~ November, 2025.

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# Memorandum

**To:** Council

William (Ted) Wilson  
Donald Ardiel  
Jim Butticci  
Natasha Krickhan  
Michelle Longlade  
Elaine Mintz  
Anna Richter  
Susan Speigel  
Edward (Ted) Watson  
Marek Zawadzki

Loloa Alkasawat  
J. William Birdsell  
Kimberly Fawcett-Smith  
Jenny Lafrance  
Lara McKendrick  
Deo Paquette  
Kristiana Schuhmann  
Settimo Vilardi  
Thomas Yeung

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 4.5

**From:** Christie Mills, Registrar

**Date:** November 12, 2025

**Subject:** Appointment of Life Members

**Objective:** To appoint individuals to Life Membership effective January 1, 2026

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## Background:

A Life Member is a Retired Member who reaches the age of 75 and is appointed as a Life Member by Council.

29. (1) A life member is a person who has resigned his or her membership in the Association, who has thereafter held the status of retired member and who is elected as a life member by the Council. O. Reg. 287/99, s. 9.

(2) A life member is entitled to receive general information issued by the Association and to attend the annual and general meetings of the members of the Association but is not entitled to vote at such a meeting. R.R.O. 1990, Reg. 27, s. 29 (2).

(3) A life member may use the title "architect (retired)" or "architecte (retraité)". R.R.O. 1990, Reg. 27, s. 29 (3); O. Reg. 44/05, s. 2; O. Reg. 386/15, s. 2.

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**Action:** Council is requested to consider and approve the following motion:

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

Erju Akman	Kevin J. McIlmurray
Moiz Behar	Victor Peter Pala
Dennis L. Bryan	Honorata P. Pienkowska-Roseman
Terrance Peter Christoff	Hanna E. Regehr

Joseph A. Colonna  
Peter Favot  
Stephen A. Finnamore  
Katherine M. Ginn  
Charles Ip  
Grazyna Krezel  
Philip Kwan  
Alka Lukatela  
Terence J. Mason

Brian Sickle  
Marc M. Silbert  
John B. Stark  
Gabriel M. Talasman  
Peter H.M. Tovell  
Kenneth W. Trevelyan  
Robert Gordon Webster  
Siu-man Wong

**Attachments:** none

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# 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  
November 28, 2025  
(open)  
ITEM: 4.6

**From:** Christie Mills, Registrar

**Date:** November 12, 2025

**Subject:** Recognition of Architects Long Standing

**Objective:** To inform Council of the individuals who are eligible for recognition as having been Architects with the Ontario Association of Architects for at least fifty years.

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## Background:

1. Council Policy approved January 9, 1997:

*“Council shall recognize, on an annual basis, all individuals who have been members of the Ontario Association of Architects for at least fifty years by way of letter and presentation of a certificate at the Annual General Meeting.”*

2. The following Architects have reached this milestone:

Henry Schefter	Architect since January 9, 1975
Moshe Safdie	Architect since April 10, 1975
David W. Oleson	Architect since May 8, 1975
Y.M. Tadros	Architect since September 11, 1975
Michael H.K. Wong	Architect since November 13, 1975

---

**Action:** Council is requested to consider the following motion:

*It was moved by... and seconded by.... that the following Architects be recognized as Long Standing Members:*

Henry Scheffer  
Moshe Safdie  
David W. Oleson  
Y.M. Tadros  
Michael H.K. Wong

**Attachments:** Council Policy – Members of Long Standing and Waiver of Annual Fees



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## Council Policy

Policy Name	<b>Members of Long Standing and Waiver of Annual Licence Fee for Members of Long Standing</b>
Issue Date	<b>January 1997</b>
Revision Dates	<b>March 9, 2006</b> <b>January 18, 2019</b>

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1. The following Council Policy was approved January 9, 1997:

“Council shall recognize, on an annual basis, all individuals who have been members of the Ontario Association of Architects for at least fifty years by way of letter and presentation of a certificate at the Annual General Meeting.”

2. Upon reaching the milestone of having held a licence with the Ontario Association of Architects for at least fifty years, a member will no longer be required to pay the annual licence fee as prescribed in the by-laws of the Association.
3. This Policy also extends to those members who have been previously recognized as a member of long standing and has taken “retired status”.

Note:

1. A member of long standing will be required to pay the annual Certificate of Practice Fees (if applicable)
2. A member of long standing is still required to complete and record the OAA Mandatory Continuing Education
3. This policy is not retroactive beyond 2006 annual licence fees.
4. The fifty-year time frame related to licensure need not be consecutive.

Reference:

1. *Schedule A to OAA Bylaws*

# 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 Speigel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 4.7

**From:** Kristi Doyle, Executive Director

**Date:** November 12, 2025

**Subject:** Ottawa Regional Society of Architects (ORSA) – Proposal re. Structured ConEd Hours for Society Executives Participation

**Objective:** Council to consider the attached proposal from ORSA to allow for structured ConEd hours for society executives participation.

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The attached proposal was received from ORSA Chair Christopher Moise earlier this year. Upon receipt, and following a discussion with Moise, it was agreed that the proposal may benefit from further discussion with the other local Society Chairs before advancing to Council. A meeting with the Society Chairs and Councillor liaisons occurred in September.

The following information is provided to Council to assist in their review and consideration of the proposal.

In accordance with Section 54 of Regulation 27 under the *Architects Act* every member shall meet the requirements of the Continuing Education program in each cycle. The number of hours is further defined by Council Policy:

Architects: 70 learning hours (25 Structured Hours + 45 Unstructured Hours)

Limited licence holder: 35 learning hours (12 Structured Hours + 23 Unstructured Hours)

Non-practising member: 35 learning hours (can be all unstructured learning)

## **Definition of Structured Learning under the OAA's Continuing Education Program**

*Structured learning hours" includes activities that are organized educational sessions offered by Education Providers, are a **minimum one hour in length, include a live question and answer period and/or assessment, and are supported by evidence of participation at the time the Learning hours are acquired.** Activities must constitute the following educational categories: in-person learning, distance education, and teaching. In-person learning includes attendance in lectures, college/university courses, Lunch & Learns, and participation in an eligible tour led by an OAA Local Architectural Society.*

### **Categories of Unstructured Learning**

**Committee Meetings:** *Attendance at meetings as a member of an organized group, the mandate/activities of which relate to the conduct of business or the practice of architecture. This may include OAA Committees, Task Groups, and Advisory Groups, professional organizations, community committees, **or Local Architectural Societies, but not service clubs. 25 hours per cycle***

**OAA Council Meetings:** *Attendance at OAA Council meetings. 30 hours per cycle*

**Discussion Groups:** *An organized group of individuals who have gathered to discuss a specific topic, matter, or issue that is intended to support or advance the practice of architecture by the participants. This may include a Lunch & Learn, focus group, guest speakers, facilitated discussion, and roundtables. 25 hours per cycle:*

### **National Context – Reciprocal Recognition of ConEd hours**

In the context of the agreement amongst the Canadian architectural regulators regarding mutual recognition of continuing education programs, the concept of providing structured hours for involvement in local society work at the executive level has been reviewed with the senior management at each of the Canadian architectural regulators. The general feedback respected that an individual regulator may choose activities that it wishes to recognize as structured learning.

In preparing the above information, I spoke with ORSA Chair Christopher Moise and agreed that this proposal does not necessarily reflect only the activities of ORSA and could be applicable to all the 14 local societies of architecture.

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### **Action**

Council is asked to review that attached proposal and consider approval.

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**Attachments**

*Ottawa Regional Society of Architects – Proposal re. Structured ConEd Hours for Society Executives Participation*

DRAFT

Ottawa Regional Society of Architects  
c/o Ontario Association of Architects  
111 Moatfield Drive  
Toronto, ON M3B 3L6  
April 5, 2025

To: Council of the Ontario Association of Architects  
Attn: OAA Staff Society Liaison

**Subject:** Proposal for Continuing Education Recognition for Society Executive Roles

Dear Members of Council,

On behalf of the Ottawa Regional Society of Architects (ORSA), we write to propose a new initiative aimed at strengthening our Society's leadership and long-term sustainability. As outlined in the February 2023 Local Architectural Society Handbook, Local Societies serve an essential role in furthering the objectives of the OAA, especially in supporting public awareness of architecture and fostering professional engagement at the regional level.

Despite our continued efforts, the Society faces two persistent challenges:

- Retaining active membership and participation year over year; and
- Recruiting volunteers for Executive and Committee positions, which traditionally rotate every two years.

To address this, we propose the creation of a Continuing Education incentive that recognizes the time and contributions of Society Executives as professional development. Specifically, we seek approval for an initiative that would grant up to 10 hours of structured Continuing Education (CE) over a two-year term to elected Executive and Committee members.

## Proposal Overview

- **Eligibility:** **Executive:** Chair, Vice-Chair, Treasurer, Secretary, Registrar and all committee Chairs (i.e. Events, Social, OAW, etc.).
- **Recognition Framework:** Hours would be awarded for CE-compliant activities such as mentoring, event organization, strategic planning, and public outreach—aligned with the OAA's CE Program criteria for structured learning (e.g., teaching, professional presentations, and leadership in architectural programming).
- **Documentation:** This program would be supported through internal activity logs and certificates of participation, to be coordinated by the Society Chair and verified by the OAA Staff Liaison.

- Succession Planning: Standing committee chairs (e.g., Ottawa Architecture Week, Events, Web/Social) would serve as part of a leadership pipeline, preparing for future Executive roles while also participating in CE-eligible activities.

## Strategic Alignment

This initiative reflects and advances several pillars of the OAA's 2022–2027 Strategic Plan:

- Member Competency – Recognizes real-world leadership, mentorship, and education efforts as part of structured professional development.
- Governance and Operations – Encourages resilient, forward-looking succession planning and smooth volunteer transitions.
- Public Education – Expands member-led programming that advances architectural literacy and civic participation.
- Equity, Diversity, and Inclusion (EDI) – Creates new pathways into leadership for emerging professionals by offering meaningful and measurable professional incentives.

## Our Request

We respectfully request the Council's consideration of the following:

1. Approval of this project granting up to 10 hours of structured CE credit to each eligible Society Executive (listed above).
2. Support and guidance from the OAA Continuing Education Committee on certificate documentation and compliance protocols.
3. Assessment of province-wide scalability.

We believe this program will enhance the vitality and effectiveness of Societies across Ontario while providing professional value to our volunteer leaders. We would welcome the opportunity to discuss this proposal in greater detail at the upcoming Conference and assist in developing a model for province-wide implementation.

Thank you for your consideration.

Sincerely,

Christopher Moise  
Chair, Ottawa Regional Society of Architects  
Email: ottawaurbanist@gmail.com  
Phone: 819-333-8681  
Website: [www.orsa.ca](http://www.orsa.ca)

## *Proposal for Continuing Education Recognition for Society Executive Roles* Ottawa Regional Society of Architects (ORSA)

### Addendum — Structured Learning Alignment & Interjurisdictional Recognition

## Purpose

To confirm that **all elected ORSA(Society) Executives/Committee Chairs** may claim up to **10 hours of Structured Learning** per two-year term through the **ordinary work of the Society**, by running that work under a light-touch **Leadership Practicum** format that satisfies the OAA's Structured Learning criteria (organized session, ≥1 hour, live Q&A/assessment, evidence of participation).

## Eligibility & Scope (Leadership Practicum Format)

Eligible roles: Chair, Vice-Chair, Treasurer, Secretary, Registrar, and Standing Committee Chairs (e.g., OAW, Events, Web/Social).

### Source of content — regular Society business:

Each Structured hour will be drawn **directly from the monthly agenda**, such as: regulatory/policy updates, event/program planning or debriefs, mentorship initiatives, ethics and risk reviews (e.g., procurement, conflicts), public outreach/communications, and governance items that affect practice.

### How it qualifies as Structured Learning:

ORSA will designate a **60-minute “Leadership Practicum” block** within or immediately adjacent to a regular Executive/Committee meeting that includes:

1. **1–3 learning objectives** tied to recognized practice domains (e.g., codes/regulation, professional practice, risk/ethics, project/office management, communications/public engagement);
2. **Live interaction** (round-table Q&A, a short poll, or a brief check-for-understanding); and
3. **Evidence of participation** (attendance record plus minutes capturing objectives, interaction, and key takeaways).

*When an Executive presents or leads a segment during this block, it may be recorded under the “teaching/presenting” Structured category.*

**Agenda boilerplate (for each meeting notice): Leadership Practicum (60 min)** — *Practice theme derived from agenda item:* [title] • **Objectives:** [1–3 bullets] • **Interaction:** [Q&A / poll / brief assessment].

**Note:** Routine Society business **outside** a designated practicum block is **not** claimed as Structured.

## Documentation & Quality Assurance (light, audit-ready)

- **Practicum agenda line** noting theme, objectives, start/end time ( $\geq 60$  min), and interaction method;
- **Attendance log** (sign-in or virtual attendance report);
- **Minutes snippet** (2–4 lines: theme, objectives, interaction, takeaways);
- **Annual Executive Structured Learning Certificate** summarizing each participant's practicum dates/titles/hours, signed by the ORSA Chair.

This satisfies OAA's requirements for organized sessions, interactivity, and **proof of participation** without requiring per-event certificates.

**Note:** Routine Society business **outside** a designated practicum block is **not** claimed as Structured. The practicum block ensures the ordinary work is conducted in a way that clearly meets the Structured Learning definition.

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## Interjurisdictional Recognition (Simple Work-Around)

To avoid cross-provincial issues, this includes the following member-centric accommodation:

**Members reporting to another regulator that does not recognize these hours as Structured may simply choose not to claim them for that jurisdiction and meet their Con-Ed requirements via other accepted activities.**

Certificates will note: "**Recognized as Structured Learning under the OAA Con-Ed Program;** members practising outside Ontario should confirm eligibility with their regulator."

## Appendix A — Leadership Practicum\* Format (Explanation)

### Purpose

To clarify how a **Leadership Practicum\*** enables ORSA's **ordinary executive/committee work** to qualify as **Structured Learning** under the OAA Continuing Education Program, thereby incentivizing architects to volunteer for these vital roles.

\*Note: This terminology is used in effort to align with existing OAA Con-Ed verbiage and isn't intended to indicate Society work outside their standard routines and obligations.

### One-Sentence Definition

A **60-minute, organized block** embedded in (or immediately adjacent to) a regular Executive/Committee meeting, built from a real agenda item, but framed with **clear learning objectives**, a **live interactive element**, and **basic documentation** (agenda line, attendance, minutes snippet).

### Why This Works

The practicum mirrors OAA's Structured Learning criteria by ensuring each claimed hour is:

- **Organized** (scheduled,  $\geq 60$  minutes, stated objectives);
- **Interactive** (Q&A, quick poll, round-table, or brief check-for-understanding);
- **Documented** (agenda line, attendance, and 2–4 line minutes capturing objectives, interaction, and takeaways).

### Who Is Eligible

Elected **Executives/Chairs** (Chair, Vice-Chair, Treasurer, Secretary, Registrar, and Standing Committee Chairs such as OAW, Events, Web/Social) may claim up to **10 Structured hours per two-year term**.

### Source of Content (Regular Society Business)

The **topic comes directly from the monthly agenda**, for example:

- Regulatory/policy updates and practice implications.
- Event/program planning or debriefs.
- Mentorship initiatives and volunteer management.
- Communications and public outreach.
- Governance items that affect practice or operations of the Society.

## Qualifying Criteria (Thumb-Rule Test)

A practicum block qualifies when it has:

1. **1–3 learning objectives** tied to recognized practice domains (codes/regulation, professional practice, risk/ethics, **project/office management, communications/public engagement**, governance affecting practice);
2. **Live interaction** (Q&A, poll, round-table, brief check-for-understanding);
3. **Evidence of participation** (agenda line + attendance + minutes snippet);
4. **Duration ≥ 60 minutes** as a discrete segment.

**Not eligible:** routine approvals/scheduling with no objectives or interaction, or general discussion outside the designated practicum block.

## Minimal Documentation (Audit-Ready, Low Admin)

- **Agenda line** noting theme, objectives, start/end time (≥60 min), and interaction method
- **Attendance log** (sign-in or virtual report)
- **Minutes snippet** (2–4 lines: theme, objectives, interaction, key takeaways)
- **Annual Executive Structured Learning Certificate** summarizing each participant's practicum dates/titles/hours, signed by the ORSA Chair

## Boilerplate You Can Paste into Any Agenda

**Leadership Practicum (60 min)** — *Practice theme derived from agenda item:* [title] • **Objectives:** [1–3 bullets] • **Interaction:** [Q&A / poll / brief assessment].

## Example Mappings (Ordinary → Practicum)

- **Regulatory Update → Practice Implications Session:** identify two actionable changes; Q&A + 1-question poll.
- **Event Debrief → Risk/Ethics & Communications Lessons:** extract three improvements; round-table.
- **Mentorship Planning → Teaching/Presenting Practice:** define success metrics and feedback loop; brief check-for-understanding.
- **Public Outreach Plan → Communications & Role Clarity:** craft key messages; Q&A.

## Recognition Statement

Hours earned are **recognized as Structured Learning under the OAA Continuing Education Program.**

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# Memorandum

**To:** Council

Settimo Tom Vilar  
Anna Richter  
J. William Birdsell  
Susan Speigel  
Edward (Ted) K. Watson  
Natasha H. Krickhan  
Kristiana Schuhmann  
Marek Zawadzki  
Jim Buttici  
Kimberly Fawcett-Smith  
Elaine Mintz  
Thomas Yeung  
William (Ted) Wilson

Loloa Alkasawat  
Deo Paquette  
Don Ardiel  
Jenny Lafrance  
Michelle Longlade  
Lara J. McKendrick

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 4.8

**From:** Continuing Education Advisory Committee

Loloa Alkasawat, Councillor  
Deo Paquette, Councillor  
Jenny Lafrance, Councillor

**Date:** November 19, 2025

**Subject:** Call for Presenters for the OAA Conference 2026.

**Objective:** For Council to consider approval of the continuing education sessions that are recommended for the OAA Conference 2026.

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## OAA Annual Conference - Call for Presenters

To ensure strong programming focused on the Conference theme. Next year's Conference will explore how collaboration thrives in the Grand Valley, with its mid-sized cities and architectural gems. The climate crisis, housing shortages, and anxieties around economies and supply chains mean the need for collaboration. In Ontario's Silicon Valley, the opportunities and challenges posed by AI, automation, and energy modelling will be explored.

The OAA collected proposals and recommendations from the industry experts, OAA Councillors, OAA committees, and allied stakeholders. We received more than 100 proposals.

All proposals were independently reviewed and assessed by the members of the Continuing Education Advisory Committee according to the following criteria:

- Educational value and learning outcomes of the presentation;
- Speakers' credentials, expertise, and public speaking skills;
- Relevance to the Conference theme, Collaboration Powering Innovation.
- Ensuring speakers and topics are aligned with the OAA's commitment to Equity, Diversity, and Inclusion, Climate Action, and to ongoing reconciliation with Indigenous communities.

Based on the Committees' assessments, the proposals were short-listed to 26 in-class sessions and 12 Experiential Learning to be recommended for the upcoming OAA Conference 2026

The Committee is submitting the short-list for Council approval to be offered at the OAA Conference 2026.

Refer to Appendix A for a recommended list of Continuing Education sessions.

It is noted that two Experiential Learning and one Session has been selected for Conference include speakers who are Council members, Kristiana Schuhmann and Ted Watson.

It is noted that OAA Continuing Education Lead, Ashley Ward is also working on the development of additional experiential learning opportunities that will be added to the program once finalized.

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**Action:**

*It was moved by Alkasawat and seconded by Paquette that Council approve the proposed roster of Continuing Education for the OAA Conference 2026 as recommended by the Continuing Education Advisory Committee subject to minor changes based on speaker availability and budget.*

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**Attachments:** OAA Conference 2026 Continuing Education Sessions proposed roster

## OAA Conference 2026 Continuing Education Sessions

1. **Opening Plenary- *Advancing Prefabrication and Deeply Affordable Sustainable Housing: Lessons from Beaverton Heights and King William Flats***, Daniel Ling; OAA, Architect AIBC, Architect AAA, SAA, AANB, NSAA, AAPEI, AIA, FRAIC, LEED AP ; Principal; Montgomery Sisam Architects; Kevin Hutchinson; M. Sc. Arch.; Principal; Montgomery Sisam Architects
2. **Thursday Plenary- *Waterloo Regional Health Network Collaboration with Indigenous Values Contributes to Well-Being***, Brian Porter, OAA, Principal Two Row Architect, Clifford Harvey; OAA, Joint VP Development; Waterloo Regional Health Network
3. **Closing Plenary- *Revitalizing Heritage through Adaptive Reuse in Waterloo***, Greg Piccini, OAA Architect AIBC, Studio Director, Martin Simmons Sweets Architects, Jason Martin, OAA, Partner, Martin Simmons Sweets Architects
4. *Rooted in Place: Architecture, Landscape, Ecology*, Michael Ormston-Holloway; OALA, CSLA, ASLA, ISA, CNLA; President + Principal - Landscape Architect
5. *AI Collaboration: Rethinking Design and Innovation*, Tim Fu, Director Studio Tim Fu LTD; Saina Abdollahzadeh; Architect RIBA ARB; Lead Architect, Studio Tim Fu (UK)
6. *Chief Leonard George Building - Integrated design process and innovation*, Achim Charisius; Architect AIBC, RAIC, Certified Passive House Designer; Associate Principal, GBL Architects
7. *Reforming*
8. *Eli's Place: Canada's first therapeutic healing farm*, Shary Adams; AIA, OAA, NCARB, EDAC; Healthcare Practice Area Leader; Gensler
9. *The Succession Playbook: Leadership, Investment, and Firm Value*, Elaine Pantel; CPA, Principal; Elaine Pantel Professional Corporation; Zenon Radewych; BTech (Architecture); Partner; WZMH Architects; Ari Bose; OAA, RAIC, AIA; Founding Partner and Chief Growth Officer; Bluwatr; Justin Young; Principal; Idea Workshop
10. *From Constraints to Community: Designing Harvest Village*, Richard Aubry; OAA, MRAIC; VP Design, Development & Construction; Redwood Properties Jonathan King; OAA, MRAIC, LEED AP; Principal; BNKC Architects Inc.; Vaughn Miler; Principal; BNKC Architects Inc.
11. *Designing for the Complete Student: Co-Creating Campuses*, Tarisha Dolyniuk; OAA, AIBC, AANB, SAA, ARIDO, IDIBC, NCIDQ, FRAIC, LEED AP, SCUP; Partner; MJMA Architecture & Design; Ted

- Watson; OAA, Architect AIBC, AAA, SAA, NSAA, FRAIC, International Assoc. AIA, SCUP, LEED AP; Partner; MJMA Architecture & Design
12. *Regenerative Placemaking: Rouge Visitor Centre, a Case Study*, Mahsa Majidian; M.Arch., OAA, MRAIC, LEED AP; Associate; Moriyama Teshima Architects; Maria Kordjamshidi; Ph.D., M. Arch., LEED AP, Fitwel Ambassador; Sustainability Project Manager; Salas O'Brien Canada Inc.
  13. *Warmer, Wetter, and Windier Future-Proofing Your Building Enclosure for a Changing Climate*, Jillian Burgess; RA, OAA, LEED AP; Technical Director / Associate Principal; RWDI
  14. *Beyond Compliance: How Inclusion is Shaping the Royal George*, Amanda Motyer; Architect, M.Arch, BAS Hons, OAA, MRAIC, RHFAC Professional; Director of Inclusivity & Specifications; Unity Design Studio; Michael Gallant; Architect, M.Arch, BA Hons, OAA, MRAIC, LEED AP, IPDA; Design Principal; Unity Design Studio
  15. *Resilient, Low-Carbon Homes: Regional Sourcing and Whole Life Carbon Strategies*, Juliette Cook; M.Arch; Co-founder; Ha/f Climate Design; Cameron MarcCarthy-Tilley; B.Eng., M.Eng., P.Eng. (ON); Senior Specialist in Housing Research at CMHC; Canada Mortgage Housing Corporation (CMHC)
  16. *Adaptive Reuse: From Office to Homes: The Loft (Calgary)*; Peter Schulz; Principle Architect, AAA, AIBC, MRAIC, RIBA, LEED AP; Principle; WalterFedy Architecture Inc.; Kyle Thorpe; Architect, AAA, OAA; Project Architect - Associate; WalterFedy Architecture Inc.
  17. *Embedding Nokia's new R&D campus into Ottawa's innovation ecosystem*, Duanne Render; GSAP, SACAP; Cities Studio Director, Senior Associate; Gensler; Sarah Taylor; NCIDQ; Work Studio Director, Senior Associate ; Gensler
  18. *Academic Buildings as Catalysts for Innovation*, Don Schmitt; OAA, NSAA, AAPEI, AAA, MAA, AIBC, NWTAA, AANB, AIA, SAA, FRAIC; Principal; Diamond Schmitt
  19. *North America's First Unencapsulated Mass-Timber Hospital*, Jeff Mosher ; Lic.Tech OAA, LEED AP BD+C, EDAC, CPHD; Associate Health Principal ; HDR Architecture Associates, Inc.; Harry Hayes; P.Eng; Structural Engineer ; BPA; Laura Sisson ; P.Eng ; Mechanical Engineer / Health Principal ; H.H. Angus & Associates;
  20. *The Urgency of Bird-Safe Building Design*, Mauro Javier Carreño Chao; Arq. M.Arch, OAA, MRAIC, LEED AP; Associate, Senior Architect; BDP Quadrangle (Quadrangle Architects Ltd); Brendon Samuels; PhD, MSc; Research associate; Fatal Light Awareness Program (FLAP) Canada
  21. *Preservation, Resilience and Net Zero Carbon: Library and Archives Canada Gatineau 2*, Mark Berest; B.Arch., B.E.S, B.A., OAA, MRAIC, LEED AP BD+C; Principal; B+H

22. *Build Now: Waterloo Region-2025 University East*, Ashleigh Crofts OAA, ABA Architects, Dobrina Encheva, OAA, ABA Architects, Philip Mills, Chief Executive Officer, Habitat for Humanity Waterloo Region, Scott Higgins, President HIP Developments
23. *55 Franklin – Innovative, Low-Carbon Strategies for Affordable Housing*, Andrew Bousfield; B.Arch, OAA, SAA, MRAIC, LEED AP; President, ABA Architects; Nadine Nandi; BAS, M.Arch, OAA, MRAIC, LEED Green Associate; Vice President, Architecture, ABA Architects; Dobrina Encheva; M.Arch, OAA, MRAIC, Architect, ABA Architects; Mike Maxwell; President, Maxwell Building Consultants
24. *From Renewal to Resilience: Decarbonizing Existing Buildings*, Drew Hauser HONS. VIS. ARTS., B.ARCH., OAA, AANB, NSAA, AIA (NY), FRAIC, CAHP; Director, Board Chair, mcCallumSather; David Riley P.Eng., PMP, LEED AP BD+C, CAHP; Principal, Mechanical Engineer, mcCallumSather; Nathalie Desrosiers B.Sc., M.Sc.A., Ph.D (c), RAIC IRP, APT, ICOMOS; Senior Heritage Lead, mcCallumSather; Carly Connor P.Eng., CAHP; Founder & CEO, Green Salvaged Materials Inc.
25. *Economy of Means*, Jon Neuert; OAA, FRAIC, CMA. CAHP; Principal; Baird Sampson Neuert Architects, part of the WF Group Inc; Partick Darby; P.Eng; Principal - Director Energy and Carbon Solutions, WF Group Inc., o/a WalterFedy
26. *Design Decisions on Trial: Lessons from Real Claims*, ProDemnity, Speakers TBD

### Experiential Learning

1. *The Lines We Draw*, Paul Backewich (Sketching Session), Paul Backewich, Senior Architect, Calnitsky Associates Architects
2. *Honeybees - The Original innovators: An Interactive Case Study of the U of G Honey Bee Research Centre*, Kristiana Schuhmann; OAA; OAA Councilor, Associate Director, Campus Planning & Asset Management; Corey Brown; OAA; Associate architect ; Moriyama Teshima Architects
3. *Unlocking the missing middle: collaborative solutions to the housing crisis*, Ryan Mounsey; MCIP, RPP; CEO; Urban Insights Inc. ; Laird Robertson, OAA; Founder (President and Creative Director); Neo Architecture Inc.; Ben Eby; Co-Founder and President. ; Spurline Developments Inc.; Melissa Durrell; CEO and Chief Strategist; Durrell Communications Inc.
4. *Collaboration in Action: Making Home at 97 Victoria*, Joe Mancini; Co-Founder & Director; The Working Centre; Elie Newman; OAA, MRAIC; Principal; BNKC Architects Inc.; Joe Bogdan,

Founder of BNKC and Principal Emeritus; Robert Davies, Principal, Montgomery Sisam Architects Inc

5. *Innovative Master Planning in a time of Change - An Interactive Case Study of the U of G Campus Master Plan*, Kristiana Schuhmann; OAA; Associate Director, Campus Planning & Asset Management; University of Guelph; Craig Applegath; BSc | BArch | MArchUD | PPOAA | Architect AIBC | NSAA | AIA | FRAIC | LEED® AP BD+C; FOUNDING PRINCIPAL; DIALOG
6. *Solar Carports in the Wild*, Patrick Boot; Product Manager; VCT Group; Brian Unrau; CPA CMA FCUIC; President; VCT Group
7. *Gaslight District Tour*, Jason Martin; OAA, MRAIC; Partner; Martin Simmons Sweers Architects Inc.; Scott Higgins; President; HIP Developments Inc.
8. *Collaboration and Innovation at Lazaridis Hall*, Don Schmitt; OAA, NSAA, AAPEI, AAA, MAA, AIBC, NWTAA, AANB, AIA, SAA, FRAIC; Principal; Diamond Schmitt
9. *Inside Math 4: A Tour of Sustainable Innovation*, Brian Rudy; B.E.S., B.Arch, OAA, NSAA, NLAA, AAA, AIBC, FRAIC; Partner / Architect; Moriyama Teshima Architects
10. *On the Path to Reconciliation: Culture, Community, and Place*, Anne McIlroy; B.Arch., FRAIC, FCIP, RPP Principal, Cofounder, Brook McIlroy; Danny Roy; M.Arch, MRAIC, MCIP, RPP; Associate, Intern Architect/Planner, Brook McIlroy; John L. Lewis; Director, Indigenous Faculty Relations at University of Toronto, University of Waterloo; Khatereh Baharikhoo; B.A., MUD, CSLA, OALA, IAP2, OPPI / CIP Candidate Member; Principal, Urban Designer and Landscape Architect, Brook McIlroy
11. *55 Franklin – Innovative, Low-Carbon Strategies for Affordable Housing*, Dobrina Encheva; M.Arch, OAA, MRAIC Architect, ABA Architects; Brent Smith; Architectural Project Manager, ABA Architects; Mike Maxwell; President, Maxwell Building Consultants
12. *Big Room, Big Results: IPD Collaboration in Action*, Chris Kailing; ARCHITECT OAA NSAA SAA AIA MRAIC NCARB; Principal, Group2 Architecture Interior Design Ltd.; Ryan Scott; Chief Procurement Officer | Financial Operations, The Corporation of the City of Kitchener; Arthur Winslow; National IPD Director, Colliers Project Leaders

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# 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 Speigel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 4.9

**From:** Lara Mckendrick, Senior Vice President & Treasurer

**Date:** November 12, 2025

**Subject:** Council Policy – Society Finances

**Objective:** Council to review and approve the Council Policy for Society Finances.

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Over the course of the last year, the OAA's Governance and Finance & Audit Committees have been reviewing specific aspects of the funding provided to the local societies by the OAA. In response to feedback from the Society Chairs, one of the components of those discussions was the need for greater clarity and guidance from the OAA regarding administration and management of finances by each Society, while still recognizing the variation in size, composition, and function of each of our 14 local societies.

As a result, the attached Policy re. Society Finances has been drafted. This new Policy and its attachments are intended as a supportive tool and provides a framework for budgeting, accounting, investing, and financial reporting and promote consistency and accountability in financial practices. This additional clarity and guidance should also help to address ongoing concerns raised by current and past Chairs regarding financial and legal risks.

The policy was developed with the assistance of OAA staff, legal counsel, and the OAA's auditors as well as input from the Governance and Finance & Audit Committees.

The draft document and accompanying templates/guidelines were also shared with the Society Chairs and Councillor liaisons for review and comment. The feedback was positive and a few minor tweaks to the policy were made in response.

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**Action**

Council is asked to consider the following motion:

*It was moved by McKendrick and seconded by... that the policy for Society Finances be approved as presented to Council on November 28, 2025.*

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**Attachments**

Council Policy – Society Finances and appendices



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## Council Policy - DRAFT

Policy Name            OAA Local Societies - Financial Policies  
Issue Date            [month DD, YYYY]  
Revision Dates        [include all revision dates or enter "N/A"]

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### Purpose

The purpose of this policy is to establish principles and protocols that govern how the Ontario Association of Architects (OAA) Local Architectural Societies ("Societies") will address specific aspects of their financial resources.

The following provides a framework for budgeting, accounting, investing, and financial reporting to promote consistency and accountability in financial practices across the Societies. As constituent organizations of the Association, the Societies are provided with clear and consistent protocols and financial policies to ensure a healthy financial environment as well as mitigate exposure to financial and legal risks.

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### Submission of an Annual Budget

A draft annual operating budget for the following fiscal year) shall be submitted by each Society for review by the OAA's Finance & Audit Committee. Submission of the draft budget to the OAA may coincide with the individual Society's own budget development process and timelines. Societies will establish a balanced budget, which may include a line allocation for special initiatives or contingency. Each Society will use the annual budget template provided by the OAA or one of a similar likeness that provides the same or similar information and detail.

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### Duties of the Treasurer

The Treasurer is an essential member of the Society Executive. The Treasurer is responsible for the Society's assets, administers the finances of the Society, and reports to the Officers of the Society. They must be prepared to provide a clear and concise statement of the Society's financial position at any time, upon request. The Treasurer shall:

- Establish a bank account in the name of the Society and arrange for the appropriate signing authorities and segregation of duties;
- Pay all accounts as authorized by the Officers of the Society;
- Keep a record of all assets and expenditures, including invoices and receipts;
- Review all assets and expenditures to ensure prudent and responsible use of Society funds;
- Prepare the annual statement of accounts (profit/loss statement) and balance sheet of the Society and provide such statements to the OAA by the prescribed deadline;
- Inform the Officers of the Society and the OAA of any situation that impacts the financial position of the Society;
- Ensure that all records are transferred in an orderly fashion to the next Treasurer;
- Register the Society for HST if the total amount of all revenues (before expenses) from the worldwide taxable

- supplies of all the organization's activities is \$50,000 or more in any single calendar quarter, OR in the last four consecutive calendar quarters.

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### **Monies held in reserve and annual surplus**

The Ontario Association of Architects is an incorporated not-for-profit organization, subject to government rules and regulations regarding how it may use any surplus funds. These same rules and regulations apply to Societies by extension.

Any surplus realized by a Society each year should be reflected on its balance sheet as cash and held by the Society in its bank account or other cash equivalents i.e. GICs, term deposits. A Society may allocate year-end surplus funds to a reserve fund which may be placed in short term financial instruments such as Guaranteed Investment Certificates (GIC) and/or Premium Investment Account (PIA). The Society must provide a clear statement of what these monies are being held for, which must be in line with the stated purpose of the Local Architectural Societies. Investment in long-term financial instruments and stocks is not permitted.

The amount that a Society may accumulate in reserve shall be in line with the appended Guidelines issued by the OAA's Finance & Audit Committee.

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### **Annual General Meeting**

Once a year, each Society must hold an Annual General Meeting (AGM) of the Members of the Society. During this meeting, the Officers of the Society must present the following to the Members of the Society:

- Financial report summarizing the financial activities of the Society during the previous fiscal year; and
- Report on the activities of the Society.

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### **Submission of Annual Report & Year-End Financial Statement**

Every year, Societies are required to submit an annual report on their activities to the OAA governing Council for their review. The report must be accompanied by a complete Society financial report, including the use of any Special Project Funding (SPF) received in that fiscal year (December 1 to November 30 each year). Societies will not be eligible for further Special Project Funding without the previous year's Annual Report including year-end financial statement.

Societies will use the templates provided by the OAA for Annual Reports and financial statements (or similar likenesses that contain the same information). Society Annual Reports will be posted on the OAA Website.

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### **Liability of Societies and the Association**

A Society may not bind the OAA or represent that it may bind the OAA; the Society may not incur any indebtedness on behalf of the OAA. Section 75 of the OAA Bylaws dictates:

*No officer, member or affiliate of a Society, nor any Society shall have any power or authority as such to contract in the name of the Association nor to assume any obligations on behalf of the Association and the Association shall have no liability with respect to any debts or obligations assumed or incurred by any Society.*

It is the responsibility of the Society Chair and/or Treasurer to advise the OAA immediately should an issue arise such that a Society incurs any debt beyond that which is part of its usual operation and administration.

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### **Policy Review & Updates**

This policy will be reviewed periodically by the OAA Finance & Audit Committee. Amendments are subject to Council approval.



Attachments:

Society Annual Budget Template  
Guideline for Establishment of a Reserve by a Society  
Society Annual Financial Report Template

Guideline for Signing Authorities & Segregation of Duties  
Society Annual Report Template



**ENTER SOCIETY NAME**

**Statement of Revenue and Expenses**

With Comparison of Prior Year End and Current Year to Date

	<b>BUDGET</b>		
	2024	2025	2026
<b>REVENUE</b>			
Membership Fees Collected via OAA	0	0	0
Membership Fees - other categories	0	0	0
Per Capita Funding from OAA	0	0	0
Revenue from Events	0	0	0
Revenue from Seminars	0	0	0
Special Project Funding Requests	0	0	0
Interest Income from Investments	0	0	0
Misc Fees	0	0	0
<b>Total Revenue</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>EXPENSES</b>			
<b><i>Meetings/Events</i></b>			
General Meetings	0	0	0
OAA Annual President's Society Visit	0	0	0
Events	0	0	0
Seminars	0	0	0
Total Event Expense	0	0	0
<b><i>Society Initiatives</i></b>			
Awards	0	0	0
Donations	0	0	0
Other	0	0	0
Total Society Initiatives	0	0	0
<b><i>Administrative Expenses</i></b>			
Admin Staff	0	0	0
Admin Staff Meeting	0	0	0
Bank Fees	0	0	0
Website/Social Media	0	0	0
General Expenses	0	0	0
Total Administrative Expenses	0	0	0
<b>Total Expenses</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Net Profit (Loss)</b>	<b>0</b>	<b>0</b>	<b>0</b>



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# Guidelines for Financial Signing Authorities and Segregation of Duties for Societies

Issued by: OAA Finance & Audit Committee

Issue Date [month DD, YYYY]

Revision Dates [include all revision dates or enter "N/A"]

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## Purpose of the Guidelines

These guidelines were developed to support OAA Local Architectural Society Executive Officers in establishing basic processes and safeguards critical to effective governance. As constituent organizations of the OAA, the 14 Societies can promote financial stability, ensure accountability, and effectively mitigate financial and legal risks by adopting and adhering to standard principles and practices in their routine operations.

These best practices are provided for reference so Societies may adopt clear and transparent protocols governing the appropriate signing authorities and segregation of duties. Given the diversity in Society size, activity level, volunteer base, and capacity, some items may not be applicable to all Societies. Variations are permitted to allow Societies to right-size core principles to their unique contexts.

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## Purpose of Signing Authorities and Segregation of Duties

The affairs of the Society are managed by the Officers of the Society, which consist of a Chair, a Vice-Chair, a Secretary, and a Treasurer. The Officers form the Executive Committee. The Local Architectural Society Handbook outlines the typical duties of each Officer. It is understood that smaller Societies may not have the volunteer resources available to operate with a full complement of Officers. At minimum, a Society must have **two Officers**—an elected Chair and Treasurer—to ensure that ***no single individual has sole control over financial or operational processes***.

The Executive Committee will establish clear signing authorities and implement segregation of duties. These checks and balances reduce the likelihood of errors or misconduct while fostering a secure, accountable, and responsible operating environment that supports sound decision-making and safeguards organizational integrity.

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## Key Steps to Implement Signing Authorities and Segregation of Duties

Building on the duties outlined in the Society Handbook, Officers will:

### 1. Identify Critical Functions and Roles

- **Assess Existing Processes:** Map out relevant processes appropriate to the Society—such as financial management, membership administration, event coordination, and handling of sensitive information.

- **Determine Critical Tasks:** Identify functions most vulnerable to fraud, errors, or misuse, especially those involving financial commitments or sensitive data.
- **Define Clear Roles:** Assign defined responsibilities for each relevant role (combining duties into a single role when required), ensuring that no individual has control over all phases of a critical process.

## 2. Establish Segregation of Duties

- **Distribute Responsibilities:** Allocate tasks to different individuals to prevent conflicts of interest and reduce the risk of unauthorized activities.
- **Create Approval Hierarchies:** Where possible, introduce layered approval mechanisms for significant actions and transactions, requiring review and sign-off from more than one party.
- **Restrict System Access:** Implement role-based access controls to ensure users can only access systems and data relevant to their responsibilities (example: access codes or passwords).

**NOTE:** Smaller Societies may wish to **cross-train staff and volunteers** in multiple functions to enable temporary task reassignments, which can help ensure periodic review and reduce the risk of fraud or collusion. When possible, **engage volunteers with previous financial or governance experience** to provide additional oversight and help maintain appropriate segregation of duties.

Examples of Effective Segregation of Duties:

- **Purchasing and Payment:** The individual initiating a purchase request should not be the same person approving or processing the payment.
- **Financial Transactions:** The person initiating a financial transaction should not be the same person reconciling or reviewing it.

## 3. Implement Internal Controls

- **Document Policies and Procedures:** Write down procedures and define responsibilities, approval workflows, and escalation paths for all key functions.
- **Establish Documented Transaction Trails:** Create clear processes to track all transactions and user activities to promote transparency and support future audits. For example, maintain a general ledger log that captures all journal entries related to fee collections for the fiscal year. *Keep all records up to date.*
- **Leverage Technology:** Where available, consider automated controls—such as system-enforced dual approvals and access limitations—to reduce manual errors and enforce compliance.

## 4. Ongoing Monitoring and Review

- **Conduct Regular Audits:** Perform internal or external audits periodically to ensure policies are being followed and that duty segregation remains effective.
- **Review Access Rights:** Periodically assess and adjust system permissions to prevent accumulation of excessive or outdated access rights.
- **Volunteer and Staff Training:** Educate new and existing Society Officers on the importance of segregation of duties, their responsibilities within the framework, and how to report irregularities.

**NOTE:** Smaller Societies can introduce **periodic financial reviews** through a regular reconciliation exercise or implementing independent approvals as alternative oversight mechanisms.



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## Benefits of Defining Signing Authorities

- Clearly defined signing authorities clarify who is authorized to bind the society to financial or legal obligations promoting enhanced **accountability and transparency**.
- Restricting signing authority **mitigates the risk of unauthorized actions**, decisions, or transactions that could negatively impact the Society.
- Ensuring that only authorized individuals execute legal documents supports **legal and regulatory compliance**, reducing the risk of legal exposure.

## Benefits of Segregation of Duties

- Distributing key responsibilities among multiple individuals is a **fraud prevention** strategy that reduces the opportunity for any one person to manipulate a process for personal gain or conceal fraudulent activity.
- Dividing tasks enables a secondary review of work and fosters early **error detection and reduction** before significant negative impacts occur.
- Defining and distinguishing roles allows individuals to focus on specialized tasks, promoting greater accuracy, productivity, and overall **operational efficiency**.
- Ensuring critical activities are subject to review by more than one person **improves oversight and governance** and reinforces a culture of transparency and responsibility.
- Adding internal controls helps **protect the society's assets, reputation, and long-term viability**.

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## Guideline Review & Updates

This Guideline will be reviewed periodically by the OAA Finance & Audit Committee.



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## Guidelines for the Establishment of Reserves by a Society

Issued by: OAA Finance & Audit Committee

Issue Date[month DD, YYYY]

Revision Dates[include all revision dates or enter "N/A"]

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### Purpose of the Guidelines

These guidelines were developed to support OAA Local Architectural Society Executive Officers in establishing basic processes and safeguards critical to effective financial management. As constituent organizations of the OAA, the 14 Societies can promote financial stability, ensure accountability, and effectively mitigate financial and legal risks by adopting and adhering to standard principles and practices in their routine operations.

These best practices are provided for reference so Societies may adopt clear and transparent protocols governing the establishment, management, and maintenance of Reserve Funds.

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### Purpose of a Reserve Fund

Under the Accounting Standards for Not-For-Profit Organizations (ASNPO), a "Reserve" refers to a portion of an organization or groups net assets that has been set aside for specific or general purposes. Reserve funds offer financial stability, helping organizations prepare for expected or unexpected expenses. Reserves can be categorized as:

- **Unrestricted Reserves:** Funds without any formal policy governing their use.
- **Restricted Reserves:** Funds designated for specific uses, guided by either internal governance policies or external restrictions.

It is an organization's responsibility to establish clear, transparent policies on the accumulation and purpose of these reserves to ensure accountability to its membership.

The Canada Revenue Agency's (CRA) emphasizes the importance of having a *reasonable policy or intention* for holding reserves. While the commonly accepted benchmark has been 6–12 months of operating costs, CRA acknowledges that higher amounts may be appropriate based on future planning and organizational needs. Each Society must carefully consider its needs and allocate any surplus funds to reserves accordingly.

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### Types of Restricted Reserves

Examples of restricted reserves the Society may establish include:

- **Operating Reserves:** Typically 6–12 months of recurring operating expenses such as meetings, administrative costs, and supplies.
- **Special Program Reserves:** Set aside for planned initiatives such as special programs or events, as well as special community outreach programs.

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## Steps to Creating a Reserve Policy

As per the [OAA Local Architectural Society Financial Policies](#), Societies may allocate year-end surplus funds to a reserve fund which may be placed in short term financial instruments such as Flexible Guaranteed Investment Certificates (GIC), Premium Investment Accounts (PIA), or a basic savings account. The Society must provide a clear statement of what these monies are being held for, which must be in line with the stated purpose of the Local Architectural Societies. Investment in long-term financial instruments and stocks is not permitted.

To ensure sound financial management, the following steps are recommended in developing a Reserve Policy:

1. **Discuss Long-Term Goals:** Align reserve planning with the Society's mandate and objectives.
2. **Assess Risk:** Identify potential risks to the Society's sustainability and associated financial impacts.
3. **Identify Reserve Needs:** Determine the types of reserve needed (e.g., Unrestricted, Restricted Operating, Restricted Special Program).
4. **Set Reserve Levels:** Define target amounts and the method for funding each reserve.
5. **Establish Approval Process:** Outline governance for accessing and using reserve funds.
6. **Submit Policy for Review:** Provide the finalized Reserve Policy to the OAA for review and approval.

The OAA Manager of Finance is available to respond to questions or discuss the development of a Reserve Policy by a Society.

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## Guideline Review & Updates

This Guideline will be reviewed periodically by the OAA Finance & Audit Committee.



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# Local Society Annual Reports

## Template Table of Contents

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The following offers a guideline for Societies in structuring their Annual Reports. This template Table of Contents offers some basic information that would be helpful for Societies to share with the OAA or others who may be interested in an overview of Society activities (ie. potential sponsors, partners, volunteers, etc).

Societies are only expected to include information relevant to them – *anything that does not apply to your Society can be omitted*. Societies may also wish include additional information that they deem relevant.

TIP: Free programs like Canva ([www.canva.com](http://www.canva.com)) can help Societies quickly create a polished, well-designed document.

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## About your Society

Quick “about” statement

## Words from the Society Chair/Executive Committee

A quick recap from Society leadership summarizing the main activities from the year.

## Volunteer Recognition

- Key volunteers (names)
- Volunteer numbers

## Key Statistics

- Total Membership number + breakdown
  - Architects
  - Students
  - Intern architects
  - Affiliates
- Communications/outreach efforts
  - Newsletters sent
  - Social media follows
  - Number of events hosted + attendance
  - ConEd hours offered + attendance
  - Any media coverage

## **Summary of Major Activities/Initiatives (include dates and supporting images if desired)**

- Special member meetings
- Signature events
- Special events
- Special programming
- Special outreach

## **Funding Recognition (if applicable)**

- OAA Special Project/Programming Funding
- Sponsorships
- Other supporters

## **Looking Ahead (optional)**

If there are any items that are on the horizon that the Society would like to mention.

## **Financial Summary (attached)**

(use sample template or create your own with similar information)

(optional) Provide a written overview/interpretive notes, if applicable.



**ENTER SOCIETY NAME**

**Balance Sheet**

Twelve Months Ended December 31, 2025

	2024	2025
<b>ASSETS</b>		
Petty Cash	0	0
Cash	0	0
Investments		
Account Receivable	0	0
<b>Total Assets</b>	<u>0</u>	<u>0</u>
<b>LIABILITIES</b>		
Accounts Payable	0	0
<i>Total Liabilities</i>	0	0
<b>EQUITY</b>		
Retained Earnings	0	0
<i>Total Members Equity</i>	0	0
<b>Total Liabilities &amp; Equity</b>	<u>0</u>	<u>0</u>

**ENTER SOCIETY NAME**

**Statement of Revenue and Expenses**

Twelve Months Ended December 31, 2025

	2025	2026
<b>REVENUE</b>		
Membership Fees Collected via OAA	0	0
Membership Fees Collected - Other		
Per Capita Funding from OAA	0	0
Revenue from Events	0	0
Revenue from Seminars	0	0
Special Project Funding Requests	0	0
Interest Income from Investments	0	0
Misc Fees	0	0
<b>Total Revenue</b>	<b>0</b>	<b>0</b>
<b>EXPENSES</b>		
<b><i>Meetings/Events</i></b>		
General Meetings	0	0
OAA Annual President's Society Visit	0	0
Events	0	0
Seminars	0	0
<b>Total Event Expense</b>	<b>0</b>	<b>0</b>
<b><i>Society Initiatives</i></b>		
Awards	0	0
Donations	0	0
Other	0	0
<b>Total Society Initiatives</b>	<b>0</b>	<b>0</b>
<b><i>Administrative Expenses</i></b>		
Admin Staff	0	0
Admin Staff Meeting	0	0
Bank Fees	0	0
Website/Social Media	0	0
General Expenses	0	0
<b>Total Administrative Expenses</b>	<b>0</b>	<b>0</b>
<b>Total Expenses</b>	<b>0</b>	<b>0</b>
<b>Net Profit (Loss)</b>	<b>0</b>	<b>0</b>

# 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  
 November 28, 2025  
 (open)  
 ITEM: 4.10

**From:** Communications and Public Education Committee (CPEC)

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

**Date:** November 14, 2025

**Subject:** Updates to Project Funding Program for Local Societies

**Objective:** To have Council review and approve the guidelines and evaluation criteria for Society Project Funding program.

## Background

Located in 14 communities across Ontario, the **Local Architectural Societies** are the regional chapters of the OAA, providing opportunities for dialogue between the OAA, local members of the architecture profession, and the public. The Societies are the Association’s key partners and collaborators who can work effectively within their communities to raise the awareness, appreciation, and understanding of architecture.

As such, **the OAA provides dedicated funds to the Societies to carry out special projects, programs, or events that further the OAA’s secondary object to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences**, where such initiatives cannot be covered by the Society’s current assets.

Under their Terms of Reference, CPEC has been entrusted by Council to review and evaluate funding applications from the Local Societies. Over that time, the Committee’s evaluation criteria has evolved in response to shifting Committee composition its Terms of Reference, and the OAA’s strategic priorities.

In response to growing interest from Societies coupled with requests to have greater clarity around eligibility and evaluation criteria, the Committee reviewed and considered areas of possible improvement to the application, administration, and evaluation processes of the funding program for Local Society projects.

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## Updates and Expanded Guidelines

Taking cues from recent improvements to the OAA Public Awareness Funding program, the Committee focused on improving **transparency, predictability, effectiveness, and clarity** for Society applicants and Committee evaluators alike. A key goal is to ensure that a broad range of both public- and profession-focused projects would be captured by the program.

In particular, CPEC proposes to update and expand upon the materials currently on the OAA website at <https://oaa.on.ca/connect/local-architectural-societies/resources-for-societies>. As such, the Committee has created a set of clear **funding guidelines** for Society use, which include:

- A revised name for greater clarity of purpose (from *Special Project Funding* to **Society Project Funding**);
- Later **funding submission deadlines** so Societies have more time to submit their required Annual Reports in advance;
- Distinct **requirements for requests above \$5000** (ie. full budget and project timeline);
- Updating the application format to **Microsoft Forms online** for easier submission and review;
- Articulating clear **eligibility criteria**, including which projects will **not** be eligible;
- Publishing **evaluation criteria** that have historically only been implied/internally understood; and
- Publishing an expected **timeline**.

An accompanying standardized **evaluation rubric** is also proposed for internal Committee member use to promote greater consistency.

The guidelines would be made available to all Local Societies on the OAA website and in the Society Handbook for use when creating funding applications. The hope is that the revisions will provide Societies with even greater opportunities to avail themselves of OAA funding support to carry out their important work in communities across the province. These updates are available in the attached "Guidelines" document. A marked up copy is also included for reference.

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## Action

Council is asked to consider the following motion:

*It was moved by Speigel and seconded by Mintz that Council approve the recommendations of CPEC as presented in its report of November 14, 2025 to Council regarding the Society Funding Program, including the revised deadlines for submission, the proposed Guidelines for Society Project Funding Program, and Evaluation Criteria.*

**Attachments**

GUIDELINES for Society Project Funding Program.docx

MARKED UP - Revisions to SPF Program.docx

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# Guidelines for Society Project Funding Program

October 2025

Located in 14 communities across Ontario, the **Local Architectural Societies** are the regional chapters of the OAA, providing opportunities for dialogue between the OAA, local members of the architecture profession, and the public. The Societies are the Association's key partners and collaborators who can work effectively within their communities to raise the awareness, appreciation, and understanding of architecture. As such, the OAA provides dedicated funds to the Societies to support them in delivering this work.

The **Society Project Funding** program, evaluated by the OAA [Communications and Public Education Committee \(CPEC\)](#), **is awarded to carry out special projects, programs, or events that further the OAA's objective to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences, where such initiatives cannot be covered by the Society's current assets.**

There are two streams within this funding program: **one-time** and **three-year recurring**.

## **Society Project Funding - One-Time**

Total of **\$76,000 available\***, released semi-annually in batches of **\$38,000** to carry out one-time projects/events:

*\*subject to annual Council approval*

## **Society Project Funding - Three-Year Recurring**

An additional **\$25,000 available annually** to support longer term programming and/or capacity-building activities (**maximum three-year term**).

## How to Apply for Society Project Funding

Interested Societies are asked to complete an [application form](#) detailing:

- the requested amount;
- statement of need;
- project goals;
- action plan;
- expected impact;
- budget (for requests above \$5,000); and
- (optional) supplementary materials for consideration.

## Eligibility

The Committee will consider a variety of projects that align with the OAA's values and demonstrate the potential to advance Society engagement with both public and professional communities.

Funds can be used toward **upcoming** projects and initiatives such as (but not limited to):

- community events;
- lectures;
- workshops;
- exhibitions;
- day camps;
- architecture tours;
- select administrative resources for Societies;
- innovative learning tools; and/or
- local scholarships.

Funds can **not** be used for:

- projects that have already happened;
- projects outside Ontario;
- projects that are primarily commercial or for-profit in nature;
- projects that can be funded by existing unused Society assets;
- projects contrary to the OAA's [vision, mandate, and values](#);
- projects contrary to the OAA's [Conflict of Interest Policy](#);
- illegal activities, harmful activities, or activities contrary to the Ontario Human Rights Code; or
- projects motivated primarily by a personal or political agenda.

**Society's must submit their Annual Report by [date to be determined] of the award year in order to be eligible.**

## Evaluation

The OAA's [Communications and Public Education Committee \(CPEC\)](#) will evaluate submissions using these **four key criteria**:

- The project clearly **furtheres the OAA's objective to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences**;
- There is **demonstrated need and relevance**;
- The project's **feasibility and likelihood of success**; and
- The project's **potential impact**.

*Please Note:*

- Priority will be given to projects that address the OAA's key strategic themes of **climate action and equity, diversity, inclusion, and Reconciliation**
- If a Society is requesting funding for an initiative that involves **an agreement or contract with a third party, that agreement must also be provided to the OAA in advance**.

## Timeline

### Submissions Due Mid-March Annually

- **Next deadline: Monday, March 16, 2026**
- **Total Available = \$38,000 (one-time) + \$25,000 (recurring)**
- APRIL: CPEC reviews and approves funding requests
- APRIL-MAY: decisions are communicated to applicants
- MAY: funding issued to successful applicants

### Submissions due Mid-September Annually

- **Next deadline: Monday, September 14, 2026**
- **Total Available = \$38,000 (one-time) + remaining funding from March (one-time and recurring)**
- OCTOBER: CPEC reviews and approves funding requests
- OCTOBER-NOVEMBER: decisions are communicated to applicants
- NOVEMBER: funding issued to successful applicants

**NOTE:** Any Society Project Funding must be used within one year of the request being received and must be accounted for the following year's Society Annual Report.

Please direct any questions, comments, or concerns to the OAA Public Outreach Specialist at [CynthiaM@oaa.on.ca](mailto:CynthiaM@oaa.on.ca). If you would like to submit a proposal for consideration, please use the designated form (linked below) or forward your answers to the questions therein in PDF format directly to [CynthiaM@oaa.on.ca](mailto:CynthiaM@oaa.on.ca) by the deadlines outlined above.

## APPLY NOW

[FOR COMMITTEE USE ONLY – criteria reflected in application]

### Project Evaluation Rubric

Criteria	Score (1-5)
General quality of application	
Clearly <b>furtheres the OAA's objective to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences</b>	
Demonstrated need and relevance	
Feasibility and likelihood of success	
Potential impact	
<i>Priority:</i> Climate Action	
<i>Priority:</i> Equity, Diversity, Inclusion, and Reconciliation	
<b>Total Points</b>	

## Special Guidelines for Society Project Funding Program - Revised

(from <https://oaa.on.ca/connect/local-architectural-societies/resources-for-societies>)2025

**Commented [CM1]:** Change name to be more clear about who and what the funding is for

Located in 14 communities across Ontario, the **Local Architectural Societies** are the regional chapters of the OAA, providing opportunities for dialogue between the OAA, local members of the architecture profession, and the public. The Societies are the Association's key partners and collaborators who can work effectively within their communities to raise the awareness, appreciation, and understanding of architecture. As such, the OAA provides dedicated funds to the Societies to support them in delivering this work.

The Society Special Project Funding (SPF) program, ~~coordinated~~ evaluated by the OAA Communications and Public Education Committee (CPEC), is awarded to carry out special projects, programs, or events that further the OAA's objective to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences, where such initiatives cannot be covered by the Society's current assets. is intended for the Local Architecture Societies. It is awarded to carry out special projects or events (i.e. not continuous initiatives) that cannot be covered by current assets of a Local Society, and further the OAA's objective to establish classes, schools, exhibitions, or lectures in, and promote public appreciation of, architecture and the allied arts and sciences. It requires submission of an Annual Report in early January each year.

**Commented [CM2]:** Specifies the secondary object from the Act

There are two streams within this funding program: **one-time** and **three-year recurring**.

### Society Project Funding - One-Time

Total of **\$76,000** available, released semi-annually in batches of **\$38,000** to carry out **one-time projects/events**.

### Society Project Funding - Three-Year Recurring

An additional **\$25,000** available annually to support **longer term programming** and/or **capacity-building** activities (maximum three-year term).

### How to Apply for Society Project Funding

Interested Societies are asked to complete an application form detailing:

- the requested amount;
- statement of need;
- project goals;
- action plan;
- expected impact;
- budget (for requests above **\$5,000**); and

**Commented [CM3]:** Make steps clear

**Commented [CM4]:** Only require a detailed budget for asks above \$5000 to reduce administrative burden for smaller societies/smaller projects

- (optional) supplementary materials for consideration.

### Eligibility

The Committee will consider a variety of projects that align with the OAA's values and demonstrate the potential to advance Society engagement with both public and professional communities.

Funds can be used toward **upcoming** projects and initiatives such as (but not limited to):

- community events;
- lectures;
- workshops;
- exhibitions;
- day camps;
- architecture tours;
- innovative learning tools; and/or
- local scholarships.

**Commented [CM5]:** Transparent eligibility criteria added

Funds can **not** be used for:

- projects that have already happened;
- projects outside Ontario;
- commercial or for-profit projects;
- projects that can be funded by existing unused Society assets;
- projects contrary to the OAA's vision, mandate, and values;
- projects contrary to the OAA's Conflict of Interest Policy;
- illegal activities, harmful activities, or activities contrary to the Ontario Human Rights Code; or
- projects motivated primarily by a personal or political agenda.

**Society's must submit their Annual Report by [date to be determined] of the award year in order to be eligible.**

#### **Deadline 1: Friday, January 31, 2025**

Applications will be reviewed in February by CPEC against the criteria and requirements. If funding is granted, the decision will be communicated to the Society by the end of March. For 2025, OAA Council had budgeted a total of \$38,000 to be allocated among those Societies applying for Deadline 1. (Any funding must be used within one year of the request being received.) In addition, there is \$25,000 available for recurring requests, which, if approved, are guaranteed for three years.

#### **Deadline 2: Friday, July 25, 2025**

Applications will be reviewed in August by CPEC against the criteria and requirements. If funding is granted, the decision will be communicated to the Society by the end of August. For 2025, OAA Council had budgeted a total of \$38,000, in addition to any funding left over from Deadline 1, to be allocated among Societies applying for Deadline 2. (Any funding must be used within one year of the request

being received.) Any remainder of the \$25,000 available for recurring requests is also available.

## Evaluation

The OAA's Communications and Public Education Committee (CPEC) will evaluate submissions using these **four key criteria**:

- The project clearly **furtheres the OAA's objective to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences;**
- There is **demonstrated need and relevance;**
- The project's **feasibility and likelihood of success;** and
- The project's **potential impact.**

### Please Note:

- Priority will be given to projects that address the OAA's key strategic themes of **climate action and equity, diversity, inclusion, and Reconciliation.**
- If a Society is requesting funding for an initiative that involves **an agreement or contract with a third party, that agreement must also be provided.**
- It is possible that the Public Awareness Funding route may be more appropriate for some projects.

Each application will be evaluated on the individual merits of the proposal and how it addresses the objectives of the Association, with priority given to projects excelling under the following criteria:

- potential to increase public awareness/appreciation of architecture and the allied arts & sciences
- innovation, creativity, and relevance;
- ability to attract attendance and successfully run event/initiative; and
- alignment to goals, priorities, and themes of the five year strategic plan, which include Climate Action and Equity, Diversity, and Inclusion.

Please note: if a Society submits multiple proposals, each one will be evaluated individually. Societies are asked to mark those requests in order of priority or preference.

## Timeline

### Submissions Due Mid-March Annually

- **Next deadline: Monday, March 16, 2026**
- **Total Available = \$38,000 (one-time) + \$25,000 (recurring)**
- APRIL: CPEC reviews and approves funding requests
- APRIL-MAY: decisions are communicated to applicants
- MAY: funding issued to successful applicants

### Submissions due Mid-September Annually

- **Next deadline: Monday, September 14, 2026**
- **Total Available = \$38,000 (one-time) + remaining funding from March (one-time and recurring)**

**Commented [CM6]:** Very clear criteria outlined for both applicants and evaluators' benefit

**Commented [CM7]:** Later deadline to align with Public Awareness Funding program

**Commented [CM8]:** Later deadline to align with Public Awareness Funding program

- OCTOBER: CPEC reviews and approves funding requests
- OCTOBER-NOVEMBER: decisions are communicated to applicants
- NOVEMBER: funding issued to successful applicants

**NOTE: Any Society Project Funding must be used within one year of the request being received and must be accounted for the following year's Society Annual Report.**

Please direct any questions, comments, or concerns to the OAA Public Outreach Specialist at [CynthiaM@oaa.on.ca](mailto:CynthiaM@oaa.on.ca). If you would like to submit a proposal for consideration, please use the designated form (linked below) or forward your answers to the questions therein in PDF format directly to [CynthiaM@oaa.on.ca](mailto:CynthiaM@oaa.on.ca) by the deadlines outlined above.

**If a Society is requesting an SPF for an initiative that involves an agreement or contract with a third party, that agreement must also be provided to the OAA for review before final approval of any funding.** It is possible that the [Public Awareness Funding](#) route may be more appropriate.

Over the years, the number of requests for Special Project Funding has grown considerably, as well as the amount of funding that has been requested collectively. OAA Council appreciates the level of local involvement that is being demonstrated through these special projects and is pleased to provide the funding to help make them happen.

If you would like the OAA Communications and Public Education Committee to consider a Special Project Funding proposal, please fill in the application through the links below (or provide a response that includes all the information outlined therein) and return it before the specified deadline to [ArchGrad@oaa.on.ca](mailto:ArchGrad@oaa.on.ca).

**[FOR COMMITTEE USE ONLY – criteria reflected in application]**

**Project Evaluation Rubric**

<b><u>Criteria</u></b>	<b><u>Score (1-5)</u></b>
<u>General quality of application</u>	
<b><u>Clearly furthers the OAA's objective to establish classes, schools, exhibitions, or lectures in—and promote public appreciation of—architecture and the allied arts and sciences</u></b>	
<u>Demonstrated need and relevance</u>	
<u>Feasibility and likelihood of success</u>	
<u>Potential impact</u>	
<u>BONUS POINTS: Climate Action</u>	
<u>BONUS POINTS: Equity, Diversity, Inclusion, and Reconciliation</u>	
<b><u>Total Points</u></b>	

**Commented [CM9]:** Rubric created to standardize criteria and evaluation methods

# 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  
November 28, 2025  
(open)  
ITEM: 4.11

**From:** Thomas Yeung, Vice President & PRC Chair

**Date:** November 19, 2025

**Subject:** OAA Document Maintenance - Practice Tips Impacted by CCDC Contract Changes: Updates to Practice Tip PT.23.2.

**Objective:** To provide overview of the updates to PT.23.2 Overview: CCDC Construction Management Contracts and obtain Council endorsement.

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## 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 June 2025, the Canadian Construction Documents Committee (CCDC) released updated versions of its construction management standard contracts—CCDC 5A (Construction Management for Services), CCDC 5B (Construction Management for Services and Construction), and CCDC 17 (Stipulated Price Contract Between Owner and Trade Contractor)—replacing the 2010 editions. These revisions reflect evolving industry practices and regulatory developments, and their release has prompted a comprehensive review and update of several OAA resources in the Practice Tip PT.23.0 Series. A transition period of approximately one year is anticipated to allow for industry-wide adoption and integration of the new documents.

### Key Changes to the Practice Tip PT.23.2 (refer to Appendices 0, 1 and 2)

Practice Tip [PT.23.2 CCDC Construction Management Contracts](#) was originally published in 2012 to provide members with an overview of the various CCDC standard forms of contracts on construction management (CCDC 5A, 5B and 17-2010). PT.23.2 was

published as part of the PT.23.0 Series which also includes [PT. 23.13 CCDC 5A – 2010 – Construction Management Contract – for Services](#), [PT.23.14 CCDC 5B – 2010 – Construction Management Contract – for Services and Construction](#) and [PT. 23.15 CCDC 17-2001 Stipulated Price Contract Between Owner and Trade Contractor for Construction Management Project](#) amongst others.

In keeping with the role of the Practice Resource Committee (PRC), the members of the PRC were first involved back in the spring 2025 in the review of the Practice Tip in consultation with the Practice Advisory Services team. To assist the PRC in their review of revisions to PT.23.2, the attached Summary document was provided to the committee along with the redlined document. See Attachment 0 which provides a high level summary of the changes to the Practice Tip as well as the process of review. Due to the nature of the topic, legal counsel and Pro-Demnity were also involved as part of the maintenance project.

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

The draft was developed by starting with the current version of the Practice Tip, then adjusting it to reflect changes in organization and content. Following input from PRC, the draft was further developed by legal counsel and input from Pro-Demnity. PRC was kept apprised of the process/progress and the final draft version of the document was shared for final feedback at the November PRC meeting. (Refer also to the June and September 2025 Council Memos entitled “Practice Resource Committee (PRC) – Update”.)

### **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) – if required
- Communications to Members: The updated Practice Tip will be posted on the website and featured in an upcoming issue of the OAA’s Practice Advisory Newsletter as well as social media.
- Continue the progress on the updates to the other impacted PT.23 series Practice Tips with input of Practice Resources Committee, legal counsel, Pro-Demnity, etc.

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### **Action**

Council is asked to consider the following motion:

*It was moved by Yeung and seconded by .... That Council endorse the revised OAA Practice Tip PT.23.2 CCDC Construction Management Contracts as presented to Council on November 28, 2025.*

## Attachments

- Attachment 0: Executive Summary (Main Technical and Editorial Changes to PT.23.2)
- Attachment 1: REDLINE - PT.23.2 CCDC Construction Management Contracts (version 1.1)
- Attachment 2: CLEAN PT.23.2 CCDC Construction Management Contracts (version 2.0)

# Practice Tip PT.23.0 Series: PT. 23.2 CCDC Construction Management Contracts Executive Summary

Updated November 18, 2025

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## Background

- Practice Tips (PT) in the PT.23.0 Series focus on industry standard contracts from Canadian Construction Documents Committee (CCDC) (i.e. stipulated price, construction management, and design-build).
- PT.23.2 CCDC Construction Management Contracts was created in 2012. Likely developed as a more “overarching” resource to explain concepts such as: what is construction management (CM), how it can affect architectural services and general procedures when approaching a construction management project. It complements more focused Practice Tips related to CCDC 5A, 5B and 17 that are part of the PT 23.0 Series.
- Back in 2020, some minor edits were done to the resource, such as a change in logo and updated reference to the OAA 600-2021 contract.
- In late 2024, the industry started to anticipate the launch of updated version of the CCDC 5A, 5B and 17 which would incorporate concepts that had been added to the CCDC 2-2020 Stipulated Price Contract, such as “Ready for Takeover”, early occupancy, defining *Payment Legislation*, and others as noted in [PT 23.11](#) “CCDC 2-2020 - Stipulated Price Contract—Overview of the Changes in the 2020 Version and Recommended Supplementary Conditions”.

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## Requirement to Update

- In early 2025, notice of the release of the updated CCDC construction management contracts prompted internal review of the affected Practice Tip PT 23.0 Series on CCDC Documents which included, but is not limited to, a maintenance cycle for the existing resources, as well as anticipating the creation of new Practice Tips for the 2025 versions of the CCDC 5A, 5B and 17.
- The timing around the transition period of these CCDC contract forms, as determined by the Canadian Construction Association (CCA), is also an important factor for scheduling development of new PTs.
- With keeping in mind the multiple PTs affected by this announcement, work started with PT 23.2 CCDC Construction Management Contracts.
- This resource also needs to be updated to:
  - reflect changes to the *Architects Act* and member inclusive language around Lic. Tech.
  - review historical statements/passages that may need to be adjusted to reflect current position of the OAA
  - reference “conflicts of interest” in the *Architects Act*
  - acknowledge changes to Pro-Demnity Policy (i.e. April 1, 2025, updated policy wording of Exclusion 29)
  - reflect changes to the *Construction Act*, along with anticipated updates not yet in effect
  - apply recommended maintenance and formatting (e.g. reduce duplicated information in this PT group)
  - as well as other editorial/housekeeping items.
- This maintenance cycle for PT.23.2 has helped to identify options for approaching future CM focused Practice Tips in this PT 23.0 Series.

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## Overview of the Process and Input from Various Parties – Phased Approach

- Back in spring 2025, PAS started reviewing the possible edits needed to the Practice Tips affected and, as such, prepare for the launch of the updated CCDC 5A, 5B and 17 (2025 versions). In late

June 2025 the new CCDC contracts were released, with a one-year transition period expected for the previous versions of these contract forms.

- PT.23.2, as the lead PT for this group of resources, was considered first up for editing as it is more general in nature and would assist in identifying any material changes that may be anticipated when preparing drafts for the creation of new Practice Tips for the 2025 versions of the CCDC contract forms.
- Preliminary discussion on PTs related to construction management was held at PRC in May (which included a Pro-Demnity Representative)
- Pro-Demnity was also consulted in July for input on updates to PT.23.2, then again in September and October as well as November, to get feedback on proposed PLI related wording.
- OAA has worked with legal counsel during this current phase of maintenance to assess the proposed wording, formatting and organizational changes.
- The current draft of PT.23.2 has been updated to include PRC comments from October's meeting as well as comments from a follow-up conversation with Pro-Demnity in October.
- Minor editorial edits are pending and will be worked on as we prepare for posting the new version on the website following Council review.

## Organization of PT 23.2 and Proposed Changes

- General edits
  - Minor formatting adjustments, such as numbering subsections, for clarity
  - Changes for member inclusive language
  - Adjustments to tone and wording, with input from legal
  - Clarify the version (year) of the CCDC contracts discussed in the PT
- Proposed edits to “**Summary**” section
  - Added note about the updated contracts and the transition period
  - Includes an overview of the structure of the PT for quick reference
  - Clarification that this practice tip focuses on the holder's role in providing architectural services and contract administration for CM project delivery
  - Relocated the list of CM related CCDC contracts from the Background Section and grouped them into the two basic models of CM project delivery
  - Removed historical overview of construction management
  - Removed references to CCA contracts (which have been withdrawn for some time now)
- Proposed edits to “**Background**”
  - Moved “What is Construction Management” from Summary Section to Background Section, for best placement of this introductory information
  - Expanded on the description of the two basic CM models of project delivery and connected it to the description of CCDC's CM related contract forms
  - Described CM's compensation on a “cost plus” basis and options available to be exercised later
  - Added comparisons between design-bid-build project delivery and CM delivery
  - Added note about what owners may consider when seeking CM services
  - Added note about timing of the CM, as owner's advisor, joining the project team
  - Expanded subsection about “How Construction Management Can Affect CoP Holder's Services”, including more descriptive and bolded subtitles for readability
  - Expanded on the importance of the coordination of services between the holder and CM and consideration of any overlap in services
  - Added note about sequential tendering, multiple bid packages and requests for substitutions in the holder's workflow
  - Added note about CM's involvement in cost control during the design phase
  - Added note about holder's scope of services to clarify the expectations for tender packages

- Added note about the CM presenting the feasibility and impacts of requests for substitutions to owner, consultants and holder for discussion, including net savings after including costs for changes to updated contract documents
- Added note about possible impacts of CM, as owner's agent, on permit and approvals processes
- Added note about CCDC 17, with CM as payment certifier, and holder's involvement in certifying substantial performance
- Added note about applicable legislation (i.e. who may be considered a "constructor" under OHSA)
- Introduced bolded subtitles for readability
- Removed references to withdrawn CCA contracts
- Proposed edits to "**Suggested Procedures**"
  - Expanded subsections for each suggested procedure and introduced bolded subtitles
  - Added content that flags items for consideration, such as the role of the CM in relation to holder's services
  - Added note about avoiding giving clients legal advice and making strong recommendations which may draw excess risk to the holder
  - Added note about applicable legislation (i.e. who may be considered a "constructor" under OHSA)
  - Deletion of procedure that addressed conflict of interest if architect is acting as CM – refer to new "Note" below.
- Proposed new separate "Note" about conflict of interest and considering taking on the CM role:
  - Relocated information previously under the subtitle "The Architect as CM" in the Background section and also from the fifth Suggested Procedure to a "Note" located at the end of the PT's content focused on holder's provision of architectural services and contract administration
  - For conflicts of interest, reference to Regulation 27 under the Act was added, along with reference to Pro-Demnity Policy Exclusion when providing both design and construction services on the same project or part thereof
  - Added note about seeking advice from legal and insurance advisors, along with being aware of legal and contractual responsibilities if considering taking on the CM role (e.g. being a "constructor" under OHSA, Tarion requirements, etc.)
- Proposed edits to "**References**"
  - Added reference to CCDC Guides for each CM contract and CCA Guide to CM method
  - Updated PT 23 series numbering for PTs related to Construction Act (versions related to Construction Lien Act have been withdrawn in June 2025)
  - Updated the title of Practice Tip PT.26 Conflict of Interest Guideline – Provision of Architectural Services and Construction Services
  - Add references to OAA Contracts and Guides
  - Add reference to section of Canadian Handbook of Practice

## Next Steps

- Following November 2025 Council meeting, PAS to finalize the draft of PT. 23.2 for upload to the OAA Website and share with the membership.
- Continue the work on other Practice Tips in the PT 23.0 Series for review by PRC (ongoing)

## CCDC Construction Management Contracts

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### Summary

The purpose of this Practice Tip (PT) is to address the CoP holder's role in providing architectural services including contract administration for projects utilizing construction management project delivery.

The Canadian Construction Documents Committee (CCDC) publishes standard forms of contracts and guides for project delivery, including for use when implementing construction management (CM) project delivery.

The CCDC publishes a suite of three standard contract forms for the two basic variations of CM project delivery:

- For Construction Management for Services (also known as "Construction Manager as Agent" or "Construction Manager Not at Risk")  
CCDC 5A Construction Management Contract – for Services, and  
CCDC 17 Stipulated Price Contract for Trade Contractors on Construction Management Projects
- For Construction Management for Services and Construction (also known as "Construction Manager at Risk")  
CCDC 5B Construction Management Contract – for Services and Construction

This PT will provide an overview of the following:

- General background of what is construction management
- Brief summary of the CCDC 5A, CCDC 5B and CCDC 17 contract forms
- How construction management can affect certificate of practice (CoP) holder's services and proposed items for consideration
- Suggested Procedures when becoming familiar with construction management
- References

Individual Practice Tips in the PT.23 series were prepared for each of the three CCDC contract forms prepared for CM project delivery issued in 2010. Additional Practice Tips are being prepared for the 2025 versions of these three construction contracts.

Note: In June 2025, CCDC published updated versions of these three standard contract forms. A quick transition to the new versions is encouraged. It is anticipated that by Summer 2026, the 2010 versions of the contracts and their associated guides will no longer be available for download.

This Practice Tip (PT) offers information on alternative forms of project delivery through the utilization of a construction manager's (CM) services and the 2010 suite of three Canadian Construction Documents Committee (CCDC) construction management contracts. Separate PTs have been prepared for each of the three new CCDC CM contracts.

## What Is Construction Management?

Construction management is a term for alternative forms of project delivery where a construction manager replaces the role a general contractor has in traditional design-bid-build delivery. The owner still engages an architect to design and prepare construction documents, but also engages a CM at an early stage as a consultant to provide advice, oversee and manage construction: planning, costs, scheduling, methods and materials. This CM could be a contractor, an architect or engineer, a consulting person or other entity as long as they have the necessary construction expertise and trust of the owner. The CM may also be brought on board after construction documents have been prepared. The CM will have a full time person on site acting as a site superintendent the same way that a general contractor does in traditional project delivery.

The philosophy behind the benefits of CM is similar to that currently ascribed to *Integrated Project Delivery*; bringing a more comprehensive team together for collaboration during design and the ability to start construction earlier than with traditional design-bid-build. In construction management, instead of bidding by general contractors, packages of work are bid for by individual trades, organized by the CM. Excavation, foundations or structure could be bid before the construction documents are completed for all the interior works. The individual trade contracts can be signed either with the owner or with the CM, which creates the two basic variations in construction management—one with CM as advisor providing consulting services only; and the other being a CM as advisor plus contractor providing consulting services and doing the construction.

In one scenario the owner signs contracts directly with the trades and the CM provides advice and management only—often referred to as CM as Agent. Alternatively the CM signs all the contracts with trades, and takes on the risk of the construction performance and the cost and schedule for the same, while still providing construction management advice in the early stages—often referred to as CM at Risk.

The cost of the construction can be set up in several ways: cost plus (minimal risk to the CM), a guaranteed maximum price (GMP), a fixed price (maximum risk to CM) or various arrangements of GMP with a sharing of cost savings between the owner and CM.

## History of Construction Management

When construction management is described as “starting construction before the plans and specs are done”, it shows that the process has been around since the time of the pyramids. Owners acted as general contractor by utilizing their own construction expertise or by hiring outside entities. The multiple trade works were done through contracts directly to the owner. The owner had the control and responsibility that normally rests with a general contractor. Some owners prefer this extra control, some like the extra control but not the added risk.

Written contracts for the construction management process were introduced in the early 1980's around the same time that fast track, project management and computers began to be common in the industry. The impetus for fast track and construction management came in part from the consistent desire of owners to reduce costs and time for project delivery. Construction management allowed owners to bring in specialized construction expertise prior to bidding and more importantly allowed construction to start earlier than the traditional design-bid-build approach.

The Canadian Construction Association (CCA) introduced a “Guide to Construction Management” in 1979 with sample contract terms and nine years later published CCA 5—1988 “Construction Management Contract Form between Owner and Construction Manager”. The CCA 17—1996 “Stipulated Price Contract for Trade Contractors on Construction Management Projects” was used for trade contracts.

The term CM as Agent began to be used describing a new role for contractors in providing consulting services to the owner as an advisor or agent, with a duty of care and an obligation to advance the interests of the owner. fiduciary responsibility (i.e. trust and confidence) to advance the interests of the owner. The responsibility for a CM in this regard is similar to the responsibility of architects providing their services to owners.

Construction management is used with many variations. The CCA 5-1988 was used but did not adequately deal with all variations. For years parties have created their own contracts using pieces of other standard contracts. In 2008 the CCDC was tasked with developing appropriate changes.

## Background

### 1. What Is Construction Management?

Construction management is a term used to describe models for project delivery where a construction manager is engaged, particularly for performance of advisory services during the design and pre-construction phase. Where the CM also undertakes performance of construction work in the CM for services and construction model, the CM's role during the construction phase is similar to that of the general contractor in the design-bid-build project delivery model (CCDC 2).

In all variations of CM project delivery, the owner engages a CoP holder and design team (i.e. *Consultants*) to design and prepare construction documents, but the owner also typically engages the CM, as an advisor to the owner and design team, to collaborate during the design and pre-construction phases with respect to constructability, estimated construction costs, and project scheduling.

Where the CM is responsible for services and construction, there is also opportunity for construction work to commence earlier than is typically possible for design-bid-build delivery as the owner and CM may agree to proceed with certain work using partially completed construction documentation. Accordingly, a CM requires construction expertise and the trust of the owner. While early engagement of the CM is most common, a CM may also be brought on board after construction documents have been prepared. As both CM delivery models require the CM to undertake a supervisory role during the construction phase and performance of the work, the CM will typically have a full-time person on site acting as a site superintendent.

In construction management project delivery, work packages are prepared by the CM together with the owner and design team for bid by individual trades – the full scope of work is not issued for tender by general contractors as it is in a typical design-bid-build project delivery. For example, excavation, foundations, or structure can be bid as one or more packages before the construction documents are completed for interior works. Such sequential tendering or issuance of multiple bid packages impacts the consultant's workflow and must be coordinated with and accounted for in the consultant's contracts. Contracts with the individual trade contractors are then entered into either directly by the owner (when the CM is responsible for services) or by the CM as subcontracts (when the CM is responsible for services and construction). The CM's responsibility for performance of the construction work is the key distinction between the two basic variations of construction management project delivery – one with CM as advisor providing *Services only*; and the other with CM as advisor, plus acting as contractor undertaking responsibility for the construction work.

Both CM delivery models provide for the CM to be paid a fee for its performance of services and reimbursed for incurred expenses, on the basis of any of a stipulated amount, hourly rates, or a percentage fee based on cost of the work. For the "CM for services and construction" delivery model, the CCDC 5B additionally provides for the CM to be compensated for the performance of the *Work* on a "cost plus" basis (limited cost certainty for the owner) with options that can be exercised later by the parties (once design and procurement are further advanced) to provide for a guaranteed maximum price (GMP), various arrangements of GMP with a sharing of cost savings between the owner and CM, or for the contract to be converted to a stipulated price, similar to a CCDC 2. In November, 2010 the CCDC published a new suite of three standard contract forms for Construction Management:

CCDC 5A — Construction Management Contract — for Services" (replaces the old CCA 5-1988, also referred to as CM as Agent)

CCDC 17 — Stipulated Price Contract between Owner and Trade Contractor for Construction Management Projects" (replaces the old CCA 17-1996)

CCDC 5B — Construction Management Contract — for Services and Construction" (is brand new, also referred to as CM at Risk)

CCDC 5A is intended for use when the CM acts as consultant (agent) of the owner, providing advisory services. The owner contracts directly with trade contractors to perform the construction work, using a new companion CCDC 17 document. The CM oversees the trade contractors.

CCDC 17 is a stipulated price contract between the owner and a trade contractor for use when the CM is not doing construction. It is similar to the CCA 1 document used between GC's and trade contractors in traditional construction models.

~~CCDC 5B is used when the CM provides pre-construction advisory services to the owner and then undertakes the construction. The CM engages trade contractors as subcontractors and is responsible for their performance. The CM acts as consultant to the owner in the design phases, but as the equivalent of a general contractor during the construction phase. When a CM is bound to a maximum price, the most fundamental character of the relationship is changed. In addition to acting in the owner's interest, CMs must also protect their own financial interests and control construction costs to not exceed the maximum price.~~

## 2. Brief Summary of CCDC 5A, 5B and 17

The CCDC 5A and CCDC 17 contract forms are intended for use when the construction manager (CM) acts as an "agent of the Owner", in a limited capacity, also referred to as an advisor to the owner, providing only construction management services. In this delivery model, the owner contracts directly with the construction manager for the provision of its services using the CCDC 5A document and directly with all trade contractors for their performance of the construction work using the companion CCDC 17 document. While the CM's services typically include coordination of the trade contractors, the CM has no direct contractual relationship with the trade contractors and is not directly responsible for the trade contractors' performance.

As no single trade contractor has responsibility for the construction site pursuant to this delivery model, the CCDC 5A provides that the owner is responsible for construction health and safety at the construction site and the CM's services may include responsibility for establishing, initiating, maintaining, and overseeing the health and safety precautions and programs required to be put in place. In Ontario, this means that the owner will likely be considered the "constructor" for the purposes of Occupational Health and Safety Act (OHSA) unless express arrangements are made to delegate this role to the CM such as through supplementary conditions. Where this occurs, it is also recommended that the owner also amend its contracts with trade contractors to recognize this role being undertaken by the CM. Similar to the CCDC 2 (stipulated price/lump sum) and CCA-1 (stipulated price subcontract) standard contract forms, the CCDC 17 provides for the trade contractor to perform construction work on a stipulated price basis.

The CCDC 5B contract form is used when the CM undertakes performance of the construction work in addition to construction management services. In this delivery model, the owner contracts directly with the CM using the CCDC 5B document. The CM provides pre-construction services as an owner's advisor in the design phases. Trade contractors are then engaged by the CM as subcontractors, often using the CCA-1 standard form of subcontract. As a result, during the project's construction phase the CM's obligations closely resemble those of a general contractor under delivery models such as design-bid-build, such as direct contracting with Subcontractors.

### 4.3. How Construction Management eCan Affect CoP Holder's Architect's Services

The professional role of the CoP holder as administrator of the construction contracts held by the owner can be more complex in CM project delivery, particularly in "CM as Agent" project delivery, because there are more stakeholders (such as the owner, sponsor/lender, CM, trade contractors, subcontractors, suppliers, and others in the pyramids of contracts).

While some CoP holders may have reservations about involvement in a project that includes a construction manager as part of the team, CM project delivery can be a viable and effective alternative method of delivery. Construction management offers valuable advantages, though it may not be the best fit for every project. The CM's services often include the provision of construction advice. When seeking CM services (whether via an RFP or other form of procurement), owners may consider the education, training, construction experience, and construction management experience (as may be appropriate to the project) of the CM's team members, especially their proposed project manager, estimator and superintendent. Currently, there are no regulatory requirements governing the role of a Construction Manager in Ontario. Holders may also want to consider these factors before becoming involved in a project with a CM that is inexperienced.

It is also important to understand from the client if the CM will join the project team during the design phase, as this will likely impact the design services of the holder and other consultants. Here are some ways that CM project delivery models may affect the holder's services (as compared to the more common design-bid-build delivery using a stipulated price contract such as the CCDC 2) and introduce complexity and risks:

### **3.1 General and Administrative Items to Monitor**

- Be aware that with a CM as an owner's advisor, the project team is more complex, and it is possible for the roles and responsibilities of the holder and CM to overlap and become blurred. Additionally, advice from the holder may, at times, conflict with that of the CM. This relationship and complexity can impact the level of effort required of the holder.
- Holders may have less direct contact with the owner as coordination and other communication services may be undertaken by the CM. During the construction phase in particular, the CM will often take the lead.
- In the CM for services and construction delivery model where the CM and owner have an agreement that includes shared costs savings for the work, there can be more extensive requests or recommendations from the CM to consider product/material substitutions and additional design alternatives.
- For either CM delivery model, if the owner and CM are unwilling to share a copy of their agreement with the holder, the holder's ability to perform any contract administration and related obligations will be materially undermined, including hindering of the holder's ability to understand the level of administration and coordination expected or required.

### **3.2 Possible Impacts on Design Services Phase**

- There may be more options requested during design phases as the CM considers different construction techniques and/or materials.
- In both the CCDC 5A and 5B contracts, the CM's services schedule provides the option for the CM's services to include preparing or confirming the *Construction Cost Estimate* at each phase of the design and advising the owner of recommendations for corrective action when it exceeds the *Construction Budget*. The CM's involvement in cost control during the design phase may reduce the risk of cost overruns during bidding.
- The holder's design concerns and the CM's objectives, may not always coincide; the owner will play a crucial role in making decisions and balancing priorities.

### **3.3 Possible Impacts on the Development of Construction Documents**

- The preparation of some drawings is often requested to be expedited, reducing available time for coordination and checking for completeness and errors.
- The CM often requests preparation of drawing and specification packages for specific trades versus the single comprehensive set of drawings and specifications typically prepared for a single tender under the design-bid-build project delivery model. This requires more time to coordinate and modify earlier packages (e.g. site works and structural design) as the later packages get completed, plus additional printing and preparation costs. It is further noted that the quantity of drawing packages required to be prepared by the holder for the tendering process may also be subject to change by the CM and client during the pre-construction phase. It is accordingly recommended that the holder's scope of services specify the original expectations for tender drawing packages so that any changes to these expectations can be addressed as a change to the holder's services under their contract.
- The CM may wish to change Division 01 of the specifications (e.g. general requirements which set out the duties and responsibilities of the owner, CM and consultants).

### **3.4 Possible Impacts on Bidding**

- Though identified during the development of construction documents, some difficulty may remain in defining the scope of contract document packages for contractors performing work for more than one trade or division of the specifications. The bid management process implemented by the CM as part of its services should clearly identify the scope of work for each trade and communicate to the holder any resultant adjustments needed within the construction documents.
- Good communication from the CM regarding the status of bidding and contract awards is essential.

- The CM and/or trade contractors will often request or suggest substitutions or alternatives to products, materials, and methods specified by the holder. The CM may present the feasibility of the change, along with any impacts, to the owner, consultants and holder for discussion. Anticipated cost savings should include any cost for changes to the holder's and its consultant's services, for example, updating the contract documents.

### **3.5 Possible Impacts on Approvals and Permit Processes**

- As noted above, the roles and responsibilities of the CoP holder and CM may overlap and become blurred. This risk can arise in respect of the parties' roles and responsibilities for the management of approval and permitting processes. Address this at the project outset and include it in the project communications plan.
- Approval and permitting processes can give rise to scheduling conflicts outside of the control of the project team, including the variability of these processes for a particular project. As a result, members of the project team involved in the project's design and delivery of construction services should discuss the constraints and options for achieving the owner's requirements, such as obtaining partial or conditional permits and issuing sequential tenders.
- As changes or substitutions are considered, assessing compliance risk may also require review of anticipated timing and costs to revise approvals and/or permits already obtained by the owner.

### **3.6 Possible Impacts During the Construction Phase**

- If not amended through supplementary conditions, CM at Risk project delivery under CCDC 5B provides for the *Consultant* to undertake the role of making interpretations and findings in matters relating to performance of the *Work* or the requirements of the *Contract Documents*.

Under the CCDC 17 for CM as Agent project delivery, however, it is the CM that is to make interpretations and findings in matters relating to performance of the Work or the requirements of the Contract Documents, except with respect to any and all architectural and engineering aspects of the Work and the *Consultant* is only obligated to give interpretations and make findings on matters in question relating to the requirements of the design.

Consider whether the construction contract, or your professional services contract, may need to be adjusted to align with client expectations.

- For CM at Risk project delivery, CCDC 5B provides for the *Consultant* to undertake the role of payment certifier for the CM's *Fee for Construction Services* and the *Work*, but not for the CM's *Pre-construction Services*.

Under CCDC 17, for CM as Agent project delivery, the CoP holder is not responsible to certify payments to be made to trade contractors as this is undertaken by the CM. As a result, the holder will have less involvement and knowledge about the project's financial progress. CCDC 17, however, still contemplates the consultant's involvement with the CM in certifying substantial performance of the work and the holder may be asked to prepare certificates of substantial performance for many separate trade contracts.

Payment certification and related services accordingly require close coordination between the architectural services and construction contracts.

### **3.7 Possible Impacts For Project Close-Out & Commissioning**

- At the beginning of the project, establish who is coordinating the delivery of close-out documents and commissioning services. This may also include a 3<sup>rd</sup> party commissioning agent.

To have the CM as the key player in the project may be of concern to some architects but it is a valid approach for an alternative form of delivery. Construction management has its place but it is not ideal for all projects.

CM's are offering construction advice. They should have education, training, construction and construction management experience appropriate to the task. There are no regulatory requirements to be a CM. Beware of becoming involved in a project with a CM that is inexperienced.

CCDC contracts are prepared by consensus of a diverse group of stakeholders; however the OAA is concerned that the splitting of the role of making interpretations and findings between the consultant and the CM in CCDC 5A and 17 can increase the likelihood of conflicts and believes that the role of making findings should be left only with the consultant as it was in the previous CCA 5—1988 and the CCA 17-1996. The OAA has developed amendments and supplementary conditions to achieve this change for the new 5A and 17 contracts. Refer to PT.23.3 “CCDC 5A, 2010—Construction management Contract—For Services” and PT.23.5 “CCDC 17, 2010—Stipulated Price Contract between Owner and Trade Contractor for Construction Management Projects”.

Ways that Construction Management can affect the architect's services include the following:

- General

- It is critical to be aware that with a CM as an owner's consultant, the team is more complex, as advisory roles can be blurred, advice from the architect can be in conflict with that of the CM. Architects often will have less direct contact with the owner. Some owners engage a CM because they have confidence in the practicality of a contractor. In the construction phase the CM will take the lead.
- Where the CM and owner have an agreement that includes shared costs savings, there can be extensive requests to consider or recommend alternatives by the CM or individual trades.
- Often the owner and CM will not want to share a copy of their agreement with the architect, which makes it unworkable to coordinate services or to know the level of administration expected of the architect during the construction phase.

- Design

- There can be more options requested during design phases as a CM considers different construction techniques and/or materials.
- The architect's design and CM issues may not coincide (the owner needs to be involved in decisions and priorities).

- Construction Documents

- The preparation of drawings is often requested to be expedited reducing available time for coordination and checking for completeness and errors.
- CMs often want drawing packages for certain trades versus the traditional single comprehensive set of drawings. This requires more time to coordinate and modify early packages as the remaining packages get completed plus additional printing and preparation costs.
- CMs may wish to change Division 1 of the specifications.

- Bidding

- There is some difficulty in defining the scope of trade packages. The CM should clearly define the scope of works for each trade.
- There is a need for good communication from the CM regarding the status of bidding and contract awards.

- Construction Phase

- The CM takes more of a lead role in the construction phase; the architect has less direct communication with the owner.
- The CCDC CM contracts (5A & 17) if not amended (refer to OAA Supplementary Conditions), have the usual role of the architect to make interpretations and findings in matters of dispute split between the architect and the CM.

- The architect may not be responsible to certify payments and have less involvement and knowledge about financial progress; on the other hand they may be asked to certify payments and do Certificates of Substantial Performance for many separate trades.

It can be more complex to maintain the traditional professional role of the architect in being fair to both sides (owner and contractor) because there are more 'sides'. On owner/developer projects, the roles and responsibilities of the owner/developer and CM can be very blurred.

### **The Architect as CM**

Architects can be CMs and enter into a CCDC 5A agreement with an owner. Some architects doing small projects such as restaurant or house renovations may be asked by the client to arrange the trade works but don't feel it necessary to have a general contractor. It may seem like a construction management approach could fulfill these directions; however the arrangement produces conflicts of interest and other potential conflicts. Construction management has many variations and keeping the contractual arrangements clear is a challenge.

The OAA does not discourage members from pursuing the provision of construction services under a separate entity and have prepared a guideline to assist members and practices in understanding the issue of conflict of interest as it relates to the provision of architectural services and construction services. Refer to Practice Tip PT.26 — "Provision of Architectural Services and Construction Services — Conflict of Interest Guideline".

### **Suggested Procedures**

For projects using the construction management delivery models and associated CCDC standard form of contracts, holders should consider the following general procedures:

1. **Do your research – understand the roles, risks and other items such as the impacts on level of effort and associated fees:** Become familiar with the construction management form of project delivery, including a thorough review of CCDC guides and standard contract forms, as well as sources for additional information such as Royal Architectural Institute of Canada (RAIC), Canadian Handbook of Practice (CHOP), OAA Practice Tips, and OAA recommended supplementary conditions.  
Pay close attention to items such as:

- Understanding the roles of each stakeholder and level of experience with construction management project delivery, as well as the timing of when the CM would be integrated into the lifecycle of the project, as this will affect the role/tasks of the CoP holder.
- The potential risks for client/owner, CoP holder and construction manager.
- The possible impacts to the architectural services fee structure and any subconsultants retained by the holder, along with any client's consultants with whom the holder may coordinate.

While you can appropriately share with your client your understanding and experience with construction management projects, remember to avoid giving legal advice.

2. **Client's Selection of CM for a Project:** To clients/owners asking about construction management, provide information, sources for additional information, and possible pros and cons of the various CM project delivery options. Remember that the determination of the project delivery method is an owner's decision. If you advise and make strong recommendations it may be seen as your decision, and your risk.

Note that for CM as Agent delivery under the CCDC 5A, with each trade having a direct contract with the owner, the owner will likely be considered the "constructor" under OHSA, unless express arrangements are made to have the CM undertake this role, such as through supplementary conditions. Remember to avoid giving legal advice while sharing your understanding and experience.

**3. Discuss the client expectations and how this will impact professional services contracts for the consultants on the team:** Coordinate the holder's services in its agreement with the client/owner with (i) the role being performed by the CM in its contracts with the owner (the CCDC 5B or CCDC 5A) and (ii) the role being performed by the holder in the client/owner's construction contracts (the CCDC 5B or CCDC 17). There may be additional, or possibly fewer, services and fees warranted for construction management projects. As it pertains to preparing contracts for professional services (e.g. OAA Contract Suite 2021), including when you engage the consultants, take time to review the scope of Additional Services as they may overlap with the CM's services. This same process should be applied to other disciplines (e.g. MEP, Structural, etc.).

In the context of CCDC 5B, discuss the likelihood that the client/owner may explore the different CM compensation options (such as the GMP Option, the GMP Plus % Cost Savings Option or the Stipulated Price Option) as this will affect the holder's services agreement, as well as the services of the other consultants on the team. Refer to CCDC 46, a guide to CCDC 5B, and related Practice Tips and other resources noted below.

**4. Consider critical items you may want to coordinate with the Owner/CM contract, including supplementary conditions:** If presented with CCDC 5A, CCDC 5B or CCDC 17 contracts by a client/owner or CM, discuss with them the impact on your professional services. Coordinate the holder's contracted services with those expected by the client/owner or CM for the project. Consider incorporation of the OAA recommended supplementary conditions in the Practice Tip corresponding to each of the CCDC contract forms as noted below. Consult a lawyer as required. Clients contemplating the use of supplementary conditions should be advised to seek their own legal counsel.

- ~~1. Become familiar with the construction management form of project delivery including standard contracts available and sources for additional information such as Royal Architectural Institute of Canada (RAIC) Canadian Handbook of Practice (CHOP), OAA PTs, and OAA recommended supplementary conditions.~~
- ~~2. To clients asking about construction management, provide information, sources for additional information, possible pros and cons of options remembering that the determination of the project delivery method is an owner's decision. If you advise and make strong recommendations — It may be seen as your decision and your risk.~~
- ~~3. Coordinate the architect's services in the client/architect agreement with the roles for the architect in the construction contracts and client/CM contract. There may be additional or possibly less services and fees warranted for construction management projects.~~
- ~~4. If presented with CCDC CM contracts by an owner or CM, discuss the incorporation of the OAA recommended supplementary conditions. Again coordinate the architect's contracted services with those expected of you in a construction management project.~~
- ~~5. If taking on the CM role as an architect, be aware of the potential conflicts of interest and that a CM is expected by the client and the trades to have appropriate construction expertise and experience. You are also advised to consult with legal and professional liability insurance advisors.~~

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**Note:** Be aware of conflicts of interest and the possible impact on your professional liability insurance (PLI) coverage if providing architectural services and construction services in respect of the same project or part thereof.

If considering taking on the CM role, be aware of the potential conflicts of interest, coverage exclusions under your insurance policies (e.g. PLI), as well as other legal and contractual responsibilities (e.g. related to being a "constructor" under OHS/A, requirements under Tarion, etc.). Consult with legal and insurance advisors including, but not limited to, professional liability insurance advisors prior to taking on this role. Refer to *Architects Act*, Regulation 27, Section 43, and Practice Tip PT.26 – "Provision of Architectural Services and Construction Services – Conflict of Interest Guideline", as well as your Pro-Demnity policy, including specifically Exclusion 29. Delivery of Construction Services.

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## References

[CCDC website](#) [CCDC website](#) – [for contracts, including the CCDC 5B related subcontract CCA 1-2021 Stipulated Price Subcontract, and guides such as CCDC 45-2010, 46-2010 and 47-2010](#)

[PTs 23.3, 23.4, & 23.5 which discuss CCDC 5A, 5B, & 17](#)

[PTs 23.13, 23.14, & 23.15 which discuss CCDC 5A-2010, 5B-2010, & 17-2010](#)

[PT.23.23, PT.23.24 & 23.25 which discuss CCDC 5A-2025, 5B-2025 & 17-2025](#)

[PT.26 – Conflict of Interest Guideline – Provision of Architectural Services and Construction Services; including reviewing Pro-Demnity Policy Language](#)

[OAA Contracts and Guides: Services Schedules and Appendices; Guide Commentary \(refer to “General” and “Delivery Method and Construction Contract”\)](#)

[Canadian Handbook of Practice \(CHOP\) Edition 3 Chapter 4.1 Types of Design-Construction Project Delivery](#)

[Canadian Construction Association – CCA 26-2016 A Guide to the Construction Management Method](#)

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

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## CCDC Construction Management Contracts

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This PT will provide an overview of the following:

- General background of what is construction management
- Brief summary of the CCDC 5A, CCDC 5B and CCDC 17 contract forms
- How construction management can affect certificate of practice (CoP) holder's services and proposed items for consideration
- Suggested Procedures when becoming familiar with construction management
- References

Individual Practice Tips in the PT.23 series were prepared for each of the three CCDC contract forms prepared for CM project delivery issued in 2010. Additional Practice Tips are being prepared for the 2025 versions of these three construction contracts.

Note: In June 2025, CCDC published updated versions of these three standard contract forms. A quick transition to the new versions is encouraged. It is anticipated that by Summer 2026, the 2010 versions of the contracts and their associated guides will no longer be available for download.

### Background

#### 1. What Is Construction Management?

Construction management is a term used to describe models for project delivery where a construction manager is engaged, particularly for performance of advisory services during the design and pre-construction phase. Where the CM also undertakes performance of construction work in the CM for services and construction model, the CM's role during the construction phase is similar to that of the general contractor in the design-bid-build project delivery model (CCDC 2).

In all variations of CM project delivery, the owner engages a CoP holder and design team (i.e. *Consultants*) to design and prepare construction documents, but the owner also typically engages the CM, as an advisor to the owner and design team, to collaborate during the design and pre-construction phases with respect to constructability, estimated construction costs, and project scheduling.

Where the CM is responsible for services and construction, there is also opportunity for construction work to commence earlier than is typically possible for design-bid-build delivery as the owner and CM may agree to proceed with certain work using partially completed construction documentation. Accordingly, a CM requires construction expertise and the trust of the owner. While early engagement of the CM is most common, a CM may also be brought on board after construction documents have been prepared. As both CM delivery models require the CM to undertake a supervisory role during the construction phase and performance of the work, the CM will typically have a full-time person on site acting as a site superintendent.

In construction management project delivery, work packages are prepared by the CM together with the owner and design team for bid by individual trades – the full scope of work is not issued for tender by general contractors as it is in a typical design-bid-build project delivery. For example, excavation, foundations, or structure can be bid as one or more packages before the construction documents are completed for interior works. Such sequential tendering or issuance of multiple bid packages impacts the consultant's workflow and must be coordinated with and accounted for in the consultant's contracts. Contracts with the individual trade contractors are then entered into either directly by the owner (when the CM is responsible for services) or by the CM as subcontracts (when the CM is responsible for services and construction). The CM's responsibility for performance of the construction work is the key distinction between the two basic variations of construction management project delivery – one with CM as advisor providing *Services* only; and the other with CM as advisor, plus acting as contractor undertaking responsibility for the construction work.

Both CM delivery models provide for the CM to be paid a fee for its performance of services and reimbursed for incurred expenses, on the basis of any of a stipulated amount, hourly rates, or a percentage fee based on cost of the work. For the "CM for services and construction" delivery model, the CCDC 5B additionally provides for the CM to be compensated for the performance of the *Work* on a "cost plus" basis (limited cost certainty for the owner) with options that can be exercised later by the parties (once design and procurement are further advanced) to provide for a guaranteed maximum price (GMP), various arrangements of GMP with a sharing of cost savings between the owner and CM, or for the contract to be converted to a stipulated price, similar to a CCDC 2.

## **2. Brief Summary of CCDC 5A, 5B and 17**

The CCDC 5A and CCDC 17 contract forms are intended for use when the construction manager (CM) acts as an "agent of the *Owner*", in a limited capacity, also referred to as an advisor to the owner, providing only construction management services. In this delivery model, the owner contracts directly with the construction manager for the provision of its services using the CCDC 5A document and directly with all trade contractors for their performance of the construction work using the companion CCDC 17 document. While the CM's services typically include coordination of the trade contractors, the CM has no direct contractual relationship with the trade contractors and is not directly responsible for the trade contractors' performance.

As no single trade contractor has responsibility for the construction site pursuant to this delivery model, the CCDC 5A provides that the owner is responsible for construction health and safety at the construction site and the CM's services may include responsibility for establishing, initiating, maintaining, and overseeing the health and safety precautions and programs required to be put in place. In Ontario, this means that the owner will likely be considered the "constructor" for the purposes of Occupational Health and Safety Act (OHSA) unless express arrangements are made to delegate this role to the CM such as through supplementary conditions. Where this occurs, it is also recommended that the owner also amend its contracts with trade contractors to recognize this role being undertaken by the CM. Similar to the CCDC 2 (stipulated price/lump sum) and CCA-1 (stipulated price subcontract) standard contract forms, the CCDC 17 provides for the trade contractor to perform construction work on a stipulated price basis.

The CCDC 5B contract form is used when the CM undertakes performance of the construction work in addition to construction management services. In this delivery model, the owner contracts directly with the CM using the CCDC 5B document. The CM provides pre-construction services as an owner's advisor in the design phases. Trade contractors are then engaged by the CM as subcontractors, often using the CCA-1 standard form of subcontract. As a result, during the project's construction phase the CM's obligations closely resemble those of a general contractor under delivery models such as design-bid-build, such as direct contracting with *Subcontractors*.

### 3. How Construction Management Can Affect CoP Holder's Services

The professional role of the CoP holder as administrator of the construction contracts held by the owner can be more complex in CM project delivery, particularly in "CM as Agent" project delivery, because there are more stakeholders (such as the owner, sponsor/lender, CM, trade contractors, subcontractors, suppliers, and others in the pyramids of contracts).

While some CoP holders may have reservations about involvement in a project that includes a construction manager as part of the team, CM project delivery can be a viable and effective alternative method of delivery. Construction management offers valuable advantages, though it may not be the best fit for every project. The CM's services often include the provision of construction advice. When seeking CM services (whether via an RFP or other form of procurement), owners may consider the education, training, construction experience, and construction management experience (as may be appropriate to the project) of the CM's team members, especially their proposed project manager, estimator and superintendent. Currently, there are no regulatory requirements governing the role of a Construction Manager in Ontario. Holders may also want to consider these factors before becoming involved in a project with a CM that is inexperienced.

It is also important to understand from the client if the CM will join the project team during the design phase, as this will likely impact the design services of the holder and other consultants. Here are some ways that CM project delivery models may affect the holder's services (as compared to the more common design-bid-build delivery using a stipulated price contract such as the CCDC 2) and introduce complexity and risks:

#### 3.1 General and Administrative Items to Monitor

- Be aware that with a CM as an owner's advisor, the project team is more complex, and it is possible for the roles and responsibilities of the holder and CM to overlap and become blurred. Additionally, advice from the holder may, at times, conflict with that of the CM. This relationship and complexity can impact the level of effort required of the holder.
- Holders may have less direct contact with the owner as coordination and other communication services may be undertaken by the CM. During the construction phase in particular, the CM will often take the lead.
- In the CM for services and construction delivery model where the CM and owner have an agreement that includes shared costs savings for the work, there can be more extensive requests or recommendations from the CM to consider product/material substitutions and additional design alternatives.
- For either CM delivery model, if the owner and CM are unwilling to share a copy of their agreement with the holder, the holder's ability to perform any contract administration and related obligations will be materially undermined, including hindering of the holder's ability to understand the level of administration and coordination expected or required.

#### 3.2 Possible Impacts on Design Services Phase

- There may be more options requested during design phases as the CM considers different construction techniques and/or materials.
- In both the CCDC 5A and 5B contracts, the CM's services schedule provides the option for the CM's services to include preparing or confirming the *Construction Cost Estimate* at each phase of the design and advising the owner of recommendations for corrective action when it exceeds the *Construction Budget*. The CM's involvement in cost control during the design phase may reduce the risk of cost overruns during bidding.

- The holder's design concerns and the CM's objectives, may not always coincide; the owner will play a crucial role in making decisions and balancing priorities.

### 3.3 Possible Impacts on the Development of Construction Documents

- The preparation of some drawings is often requested to be expedited, reducing available time for coordination and checking for completeness and errors.
- The CM often requests preparation of drawing and specification packages for specific trades versus the single comprehensive set of drawings and specifications typically prepared for a single tender under the design-bid-build project delivery model. This requires more time to coordinate and modify earlier packages (e.g. site works and structural design) as the later packages get completed, plus additional printing and preparation costs. It is further noted that the quantity of drawing packages required to be prepared by the holder for the tendering process may also be subject to change by the CM and client during the pre-construction phase. It is accordingly recommended that the holder's scope of services specify the original expectations for tender drawing packages so that any changes to these expectations can be addressed as a change to the holder's services under their contract.
- The CM may wish to change Division 01 of the specifications (e.g. general requirements which set out the duties and responsibilities of the owner, CM and consultants).

### 3.4 Possible Impacts on Bidding

- Though identified during the development of construction documents, some difficulty may remain in defining the scope of contract document packages for contractors performing work for more than one trade or division of the specifications. The bid management process implemented by the CM as part of its services should clearly identify the scope of work for each trade and communicate to the holder any resultant adjustments needed within the construction documents.
- Good communication from the CM regarding the status of bidding and contract awards is essential.
- The CM and/or trade contractors will often request or suggest substitutions or alternatives to products, materials, and methods specified by the holder. The CM may present the feasibility of the change, along with any impacts, to the owner, consultants and holder for discussion. Anticipated cost savings should include any cost for changes to the holder's and its consultant's services, for example, updating the contract documents.

### 3.5 Possible Impacts on Approvals and Permit Processes

- As noted above, the roles and responsibilities of the CoP holder and CM may overlap and become blurred. This risk can arise in respect of the parties' roles and responsibilities for the management of approval and permitting processes. Address this at the project outset and include it in the project communications plan.
- Approval and permitting processes can give rise to scheduling conflicts outside of the control of the project team, including the variability of these processes for a particular project. As a result, members of the project team involved in the project's design and delivery of construction services should discuss the constraints and options for achieving the owner's requirements, such as obtaining partial or conditional permits and issuing sequential tenders.
- As changes or substitutions are considered, assessing compliance risk may also require review of anticipated timing and costs to revise approvals and/or permits already obtained by the owner.

### 3.6 Possible Impacts During the Construction Phase

- If not amended through supplementary conditions, CM at Risk project delivery under CCDC 5B provides for the *Consultant* to undertake the role of making interpretations and findings in matters relating to performance of the *Work* or the requirements of the *Contract Documents*.

Under the CCDC 17 for CM as Agent project delivery, however, it is the CM that is to make interpretations and findings in matters relating to performance of the Work or the requirements of the Contract Documents, except with respect to any and all architectural and engineering aspects of the *Work* and the *Consultant* is only obligated to give interpretations and make findings on matters in question relating to the requirements of the design.

Consider whether the construction contract, or your professional services contract, may need to be adjusted to align with client expectations.

- For CM at Risk project delivery, CCDC 5B provides for the *Consultant* to undertake the role of payment certifier for the CM's *Fee for Construction Services* and the *Work*, but not for the CM's *Pre-construction Services*.

Under CCDC 17, for CM as Agent project delivery, the CoP holder is not responsible to certify payments to be made to trade contractors as this is undertaken by the CM. As a result, the holder will have less involvement and knowledge about the project's financial progress. CCDC 17, however, still contemplates the consultant's involvement with the CM in certifying substantial performance of the work and the holder may be asked to prepare certificates of substantial performance for many separate trade contracts.

Payment certification and related services accordingly require close coordination between the architectural services and construction contracts.

### 3.7 Possible Impacts For Project Close-Out & Commissioning

- At the beginning of the project, establish who is coordinating the delivery of close-out documents and commissioning services. This may also include a 3<sup>rd</sup> party commissioning agent.

## Suggested Procedures

For projects using the construction management delivery models and associated CCDC standard form of contracts, holders should consider the following general procedures:

1. **Do your research – understand the roles, risks and other items such as the impacts on level of effort and associated fees:** Become familiar with the construction management form of project delivery, including a thorough review of CCDC guides and standard contract forms, as well as sources for additional information such as Royal Architectural Institute of Canada (RAIC), Canadian Handbook of Practice (CHOP), OAA Practice Tips, and OAA recommended supplementary conditions. Pay close attention to items such as:
  - Understanding the roles of each stakeholder and level of experience with construction management project delivery, as well as the timing of when the CM would be integrated into the lifecycle of the project, as this will affect the role/tasks of the CoP holder.
  - The potential risks for client/owner, CoP holder and construction manager.
  - The possible impacts to the architectural services fee structure and any subconsultants retained by the holder, along with any client's consultants with whom the holder may coordinate.

While you can appropriately share with your client your understanding and experience with construction management projects, remember to avoid giving legal advice.

2. **Client's Selection of CM for a Project:** To clients/owners asking about construction management, provide information, sources for additional information, and possible pros and cons of the various CM project delivery options. Remember that the determination of the project delivery method is an owner's decision. If you advise and make strong recommendations it may be seen as your decision, and your risk.

Note that for CM as Agent delivery under the CCDC 5A, with each trade having a direct contract with the owner, the owner will likely be considered the "constructor" under OHSA, unless express arrangements are made to have the CM undertake this role, such as through supplementary conditions. Remember to avoid giving legal advice while sharing your understanding and experience.

3. **Discuss the client expectations and how this will impact professional services contracts for the consultants on the team:** Coordinate the holder's services in its agreement with the client/owner with (i) the role being performed by the CM in its contracts with the owner (the CCDC 5B or CCDC 5A) and (ii) the role being performed by the holder in the client/owner's construction contracts (the CCDC 5B or CCDC 17). There may be additional, or possibly fewer, services and fees warranted for construction management projects. As it pertains to preparing contracts for professional services (e.g. OAA Contract Suite 2021), including when you engage the consultants, take time to review the scope of Additional Services as they may overlap with the CM's services. This same process should be applied to other disciplines (e.g. MEP, Structural, etc.).

In the context of CCDC 5B, discuss the likelihood that the client/owner may explore the different CM compensation options (such as the GMP Option, the GMP Plus % Cost Savings Option or the Stipulated Price Option) as this will affect the holder's services agreement, as well as the services of the other consultants on the team. Refer to CCDC 46, a guide to CCDC 5B, and related Practice Tips and other resources noted below.

4. **Consider critical items you may want to coordinate with the Owner/CM contract, including supplementary conditions:** If presented with CCDC 5A, CCDC 5B or CCDC 17 contracts by a client/owner or CM, discuss with them the impact on your professional services. Coordinate the holder's contracted services with those expected by the client/owner or CM for the project. Consider incorporation of the OAA recommended supplementary conditions in the Practice Tip corresponding to each of the CCDC contract forms as noted below. Consult a lawyer as required. Clients contemplating the use of supplementary conditions should be advised to seek their own legal counsel.

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Note: Be aware of conflicts of interest and the possible impact on your professional liability insurance (PLI) coverage if providing architectural services and construction services in respect of the same project or part thereof.

If considering taking on the CM role, be aware of the potential conflicts of interest, coverage exclusions under your insurance policies (e.g. PLI), as well as other legal and contractual responsibilities (e.g. related to being a "constructor" under OHSA, requirements under Tarion, etc.). Consult with legal and insurance advisors including, but not limited to, professional liability insurance advisors prior to taking on this role. Refer to *Architects Act*, Regulation 27, Section 43, and Practice Tip PT.26 – "Provision of Architectural Services and Construction Services – Conflict of Interest Guideline", as well as your Pro-Demnity policy, including specifically Exclusion 29. Delivery of Construction Services.

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## References

CCDC website – for contracts, including the CCDC 5B related subcontract CCA 1-2021 Stipulated Price Subcontract, and guides such as CCDC 45-2010, 46-2010 and 47-2010

PTs 23.13, 23.14, & 23.15 which discuss CCDC 5A-2010, 5B-2010, & 17-2010

PT.23.23, PT.23.24 & 23.25 which discuss CCDC 5A-2025, 5B-2025 & 17-2025

PT.26 Conflict of Interest Guideline – Provision of Architectural Services and Construction Services; including reviewing Pro-Demnity Policy Language

OAA Contracts and Guides: Services Schedules and Appendices; Guide Commentary (refer to "General" and "Delivery Method and Construction Contract")

Canadian Handbook of Practice (CHOP) Edition 3 Chapter 4.1 *Types of Design-Construction Project Delivery*

Canadian Construction Association – CCA 26-2016 A Guide to the Construction Management Method

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

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CLEAN

FOR COUNCIL MEETING

November 28, 2025

(open)

ITEM: 6.1

**President's Log**

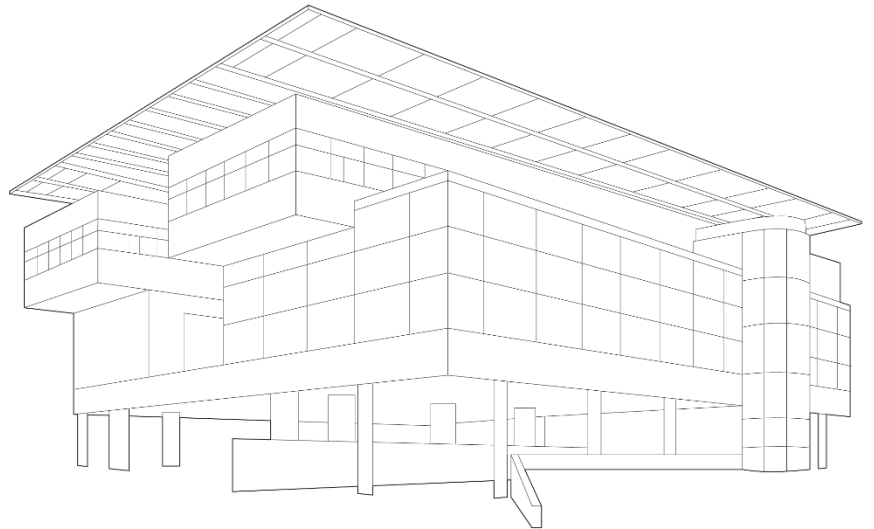
Date	Event/Meeting	Location	Attendees	Time
September 19	President/Executive Director Meeting	virtual	w/K.Doyle	8-9:00 a.m.
September 26	President/Executive Director Meeting	virtual	w/K.Doyle	8-9:00 a.m.
October 14	St. Lawrence Valley Society Visit	Kingston	w/Society Chair & members, L.McKendrick, K.Doyle	5:30-7:30 p.m.
October 15	London Society Visit	London	w/Society Chair & members, D.Ardiel, K.Doyle	12 noon - 2:00 p.m.
October 29	Governance Committee	virtual	w/Committee members	9:00 a.m. - 12 noon
November 5	Society Chairs Meeting	virtual	w/Society Chairs, Council Liaisons, K.Doyle, C. Myktyshyn	11:00 a.m. - 12 noon
November 6	Executive Director/Registrar Performance Evaluation	virtual	w/Governance Committee	noon - 4:00 p.m.
November 10	OAA/OGCA Best Practices Liaison Group	virtual	w/OGCA, T.Yeung, K.Doyle, M.Audet, T.Carfa	10:00 a.m. - 11:10 a.m.
November 12	Executive Committee	virtual	w/Executive Committee	11:00 a.m. - 12 noon
November 19	OFC Prep Meeting	virtual	w/K.Doyle, C.Mills, E.Missio	11:00 a.m. - 12 noon
November 20	Office of the Fairness Commissioner meeting	virtual	w/OFC & staff, K.Doyle, C.Mills, E.Missio	11:00 a.m. - 12 noon
November 24	Prep for November Council meeting	virtual	w/K.Doyle, C.Mills, T.Carfa	9:00 a.m. - 10:00 a.m.
November 26	Grand Valley Society Visit	Kitchener	w/Society Chair & members, B.Birdsell, K.Doyle	6:00 p.m.- 8:00 p.m.
November 27	Pre-Council Dinner	Toronto	w/Council	7:00 p.m. - 9:30 p.m.
November 28	Council Meeting	Toronto	w/Council, staff	9:30 a.m. - 2:30 p.m.
November 28	Seasonal Celebration Event	Toronto	w/Council, staff	6:00 p.m. - 11:00 p.m.

# Executive Director Report to Council

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November 18, 2025

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.2



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 the achievement of the OAA's 5-year Strategic Plan**. This report also highlights the activities of the Executive Director since the last meeting of the Council. Specifically, this report focuses on items not covered elsewhere in the meeting agenda.

## OAA Strategic Plan



### Regulatory Leadership



### Governance and Operations



### Member Competency



### Public Education

In consultation with the OAA Governance Committee, work continues on the development of the agenda for Council's annual planning session. The January session will include a focus on topics that are foundational to the Act modernization project. At the direction of the Governance Committee, Kathy McLaughlin & Associates will be engaged to facilitate the session. Also included will be a review of the achievements towards the strategic goals and objectives of the 5-year Strategic Plan and annual governance training. January 2026 signals the final year of the 5-year Strategic Plan.

As we close in on the end of the calendar year, the management team will begin preparing the year-end reports for the individual service areas and committees against the backdrop of the goals and objectives of the Strategic Plan. Progress continues to be steady and the team is looking forward to reporting out on achievements in January.



## Regulatory Leadership

### National Activities

#### ***Mutual Recognition Agreements***

Efforts have continued over the Fall regarding implementation of the updated Canada/United States Mutual Recognition Agreement (MRA). Both parties to the Agreement – *Regulatory Organizations of Architecture in Canada (ROAC)* and *National Council of Architectural Registration Boards (NCARB)* will be issuing a release on December 1 launching the new agreement. Applications under the new agreement will be accepted starting mid-January 2026.

#### ***National ExAC Working Group***

The ROAC Board approved the recommendation of the national ExAC Working Group in October to move forward with the acquisition and implementation of new examination software for item writing, item banking and test generation. The OAA will be heavily involved in this project as one of the two organizations that provide the administration services for the ExAC on behalf of ROAC.



## Governance & Operations

### Meeting with Ontario Fairness Commissioner

Along with OAA President Ted Wilson, the Registrar, and the Manager of Communications, I met with Fairness Commissioner Irwin Glassberg on November 20. The meeting was a result of outreach from the Fairness Commissioner following his presentation to the Council in June.

Fall has been an extremely busy month on the operations and administration side for the OAA. A number of key IT infrastructure projects are coming to fruition including a major upgrade to the iMIS data-based system. iMIS is the foundation for the OAA's registrant database, official online directory, continuing education transcripts, events management, experience record book as well as payment portal. Final testing will occur in the month of December with the official switch over occurring in mid-January. Staff are preparing communications as the above noted functions will be offline for a number of days while the upgrade is completed.

Staff continue to train and expand their use of the Office 365 platform, another major IT infrastructure project that was completed earlier this year.

The OAA's finance team are working with IT staff and consultants on the upgrade to GP Dynamics – the OAA's finance software – which should go live in early December. This upgrade will modernize a number of accounting and reporting functions as well as create efficiency.

OAA auditors, BDO Canada LLP have begun their pre-audit processes, and the finance team are engaged in assisting the auditors, while also preparing for the launch of fee-renewals in mid-December.

The operations team has been focused over the last few months on an audit of the building's heating and cooling system to ensure that it is running smoothly. The team has also been immersed in detailed training in regard to the operation of the systems.

The OAA Headquarters has been host to two well attended SHIFT events this fall, welcoming over 200 people to the building.

Many changes are coming to fruition now and into the new year as a result of the above work as well as requirements of the *Fair Access to Regulated Professions and Regulatory Trades Act* and the Office of the Fairness Commissioner. Additional time has been spent focusing on updating of general information of the website, various applications, policies and procedures, as well as other documentation.

Annual performance evaluations were completed over the fall months for all staff.



## Public Education & Awareness

### **Relationship Building**

The OAA hosted the fall meeting of Engineers, Architects, & Building Officials (EABO) at the OAA Headquarters on November 14. OAA President Ted Wilson and I attended.

OAA Executive Committee met with the Chairs of the Pro-Demnity Board of Directors on November 13 for the semi-annual meeting between the two groups. Pro-Demnity President & CEO Bruce Palmer will be attending the January meeting of Council to present specific information and initiatives.

The Association of Registered Interior Designers Ontario (ARIDO) has begun their search for a new Executive Director. I met with ARIDO's outgoing Executive Director, Sharon Portelli in early November who is transitioning out of the role. Once a new Executive Director is in place, I will reach out for a meeting.

### **Construction & Design Alliance Ontario (CDAO)**

On November 12 the CDAO issued a press release announcing the launch of its first *Guide to Design and Construction Procurement Best Practices*. A copy of the release is attached. Each member organization has posted information to their website and are actively promoting the Guide. This document will play an important role in furthering the strategic objectives of the CDAO as well as the OAA regarding public education and awareness. Efforts will begin shortly to organize the next CDAO Procurement Day which is planned for spring 2026.

The OAA hosted the CDAO Annual General Meeting at the OAA Headquarters on September 23 followed by the Fall Forum meeting. As a member of the CDAO Board I attended on behalf of the OAA along with OAA Manager Policy & Government Relations.

Attached: CDAO Release: *Guide to Design and Construction Procurement Best Practices*.

## FOR IMMEDIATE RELEASE

### **Building Ontario Together: A New Guide to Strengthen Public Infrastructure Delivery**

*Construction and Design Alliance of Ontario Offers Practical Procurement Solutions for Public Owners to Improve Infrastructure Delivery.*

**Toronto, ON – [November 12, 2025]** – The federal and provincial governments have continued to send a strong signal of commitment to investing in and building infrastructure. Turning those commitments into real projects requires modern, efficient, and coordinated procurement practices.

The Construction and Design Alliance of Ontario (CDAO) has released its first *Guide to Design and Construction Procurement Best Practices*, a landmark resource developed by leaders from Ontario’s construction, design, residential, and municipal engineering sectors. The Guide provides practical recommendations for public owners to strengthen how infrastructure projects are planned, procured, and delivered.

Ontario faces a significant infrastructure backlog while preparing for more than \$250 billion in new capital investments over the next decade. However, fragmented procurement practices are slowing progress, leading to costly delays, inefficiencies, and missed opportunities.

“Governments at every level are saying the same thing: we want to build,” said Nadia Todorova, CDAO Chair. “This guide is about helping them do just that - by giving public owners the tools to deliver projects faster, more efficiently, and more sustainably.”

*The Guide to Design and Construction Procurement Best Practices* offers a clear roadmap to modernize Ontario’s approach to infrastructure delivery and foster stronger collaboration between industry and government.

#### **Key recommendations include:**

- **Standardize contracts and specifications:** With 444 municipalities using different systems, standardization cuts red tape, reduces disputes, and speeds up project delivery.
- **Pre-plan projects and communicate early:** Clear objectives and early collaboration between industry and government prevent costly changes and delays.
- **Choose the right procurement model:** Match the approach – Design-Bid-Build, Design-Build, Construction Management at Risk, or Integrated Project Delivery – to the project’s needs.
- **Manage risk appropriately:** Assign risks to the parties best able to handle them and consider long-term, life-cycle impacts.

- **Foster a culture of change:** Embrace collaboration, innovation, and flexibility while maintaining transparency and accountability.

“Ontario’s construction and design community stands ready to help governments deliver on their infrastructure promises,” added Nadia Todorova, CDAO Chair. “This guide represents the collective expertise of Ontario’s builders, designers, and public owners working together to build better.”

The Guide is designed as a living document that will evolve as industry standards and practices advance. It serves as a practical, accessible resource for municipalities, provincial agencies, and all public-sector buyers seeking to modernize procurement and improve project outcomes.

[Read the Procurement Guide.](#)

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### **About the Construction & Design Alliance of Ontario (CDAO)**

The Construction & Design Alliance of Ontario (CDAO) is a coalition of Ontario’s leading construction and design associations. Together, CDAO members plan, design, build, operate, and maintain most of the province’s public and private infrastructure – employing hundreds of thousands of Ontarians and driving billions in economic growth.

### **About the Author**

The Guide was written by Bruce G. Matthews, P.Eng, a retired professional engineer with extensive engineering, regulatory, and association management experience. Most recently, Bruce served as the Executive Director for the Association of Consulting Engineering Companies – Ontario (ACEC-Ontario) from 2018 until his retirement in 2023.

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### **Media Contact:**

#### **Nadia Todorova**

Chair, Construction & Design Alliance of Ontario  
[info@cdao.ca](mailto:info@cdao.ca)

# Office of the Registrar Statistical Report

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FOR THE PERIOD SEPTEMBER 4 TO NOVEMBER 12, 2025

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.3

PRESENTED BY

**Christie Mills**

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Ontario Association  
of Architects

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

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

The report also provides statistical information regarding:

- OAA membership and OAA status composition.
- Licence 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.

- Three (3) assessments were undertaken during the reporting period.
- Four (4) assessments are planned, or dates are being scheduled. One assessment is for an applicant using international experience gained prior to enrollment in the IAP (IAP-CI) and the other three are related to exemption requests to Council.

Reporting Period Assessments – Sept 4 to Nov 12, 2025			
	Reason	Result	Deficiency
ERC Recommendation to Council			
ERC Determinations	IAP-CI	Met the requirements	
	IAP - D	Does not meet the requirements	Deficiencies in <ul style="list-style-type: none"> <li>• Bidding and Procurement Procedures</li> <li>• Building Code</li> <li>• Field and General Review</li> </ul>
	IAP - D	Met the requirements	

*CI: applicant using international experience gained prior to enrolment in IAP*

*CY: Currency*

*IAP-D: Internship in Architecture CERB deficiency.*

At each committee meeting, the Chair leads discussions on potential areas for review and improvement in the ERC process. Many questions have been refined to better align with the competencies being assessed, the use of standard deviation in the panel scoring matrix has been validated, and the development of an applicant ERC intake form is planned for the new year. The Committee plans to meet November 19 to continue their consideration of process improvements in accordance with the OAA's Regulatory Leadership goal of the Strategic Plan.

## 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 <sup>1</sup>	16
Total Complaints Opened During Period	3

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

Active Complaints with a CC Panel	3
Held in abeyance	0
Preliminary Review Stage	0
Closed	
Not referred (dismissed)	1
Not referred (withdrawn)	0
Not referred (caution)	2
Referred to Discipline	1
Registrar’s Investigations <sup>2</sup>	0
Good Character Investigation	0

## 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 of Sept 4 – Nov 12, 2025:

1. There are ten (10) matters to be scheduled in 2025 – although three may proceed as a combined hearing in accordance with Section 9.1 of the *Statutory Powers Procedure Act* (TBD).
2. One (1) case was heard during the reporting period on November 7, 2025.

The Office of the Registrar plans a full review of all Discipline Committee policies and procedures in accordance with the Regulatory Leadership goal of the strategic plan.

## 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 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.

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

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. During this reporting period independent legal counsel reconfirmed the Chair's position on the scheduling of hearings.

The Registration Committee statistics for the reporting period are as follows:

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

## Act Enforcement

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

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

It is an offence for an unlicensed person (including a corporation) to use the term "Architect" 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	21
Active files/ Ongoing investigations	10
Resolved by Legal Counsel	0
Resolved by OOTR for reporting period	9
Unable to locate	0
No breach found	2
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](#) (FARPACKTA) 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.

The OAA submitted its 2024 RICF report to the OFC March 10, 2025; the report is posted to the [OAA website](#) as per the FARPACTA requirements.

### FARPACTA Recent Amendments

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

Legal Obligations	In-Effect Date
<b>Third party accountability:</b> 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
<b>Alternative documentation:</b> 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
<b>Parallel processing plan:</b> 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
<b>Registration time standard:</b> 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.

For OAA purposes it is reasonable to expect the OFC will consider the CACB, ROAC (ExAC) and NCARB (AREs) to be third party service providers to the OAA. The OFC has planned a webinar featuring regulators and third parties that have worked together on negotiating

FARPACTA compliant agreements, scheduled for September 22, 2025. The OAA has engaged SML to draft MOU templates for sharing with the OAA's TPSPs. These drafts have been shared, and we are awaiting feedback.

### **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.

Following Council's September 2025 review and approval, the OAA's draft Alternative Document Policy was shared with OFC staff for preliminary review and feedback. Feedback was received October 1, 2025, which indicated that the Policy addressed the FARPACTA requirements and included a best practice recommendation as follows:

*For greater clarity, OAA may wish to include in the Alternative Document Request Form:*

*“Other” as an additional option in the list of alternative documentation types that the applicant wishes to submit. This will enable individuals to list other alternatives that were not considered when creating this form or may emerge in the future, and in that manner save the OAA from costly reviews of this document in the future.*

*Additionally, OAA may wish to include in its third-party agreement with the Canadian Architectural Certification Board (CACB), expectations related to the consideration of alternative documentation, as it is the CACB that assesses academic credentials.*

OAA staff can incorporate the suggested edit to the form. The CACB does have an Alternative Documentation Policy.

### **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 Council's September 2025 review and approval, the OAA's draft Parallel Processing Plan was shared with OFC staff for preliminary review and feedback. Feedback was received October 2, 2025, which indicated that the Plan addressed the FARPACTA requirements in all but one area where the requirement was considered only partially met. Specifically, the requirement for robust communication and information resources for applicants. To address this deficiency the OFC suggested the following:

*With regards to ensuring applicants have the necessary information, the OAA has acknowledged deficiencies in its current communications with regards to opportunities to seek recognition of international work experience. Given the scope of the plan and these past challenges with clear and effective communication, the OFC suggests developing a robust communications and change management plan, including consultation and engagement with applicant facing groups. This is a best practice associated with successfully implementing major change initiatives.*

In response to this advice, OAA Communications Manager, Erik Missio, has expanded the communications information in the Plan to incorporate a specific section as follows:

### **Communications and Outreach**

*Recognizing the importance of having equitable registration plans with concurrent processes, the OAA appreciates this is only of benefit to those wishing to practise architecture in Ontario if they are fully aware of all the options and opportunities and provided with access to thorough, transparent information. The Association is committed to implementing clear and proactive communication plans for any approved proposals.*

*Such outreach plans are being developed to ensure both existing registrants and those on the path to licensure are fully informed of the steps being taken by Council to respond to provincial legislation, the options available to individuals should they encounter delays or barriers in their licensing journey, and the broader measures the OAA is pursuing to support fairness, transparency, and efficiency in the registration process.*

*As cited elsewhere in this plan, data from a recent survey indicated a lack of awareness of current and past opportunities for seeking recognition of international experience. For example, large numbers stated they were unaware they could submit supervised post-graduate international experience gained prior to IAP enrolment or that they wished the information had been made clearer when they themselves were going through the process. This insight on what would have been helpful will now prove invaluable for the next generation of applicants. The OAA can use all this feedback to shape any new resources and continue to reach out to this group should more information or advice be needed.*

*To ensure timely communication with individuals, applicants and members, the OAA intends to immediately push out communications messaging once its parallel processing plan is approved by the Fairness Commissioner, outlining next steps and how it will continue to communicate to stakeholders the relevant issues. The goal is to ramp up communication and information dissemination in a manner that enables individuals to make informed choices about the order in which they complete requirements. For outreach to members and to the wider public, the Association employs a range of methods that will be tailored toward this topic.*

### **OAA Website**

*Continually updated information will be made available in the [International Credentials and Mobility](#) section of the website, with direct, clear links to the [Becoming a Licensed](#)*

[Technologist](#), [Becoming an Architect](#), and [Provincial Fair Access Requirements](#) sections. Encompassing updated webpages as well as new Frequently Asked Questions (FAQ) sections and clear contact information for the Office of the Registrar, these newly enhanced pages will include, but not be limited to, enhanced guidance on the ability to write the NCARB AREs to avoid potential delays. (For this example, the new material would be posted and shared shortly after March 2026 or the Fairness Commissioner’s approval of the parallel plan.) The OAA Website itself is a “living document,” which would be continually updated.

Beyond the webpages, OAA staff would also update various existing pdfs and other online documents to ensure information is available. One example includes the [Mentorship Guide](#), which was created for those in the IAP and OTP programs, as well as those Supervising Architects and Mentors supporting them. Ensuring that not only the individuals with international education, but also their Mentors are aware of the available options increases the likelihood one can make an informed decision.

The OAA would also create a pdf “handbook” for internationally educated individuals looking to become licensed in the province, bringing together various pieces of information from the OAA Website into one succinct document. Having a centralized digital document that could be easily printed allows the OAA to quickly share pertinent information about parallel processes and other aspects.

#### **Direct Email Notifications and E-newsletters**

The OAA will send Regulatory Bulletin emails to all those who hold status with the Association, including Intern Architects, Intern Technologists, and the individuals serving as Mentors or Supervisors, to ensure everyone is aware of previously existing options and any new changes. Such regulatory emails are sent through the Association’s iMIS database, which strengthens the likelihood recipients will see the message. This ensures that those who have unsubscribed from regular OAA email communications will still be sent the information.

Using the same process, targeted emails can also be sent to specific groups, such as more in-depth messaging for people with international education or work experience or emails specifically to those in the OTP, acknowledging the potentially simplified exam eligibility after the March 2026 Council meeting. Further, emails could be sent to Mentors and Supervising Professionals, directing them to share the info with those who would benefit from the information.

In addition to the special Regulatory Bulletins, the Association regularly sends OAA News (biweekly), Practice Advisories (bimonthly), and intern news (quarterly). These e-newsletters would also have regular reminders specific toward the parallel processing plan and international mobility, with links to more information.

#### **Social Media**

The OAA will be sharing more information on the parallel processes and, more generally, international mobility, across its social media channels—most notably on LinkedIn, but also in Instagram stories and Facebook. A social media calendar of evergreen posts is in development—it will include various pieces of regulatory information, some of which will have a focus on licensing and registration that explores options for international and provincial mobility.

#### **Local Architectural Societies**

*Located in 14 communities across Ontario, the Local Architectural Societies are the regional chapters of the OAA, providing opportunities for dialogue between the profession and the wider architectural community. The Societies—examples include the Toronto Society of Architects, the Ottawa Regional Society of Architects, and the Northwestern Ontario Society of Architects—work to raise the awareness, appreciation, and understanding of architecture within their communities. Beyond OAA registrants, their membership also comprises those who hold no official status with the Association, and may include internationally experienced architects looking to become licensed in Ontario.*

*The OAA would share the new information with the Society Chairs and explore ways those individual groups can also engage in outreach with their local communities.*

### **Videos**

*The OAA regularly records continuing education videos for its members before posting them on a [YouTube Channel](#) for free, on-demand viewing by not only the membership, but also the wider public. Along these same lines, a new instructional video would be produced that is dedicated to licensure and international mobility. It would explore the various items related to this path to licensure, including validity of experience, mobility, parallel options, and information sources. Links to this video would be shared through the previous channels listed above, as well as shared directly with other relevant groups. For example, the OAA offers support related to licensing information for JVS Toronto’s [Immigrant Professionals Leveraging Architectural Knowledge for New Opportunities \(IPLAN\)](#) employment and practice courses. In addition to ensuring the new parallel processes and international mobility material is shared directly with participants, the new video would also be provided.*

Time and resources will be required for all the proposed initiatives within the Parallel Processing Plan, and should the Fairness Commissioner approve the Plan, staff will bring to Council for review and approval each of the planned initiatives.

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As a follow up the Fairness Commissioner’s attendance at a Council meeting earlier this year, a meeting between the President and the Commissioner is planned for November 20, 2025.

The Office of the Registrar, the Policy and Government Relations Manager and the Executive Director will continue to monitor the ongoing developments under FARPACTA.

### **Ontario Labour Mobility Act (OLMA) and Bill 2**

Recent amendments to the *Ontario Labour Mobility Act (OLMA)* under Bill 2 – *Protect Ontario Through Free Trade Within Canada Act, 2025* introduce new requirements aimed at improving the timeliness, transparency, and fairness of licensing processes for professionals certified in other Canadian jurisdictions.

The legislation imposes strict timelines for regulators: they must acknowledge receipt of a complete application within 10 days and issue a certification decision within 30 calendar days. Given the longstanding ROAC reciprocity agreement for Architects in Canada, the OAA is in compliance with the 30-day standard (which is also required under FARPACTA).

Another key feature is the introduction of “deemed certification,” which allows individuals already certified in a reciprocating jurisdiction to be recognized as certified in Ontario for a

one-time, six-month period upon submission of their credentials and satisfaction of any prescribed conditions.

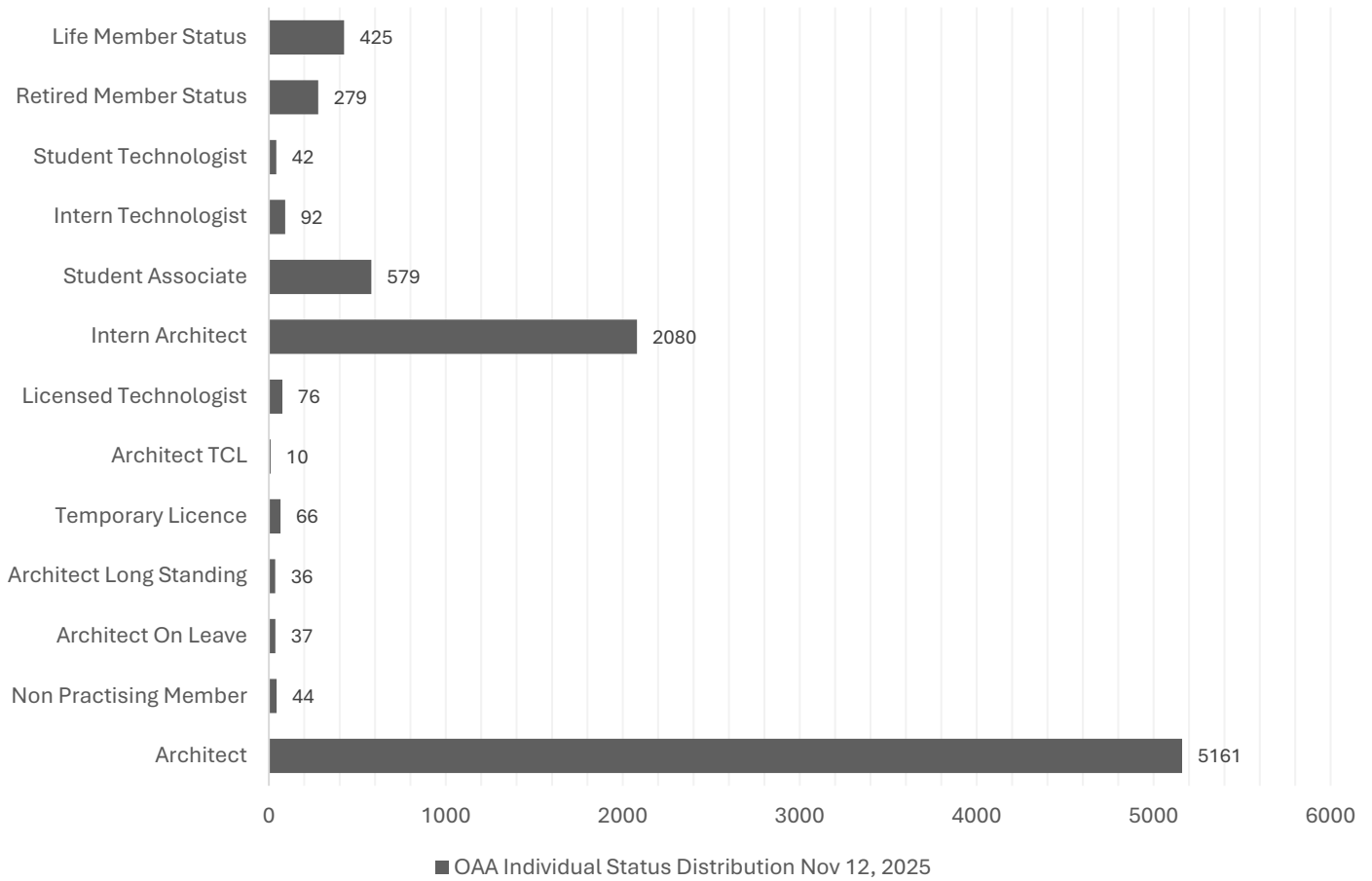
OAA staff have prepared the necessary administrative procedures that are required for deemed certified applicant status within the OAA's registration processes. The September 1, 2025 provincial press release can be found [here](#).

# Office of the Registrar Statistics

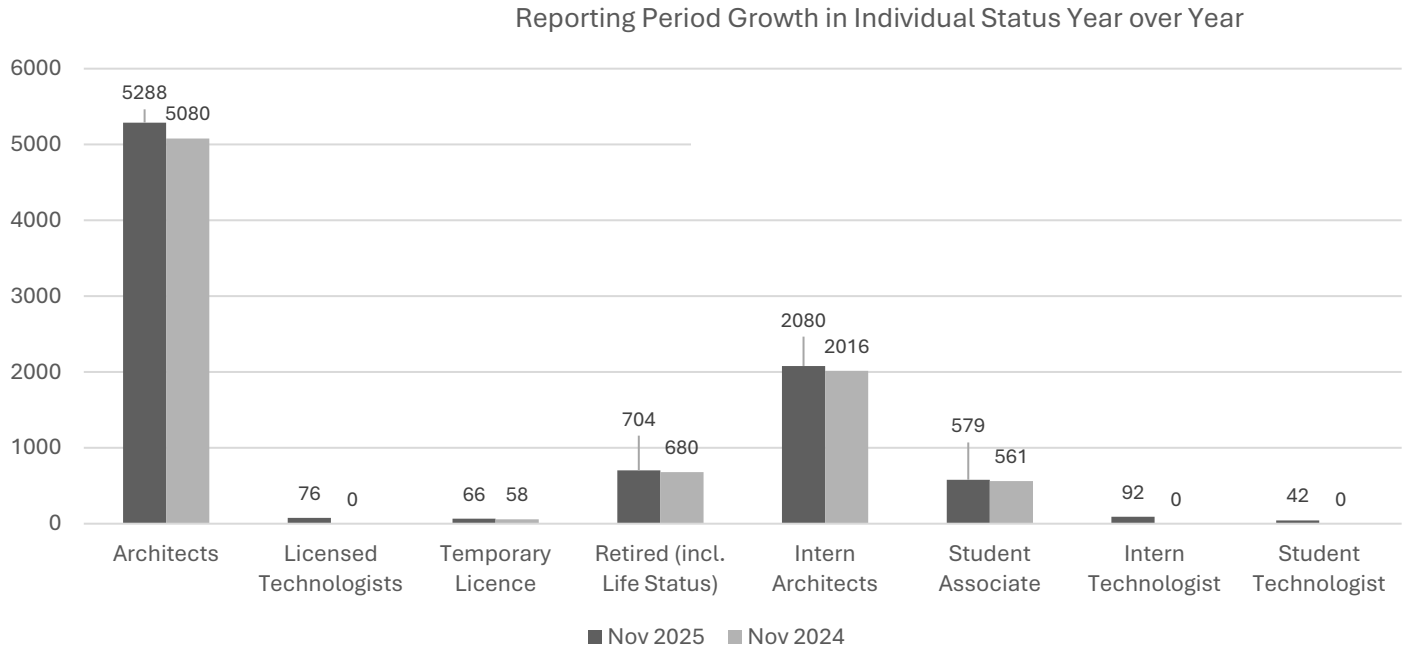
Below are the OAA community statistics for the reporting period, indicating current records as well as changes over the year. The OAA community includes members as defined by the *Architects Act* as well as prescribed as classes of persons whose interests are related to those of the Association as defined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

## OAA Members and Status Holders

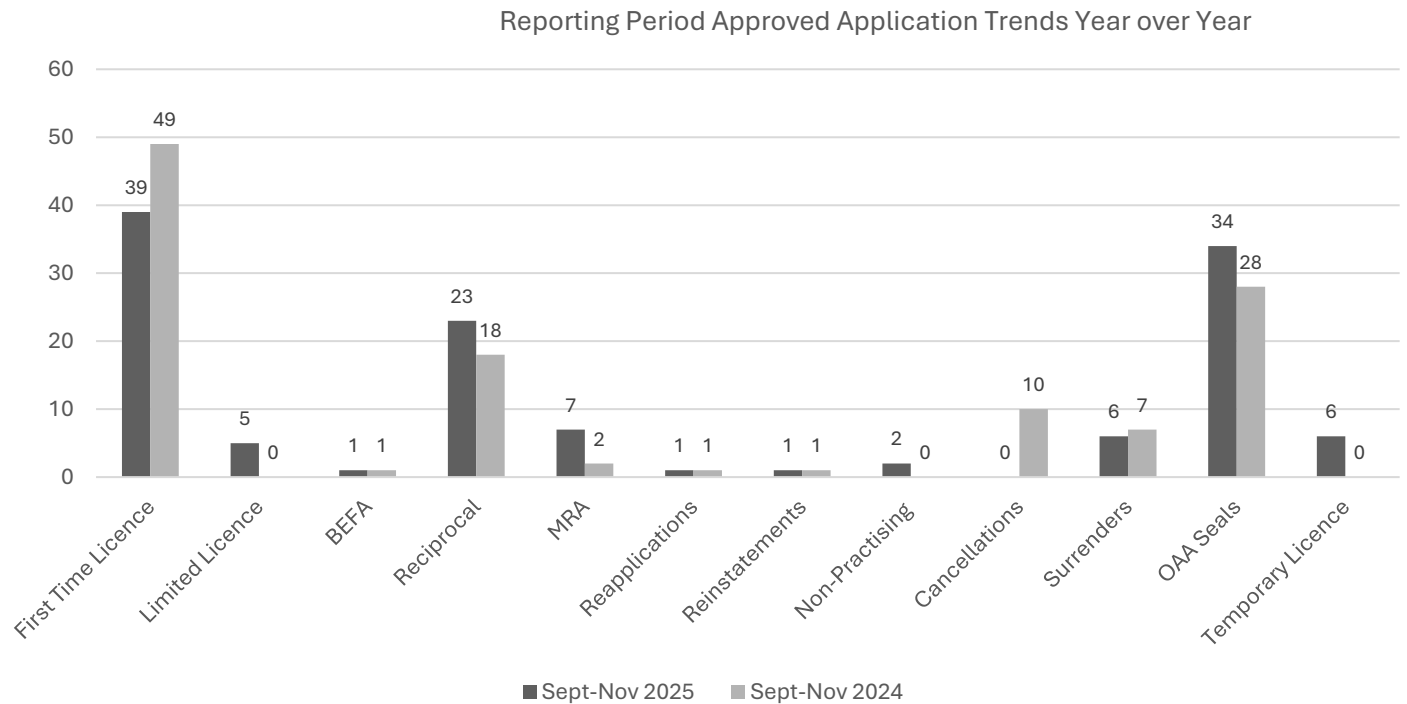
OAA Individual Status Distribution November 12, 2025



## Growth in Individual Status



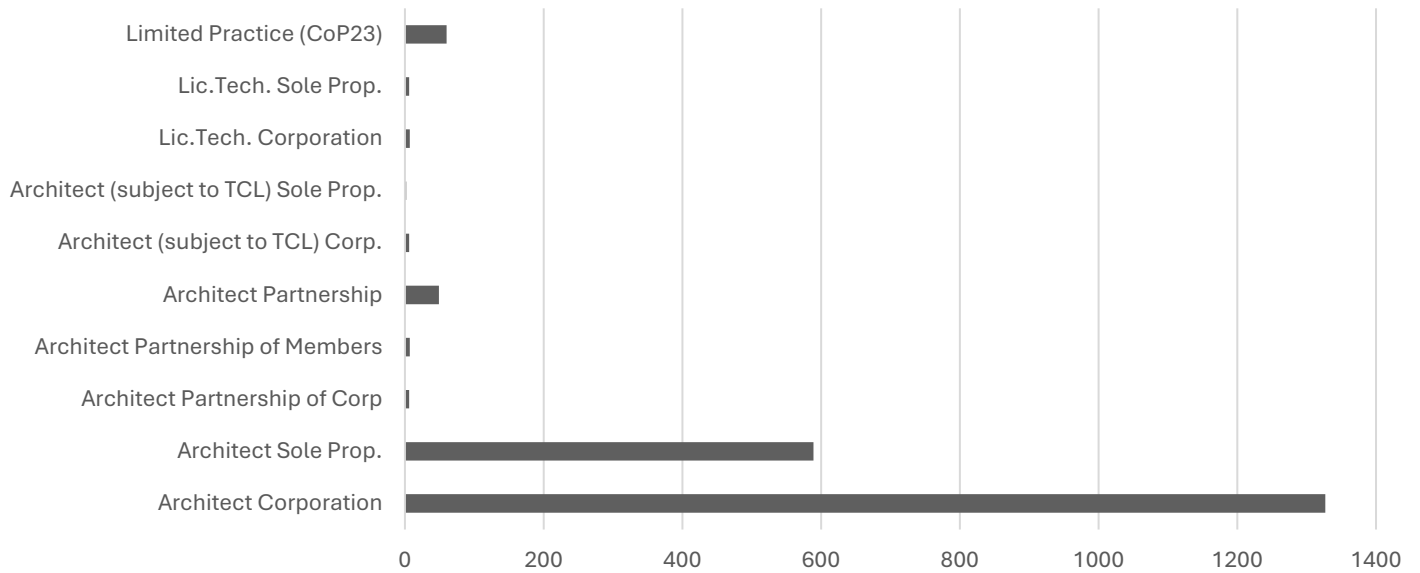
## Licence and Limited Licence Applications



- Total applications received for the reporting period was 68, total approved 72.
- Of the 26 first time licence applicants, 8 were internationally educated applicants.

# Certificate of Practice

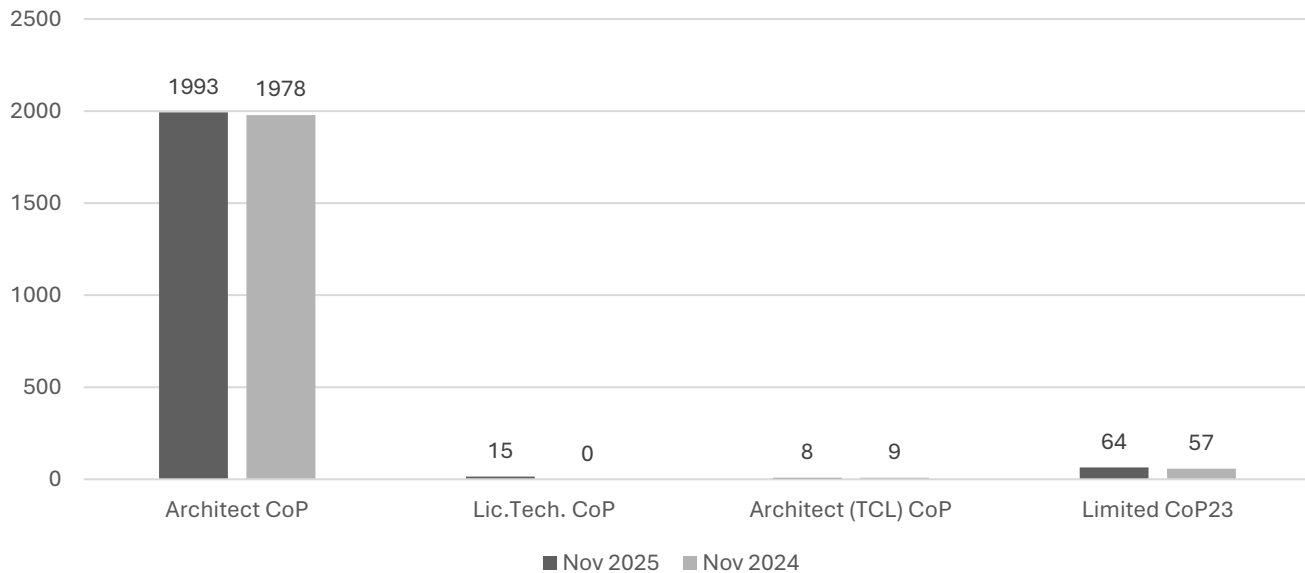
OAA Certificate of Practice Distribution as of Nov 12, 2025



\* TCL refers to "subject to terms, conditions, and limitations"

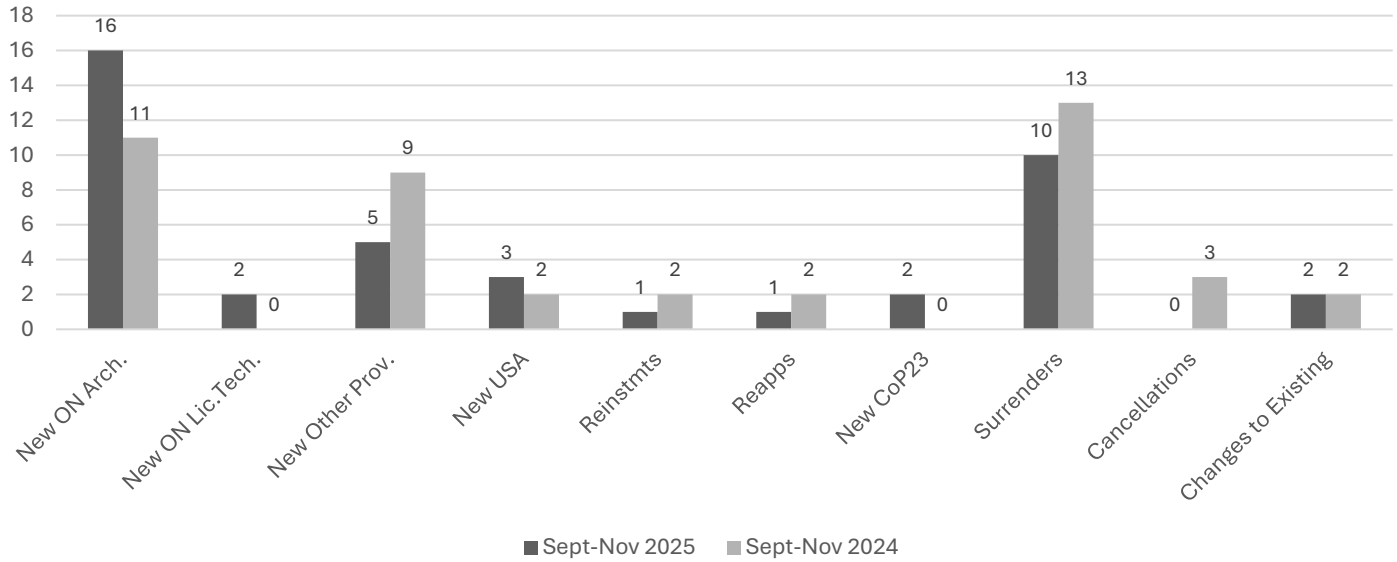
# Growth in Practices

Reporting Period Growth in Practices Year over Year



# Certificate of Practice Applications

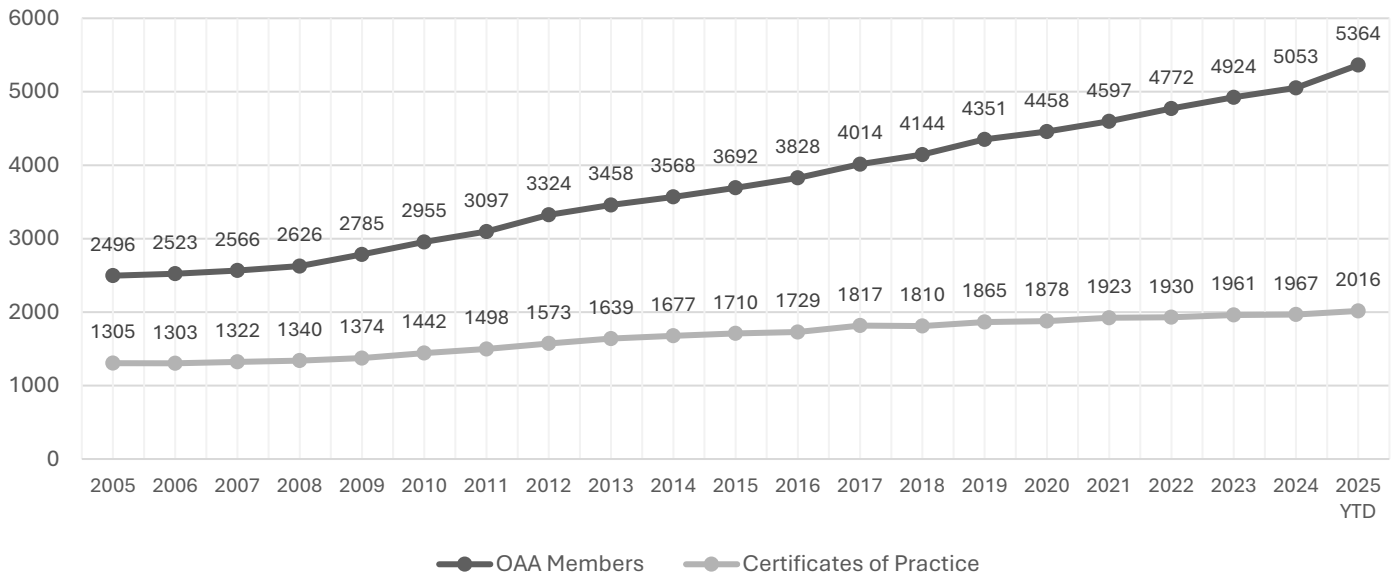
Reporting Period Approved CoP Application Trends Year over Year



- Total CoP applications received for the reporting period was 39, total approved 32.

## Long Term Trends

Growth in Membership - Twenty Year Trend



# 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 Speigel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.4.a

**From:** Communications and Public Education Committee (CPEC)

Susan Speigel, Vice President & Chair	
Mariella Amodio	Pearl Chan
Kurtis Chen	Jon Hobbs
Carl Knipfel	Elaine Mintz
Brigitte Ng	

**Date:** November 14, 2025

**Subject:** General Update from the Communications & Public Education Committee

**Objective:** To provide an update on CPEC initiatives since the September Council meeting.

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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.

## Public Awareness Funding

The Committee met virtually on October 3 to review applications for funding from organizations across Ontario, with the goal to allocate \$40,000 to deserving projects that

promote public awareness and appreciation of architecture. The Committee noted this round there was, unfortunately, a conspicuous absence of climate-oriented projects.

The funds were allocated as follows:

Urban Minds Planning and Design Studio	<b>1 UP Conference</b> - A youth conference that brings together secondary school students across Ontario to celebrate and incubate city-building ideas.	<b>\$5000</b>
The Architectural Conservancy of Ontario Inc.	<b>ACO Heritage Awards</b> - An annual celebration recognizing excellence in heritage restoration, adaptive reuse, advocacy, and architectural craftsmanship across Ontario's historic built environments.	<b>\$5000</b>
Laurentian University – MacEwen School	<b>Archi-North Workshops</b> - Introductory sessions to architectural representation and tools for high school students across Ontario.	<b>\$5000</b>
Building 22	<b>Building 22 Student Publication - Edition 25</b> - An annual student-initiated publication highlighting the works of undergraduate and graduate students from the Azrieli School of Architecture & Urbanism at Carleton University in Ottawa, Ontario.	<b>\$1500</b>
Canstruction Toronto	<b>Canstruction Toronto 2026</b> - An annual design competition, bringing together the design and engineering community to build sculptures with canned goods. Contributions go to the Daily Bread Food Bank.	<b>\$3000</b>
Ottawa Architecture Foundation	<b>Designing a Better City</b> - A panel discussion exploring design leadership, policy, and building better cities.	<b>\$2500</b>
Espanola Public Library	<b>Espanola Walking Tour</b> - A walking tour highlighting historically significant buildings in Espanola, offered in guided, self-guided, and virtual formats.	<b>\$4000</b>
Actual Media Inc.	<b>The Brownie Awards 2025</b> - An annual recognition event celebrating individuals and organizations who transform contaminated and underused brownfield sites into vibrant residential and commercial developments.	<b>\$3000</b>
winterstations inc.	<b>Winter Stations</b> - An annual free international design competition and public art exhibition held along Toronto's eastern beaches.	<b>\$7500</b>
YNOT Services	<b>17<sup>th</sup> Annual Youth Potential Recognition Award Gala</b> - A youth-focused educational initiative empowering children from low-income families through interactive programs that foster awareness, career inspiration, and engagement with architecture and the built environment.	<b>\$3500</b>

### Society Project Funding (formerly Special Project Funding)

As part of the discussion at the August and October CPEC meetings, the Committee reviewed and considered areas of possible improvement to the application, administration, and evaluation processes of the funding program for Local Society projects that go above and beyond regular operations. The Committee focused on improved **transparency, predictability, effectiveness, and clarity** for applicants and evaluators alike.

Further details are available in a separate memo.

## Awards Jury Selection

In anticipation of the 2026 OAA Awards season, CPEC members generated a shortlist of candidates for both the **Design Excellence** and **Service Awards juries**. From that list, the following jurors have been secured for the 2026 awards season:

### Design Excellence

**Paul Cravit**, Principal Emeritus, CS&P Architects

**Nathalie Dion**, Principal, Provencher Roy

**Carol Moukheiber**, Associate Professor, University of Toronto & Principal, Studio (N-1)

**Lola Sheppard**, Architect and Professor, University of Waterloo & Principal, Lateral Office

**Tyler Walker**, Principal, MJMA Architecture & Design

Facilitator: **Mary Ellen Lynch**, Principal, Lynch + Comisso Architecture + Light

### Service Awards

OAA Council Representative – TBD

**Amy Lin**, Principal & Founder Suulin Architects

**Craig Race**, Principal, Craig Race Architecture & Founder of Lanescape

**Tim Wickens**, Chair, London Society of Architects

Facilitator: **Camille Mitchell**, Architect, SVN Architects + Planners

Jurors will convene at the OAA Headquarters in late-February 2026 to review all eligible submissions and decide on award recipients. More details are available on the OAA

Website: <https://oaa.on.ca/whats-on/awards/2026-oaa-award-juries>

## Ends of Terms and Foundations for the Incoming Committee Cohort

During their November 14 meeting, CPEC members took the opportunity to reflect on the committee's development since its inception in 2023 and lay some groundwork for new members joining in 2026.

### Ongoing Improvement to the OAA Website and UX

CPEC has discussed the value of exploring a user experience (UX) audit and improvements given the central importance of the OAA website as a public communication tool. Until such a time as a more fulsome UX audit is possible, OAA staff continue to make improvements where possible (such as a refreshed homepage), relying on input from the Committee. Using a public lens, CPEC members identified ongoing pain points on the OAA website at their November meeting and shared possible areas of focus for OAA staff.

Key suggestions include:

- Continue finding ways to improve the search function
- Identify and remedy any stylistic inconsistencies between pages to ensure brand compliance
- Ensure responsive/mobile formats maintain proper functionality

### Suggested Priorities for 2026

CPEC members also took the opportunity in their final meeting to identify priorities to be considered by the incoming cohort. Numerous ideas were brainstormed, all of which centred around a few core themes:

- Continuing to leverage relationships and build a coalition of allies working to achieve similar public outreach goals
- Continue finding meaningful ways to foster knowledge transmission between established and emerging professionals
- Exploring additional avenues and resources to support and amplify existing programs/projects offered both by the OAA and external allies
- Continuing to build understanding between and across OAA service areas to ensure alignment in messaging and strategic outreach objectives

### **Other Items for Information**

- In order to gain a more fulsome understanding of the OAA public education efforts, CPEC invited staff from both the Policy and Government Relations team and the Practice Advisory Services team to present to the group about how those service areas support and advance the OAA Public Outreach Plan.
- CPEC was very pleased to learn that this year's Queen's Park Picks event—led by the Policy and Government Relations team with guidance from PACT—has garnered over 10 million media engagements online.
- The OAA Headquarters has been featured on a new online platform called Toronto Biosphere Eco-City (a member of the national association Biosphere Eco-Cities Canada (BECC)). View the profile at: <https://toronto.bioecocity.org/project/oaa-headquarters-renew-refresh-renovation/>

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### **Action**

None. For information only.

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### **Attachments**

None.

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# Memorandum

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Elaine Mintz	Deo Paquette
Anna Richter	Kristiana Schuhmann
Susan Speigel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.4.b

**From:** Governance and HR Committee

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

**Date:** November 3, 2025

**Subject:** Update from OAA Governance & HR Committee

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

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

## **Act Modernization**

The Committee received an update from the Registrar and Executive Director regarding the work on the Act Modernization project. The Governance Committee prioritized several items to be brought forward for Council to discuss at the annual planning session in January. The Committee will continue to report to Council on a regular basis.

## **OAA Society Finances and Governance**

The Committee continued its discussions regarding specific aspects of society governance with a view to providing support and additional resources to societies to assist in their administration. It was noted that the new Council Policy re. Society Finances was reviewed with the Society Chairs in September and will be presented to Council for approval in November.

### **Member and Practice Survey**

The Committee received an update on the administration of the comprehensive survey of both Members and Practices, which was conducted from Sept 9 - 30, 2025. The survey consultant, [Innovative Research](#), is in the process of finalizing the survey reports. The Council Working Group is reviewing the draft summary results/report which will be shared with Council and then published to the membership. The Council Working Group is comprised of Vice Presidents Speigel and Yeung, along with Councillors Richter, Ardiel, Alkasawat, and Zawadzki.

### **Annual Planning Session**

The Committee discussed the preliminary format and agenda for the Council's Annual Planning session in January 2026. The Committee agreed that the focus of the Annual Planning Session will be on the Act Modernization. It will also include updates on the OAA Strategic Plan, and legal counsel will conduct the annual training session on Good Governance.

### **Workforce Planning and HR Updates**

The OAA is fully staffed at this time.

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### **Action**

None. For information only.

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### **Attachments**

None

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# 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 Speigel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.4.c

**From: Building Committee**

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

**Date:** November 3, 2025

**Subject:** Update from OAA Building Committee

**Objective:** To provide Council with an update on the activities of the Building Committee

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The last Building Committee meeting was held on November 3, 2025.

## OAA Landscape Project

The Committee received an update on the status of the Landscape Project from the OAA Team, including Lara McKendrick and Client Advisor, Joe Lobko. The final design and budget were approved by Council at the September Council meeting. The Team has been addressing the construction schedule, as well as materials and lighting since September.

## Facility Assessment

It has been approximately 5 years since [OAA HQ's Renew and Refresh Project](#) was completed. With the agreement of the Building Committee, a Facility Assessment began this summer by WSP in partnership with Architect David Fujiwara, Siemens, Plan Group, and OAA staff. This assessment aims to ensure the optimal performance of the HQ heating and cooling systems. This is key to achieving net-zero performance. Resulting recommendations have/are being implemented and tested and will continue to be monitored. An early outcome is the implementation of a new daily report provided to OAA Operations staff for the analysis of daily changes in heating and cooling requirements.

## Net Zero Building Performance

In the spirit of achieving Net Zero performance for the OAA Headquarters, an annual assessment is conducted. The results demonstrated that the building is very close to hitting that target.

To help achieve the net zero target and maintain the building at optimal efficiency, the following has been completed in 2025:

- Due to a weather event, four of the roof top solar panels were no longer functioning, resulting in less power generation over the summer. The non-functioning solar panels have been replaced,
- Non-operational electrochromic windows were replaced in the summer. A new tracking system has been implemented to ensure the functionality of the daylight sensors that control the electrochromic windows.
- Several actuators on the geothermal system required replacing. A temporary solution was put in place until the work could be completed; however, that consumed more power than usual, which impacted hydro usage.

The building is continuing to perform at a level and is just shy of net zero - the difference reflects approximately the energy usage required for one incandescent light bulb. As we continue to strive for net zero, OAA staff will continue to investigate potential energy use reductions.

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### Action

None. For information only.

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### 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
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Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.4.d

**From:** Thomas Yeung, Vice President & PRC Chair

**Date:** November 17, 2025

**Subject:** Practice Resource Committee (PRC) - Update.

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

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## Activities Report – Practice Resource Committee (PRC)

Practice Resource Committee had its fifth meeting of 2025 on Thursday, October 2 and the sixth (and final) meeting on Thursday, November 13. The meetings were conducted in-person and focused on the following key items:

### General Updates:

Members were briefed on the September 2025 Council meeting and advised of the upcoming meeting in November 2025.

Staff provided a brief update on the [CSA Access Program](#) for the 2025-2026 period, including preliminary stats for the period June 1 to Oct 15.

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 November 2025.

Public Consultation - OBC Rapid Transit: An OAA Advisory Group has been formed to respond to a public consultation on proposed OBC changes. The submission is being finalized by PAS & Policy Staff for the November 20 deadline.

[Practice Consultation Services](#): The Annual Report for the 2024-2025 period was presented to PRC at the November meeting. Refer to Attachment 1 for additional information.

## 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. Refer to the December 2024 Council memo entitled “*OAA Document Maintenance - Practice Tips Impacted by OBC 2024*” for reference.

Updates to [PT.36.1 \(Energy Modelling\)](#) – PRC members were thanked, and their compiled comments and draft outline were shared with the Advisory Group for next steps.

Updates to [PT.36.3 \(SB-12\)](#) was published on the website and shared with the members via the Practice Advisory Newsletter.

Updates to Practice Tip [PT.38 OBC Part 5, Environmental Separation - Durability](#) (OBC Impacted Resource) – PAS is reviewing Pro-Demnity’s late-summer feedback on PT.38 and refining the draft. PRC updates are expected in the new year.

### **Resources Impacted by Amendments to the *Construction Act*:**

PAS, with the support of Policy & Government Relations (PGR) service area, continues to monitor updates to the *Construction Act* to prepare for the amendments to affected OAA resources, in particular the PT.10.0 series as well as the OAA Contracts & Guides.

### **Resources Impacted by the Launch of the New CCDC Contracts on CM**

Staff, with the support of PRC, legal counsel, and input from Pro-Demnity continue to work on updates on Practice Tips in the [PT.23 Series](#) on construction management.

PAS provided updates on the development of a new Practice Tip on CCDC 5B-2025. Refer also to November 2025 Council Memo entitled “*OAA Document Maintenance - Practice Tips Impacted by CCDC Contract Changes: Updates to Practice Tip PT.23.2*” from Vice President & Chair, Practice Resource Committee.

### **Various OAA Documents – Work in Progress (refer to Attachments)**

[OAA-OGCA Take Over Procedures \(Document 100-2025\)](#): The updated version of the document was launched in collaboration with OGCA on Monday November 3, 2025.

RFP and SofQ Templates (PRC Workplan 2025): 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) and [OAA Model Procurement Document](#) (Statement of Qualifications)

Updates to PT.39.1 (RFP Language) – refer to June memo entitled *OAA Document Maintenance: Updates to Practice Tip PT.39.1* (June 10, 2025): Following the October meeting, PAS and Communications explored several approaches to tables of content and indices to streamline access to the content of PT.39.1’s lengthy attachment. A brief presentation was given and PRC feedback will guide the next steps.

Updates to [Practice Tip PT.12 Residential Clients](#): PRC has been invited to review the final draft. It is expected to be presented to Council in the new year.

General Discussions in anticipation of future updates to [Practice Tip PT.13 Use of Surveyor's Documents](#) and [Practice Tip PT.01 When a Client Changes Architects – Different Client or Project](#) were conducted with PRC.

Other General Practice Topics/Emerging Issues Discussed:

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

[Use of AI in Practices](#): The PRC and PAS continue 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.

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**Action**

None. For information only.

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**Attachments**

Attachment 1: Practice Consultation Services Program - Report for Practice Resource Committee – September 1, 2024 to September 30, 2025

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# Practice Consultation Services Program

Report for Practice Resource Committee – September 1, 2024 to September 30, 2025

*Updated October 31, 2025*

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# Table of Contents

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Overview of 2024-2025 Report to PRC ..... 3  
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## Background on the Program

The OAA [Practice Consultation Services](#) (PCS) program, set out as a “practice review program” in s. 52 of [Regulation 27](#) under the [Architects Act](#), is part of the process allowing the architecture profession to continue its privilege of self-regulation.

The program is administered by the Practice Advisory Services (PAS) team with the support of the Executive Director and Registrar as well as the oversight of the Practice Resource Committee (PRC).

- PRC serves to fulfill the role and responsibility of the Practice Review Committee, which is required to oversee the administration of the OAA’s Practice Consultation program in accordance with s. 52 of Regulation 27 under the *Architects Act*. (Refer to PRC’s Terms of References for additional detail.)

To help practices maintain competency and currency, it includes a mandatory Practice Consultation Questionnaire—an online audit that requires architectural firms to review their office processes as they pertain to regulatory requirements and best practices. Some of the questions have a link to a relevant Practice Tip, Regulatory Notice, or section of the CHOP, so that the questionnaire can also serve as both an educational and support tool for practices. The participation of the selected member essentially constitutes a ‘health-check’ to remind practices of various regulatory requirements so that they remain in compliance.

- All OAA practices must complete the questionnaire within their first year of receiving their Certificate of Practice.
- After that, every OAA practice is required to complete it once every 10 years, as this is mandatory for maintaining a Certificate of Practice (CoP).
- Members are required to complete the questionnaire within one month of receiving it.

The questionnaire covers the following topics:

- marketing and promotion;
- client agreements/contracts;
- consultant agreements/contracts;
- accounting and bookkeeping issues;
- records and files;
- personal supervision and direction as well as quality assurance;
- legal; and
- project management and delivery of services.

For each OAA certificate of practice (CoP), an Architect or Licensed Technologist (usually the owner/principal or someone in charge of the practice work) is required to complete the questionnaire at least once every 10 years. Non-compliance can lead to referral to the Practice Resource Committee, for review and consideration of further action, which could result in an on-site review or referral to the Registrar or Complaints Committee. For further details, please consult the OAA’s [Policy](#) document which is available on the OAA website.

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## Overview of 2024-2025 Report to PRC

This report serves as an update to PRC in regard to key highlights of the Program for the Sept. 2024 to Sept. 2025 period.

Key updates to the program have also been shared with Council via semi annual reports by the PAS Manager:

- [Report – Practice Advisory Services \(June 1, 2024 to December 31, 2024\)](#), dated January 14, 2025 and
- [Report – Practice Advisory Services \(January 1, 2025 to May 31, 2025\)](#), dated June 10, 2025..

This report presents:

- Key updates related to the administration and operations of the program
- Key statistics from September 2024 to September 2025
- Key feedback received by practices that completed the questionnaire
- Key take-aways

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## Updates on Operations of the Program

- Since the launch of the updated platform in August 2024, the online questionnaire has been integrated with OAA's iMIS database. This allows for:
  - further automation of the program operation and
  - consolidation of all data related to this program in one place.
- The program used to be run 12 months a year; following internal discussions regarding past experience, while the questionnaires are generally sent out on a monthly basis, the month of December is typically skipped as it is a shortened month as a result of holiday office closures. It should also be noted that planned IT maintenance of the OAA database may periodically require a month to be skipped.

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## Statistics / Key Observations for this Cycle

### September to December 2024

This period represents the pilot/testing phase of the integration of the online PCS questionnaire with the OAA's iMIS database. Minor adjustments were made during this phase to improve the process as well as refining the messaging for the selected user. The table below indicates the total number of questionnaires sent out this period.

2024	Total number of Questionnaires sent out	New Practices	Practices in 10 year cycle
September	16	8	8
October	10	5	5
November	24	13	11
December	N/A (skipped due to holiday closures)	N/A	N/A
<b>Total</b>	<b>50</b>	<b>26</b>	<b>24</b>

Of the 50 questionnaires sent out, all 50 questionnaires were completed.

- 2 practices received communications from PAS for not completing the questionnaire within the 1 month period. Following the correspondence, the questionnaires were completed.

### January to September 2025

In this period, the program operation continued to run smoothly with the integration to the iMIS database, while some planned IT maintenance required the months of August and September to be skipped. The table below indicates the total number of questionnaires sent out this period.

2025	Total number of Questionnaires sent out	New Practices	Practices in 10 year cycle
January	16	14	2
February	30	22	8
March	22	10	12
April	15	12	3
May	14	14	0
June	18	18	0

July	31	31	0
August	N/A (skipped due to IT maintenance)	N/A	N/A
September	N/A (skipped due to IT maintenance)	N/A	N/A
<b>Total</b>	<b>146</b>	121	25

- Of the 146 questionnaires sent out, 1 practice did not complete it, as their CoP was surrendered the month the questionnaire was received. An exemption was requested accordingly.
- 5 practices received communications from PAS for not completing the questionnaire within the 1 month period, whereby 2 of these practices had requested an exemption to complete it at a date beyond the deadline. These questionnaires were then completed.

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## Participant Feedback / Key Observations

As part of the questionnaire, members are given the opportunity to provide any comments regarding the questionnaire that they have just completed. In this reporting period, most participants provided some feedback. These comments are recognized as being important to help identify potential adjustments to improve usability, clarity and value of the questionnaire.

The comments received from the participants can be grouped in the following three categories (including some examples pulled from submitted questionnaires)

- A) Suggested amendments where a question or response options are not applicable to the practice:
  - *More options in answers would give a higher accuracy of answers. For example mostly the choice was "always", "occasionally" or "never", an option for "most of the time" should be added.*
  - *As a sole practitioner (no employees) some questions are irrelevant and do not provide N/A as an option. Entire survey seems to be designed with multi-person architectural practices in mind*
  - *Some questions I found difficult to answer because they haven't been part of my experience to date so to answer "always, never or occasionally" was really not applicable*
- B) Access to completed questionnaire as a resource:
  - *I am wondering if I will have access to the questionnaire and my answers after completion as a resource. I suggest that the OAA add a note at the beginning confirming if members will have access to the questionnaire and their answers after completion.*
- C) Value of the questionnaire:
  - *The survey and reference documents Regulatory Notice and Practice Tips are very useful for our practice. They remind us of the potential risks that need attention in practice.*
  - *The Practice Review Program Survey is a well-structured and valuable tool for assessing compliance with OAA regulations and professional obligations. To further enhance its risk management focus, the survey could include additional questions on Consultant Coordination & Risk Mitigation and Professional Liability Insurance.*

Participant comments will continue to be monitored by PAS to ensure an appropriate review of the suggestions is facilitated with the relevant parties.

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## Questionnaire Results / Key Observations

Overall, practices are providing responses that reflect, at a minimum, an understanding of best practices and regulatory requirements relevant to the topics addressed in the consultation. In many cases, these responses also demonstrate active adherence to those standards. This indicates that the questionnaire is functioning as intended—effectively assessing both awareness and implementation of key practices.

With respect to regulatory requirements, the three questions that received the highest percentage of responses deemed least suitable are as follows:

1. How long do you retain your practice's financial records? (Question located in the Accounting and Bookkeeping section of the questionnaire)
2. If asked to review/or give an opinion of another holder's work, was the holder notified of your review before it began? (Question located in the Personal Supervision and Direction/Quality Assurance section of the questionnaire)
3. Does the architect responsible for general review of the project review and sign all of the site review reports? (Question located in the Management of the Project and Delivery of Services section of the questionnaire)

With respect to best practices, the three questions that received the highest percentage of responses deemed least suitable are as follows:

1. Where the client retains the other consultants directly, does the practice take steps to coordinate the client/consultant contract(s) with the client/holder contract for compatibility? (Question located in the Subconsultant Contracts section of the questionnaire)
2. Does the practice have a written office policy in place with respect to Federal Privacy (PIPEDA) Legislation? (Question located in the Legal section of the questionnaire)
3. Do you submit permit applications as the "Authorized Agent of the Owner"? (Question is located in the Management of the Project and Delivery of Services section of the questionnaire)
  - a. Note that the referenced Practice Tip PT.08 Participation in the Permit Process, that discusses this issue, was recently updated in March 2025.

Participant responses will continued to be monitored in this regard, as these observations serve as an opportunity for PAS to explore the use of the Practice Newsletter to remind members of the resources associated with these questions, as well as opportunities to improve the current OAA resources.

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## Key Take-Aways

- **IMIS Updates:** An office-wide migration of the OAA iMIS database to an iMIS cloud-based system (EMS) has been planned and is underway. Therefore the PCS online questionnaire and database migration to the EMS cloud-based system has been planned and is in progress. PAS continues to support this process with planning and testing activities. The migration process may require that the issuance of questionnaires be skipped for a short period of time towards the end of 2025 and/or early 2026.
- **Ongoing general maintenance:** PAS continues with regular maintenance and administrative tasks related to the program, including regular review of the questionnaire to ensure it is up to date with any changes in legislation and changes to referenced resources (e.g. updated Regulatory Notices and Practice Tips).

- Continue to improve user interface: Comments received from some participants regarding technical user experience issues when completing the questionnaire will be reviewed with IT (e.g. the functionality of the back button).
- Continue to explore how questionnaire can respond to some of the member feedback received: Based on PAS review of the participant comments and responses, it seems that when a question is deemed not applicable to a practice, and N/A is not a response option, the participants are unclear as to how to answer. In this case, the intent is that the participant answers the question according to the course of action they would likely take under these circumstances. PAS to look at how this can be clarified in the questionnaire.
- 
- Data contributing to member competency: In parallel, PAS continues to explore how the analysis of the data can be used, for example to:
  - inform the preparation of PAS resources for potential updates
  - inform any required communications to broader membership, such as the Practice Advisory Newsletter,
  - Liaise with OAA's Continuing Education Service Area for any recommended educational topics

# 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
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Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 6.4.e

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

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

**Date:** November 4, 2025

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

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

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PACT met last on October 14, 2025 and will meet again on November 25. The October 14 meeting was set up to confirm final details and day-of logistics for the 2025 Queen's Park Picks event. More details about PACT's work included below.

- **2025 Queen's Park Picks Event:** The 2025 Queen's Park Picks (QPP) event was held at Queen's Park in Toronto on October 21, 2025. Attended by approximately 25% of MPPs or their representatives, as well as featured building Architects and client groups, the event was a positive experience for everyone who participated. Some of the highlights of the event include:
  - Formal remarks delivered by the Honourable Doug Downey, Attorney General of Ontario, MPP Kristyn Wong-Tam, Official Opposition Critic of the Attorney General, MPP Lucille Collard, Liberal Critic of the Attorney General, MPP Mike Schreiner, leader of the Green Party of Ontario, and Settimo Vilardi, Immediate Past President.
  - An estimated 10.5 million media impressions gained through earned media coverage that resulted from the media releases that the OAA publicized when the 2025 QP picks were revealed. All the media

coverage was positive in tone. This is a significant increase from the previous year where there were approximately 600,000 media impressions gained through earned media coverage.

- From October 21 to 31, there were 678 unique visits to the QPP page on the OAA website and each visitor spent approximately 1 minute and 11 seconds on the site. This is a significant increase from the previous year wherein there were 96 unique visits to the site and each visitor spent approximately 36 seconds on the site.
- Meetings with individual MPPs and the OAA, including myself, Settimo Vilardi, Sara Trotta and/or Elizabeth Walsh, have been ongoing since the spring and the focus of the meetings is on advancing the Association's recommendations to fix Ontario's broken Site Plan Approval process apropos the findings [the 2024 Altus SPA report](#). MPP meetings to date include:
  - MPP Matthew Rae, Chief Government Whip and Parliamentary Assistant to the Minister of Municipal Affairs and Housing
  - Staff from the Minister of Red Tape Reduction's office
  - MPP Catherine McKenney, Official Opposition Critic of Housing
  - MPP Mike Schreiner, Leader of the Green Party of Ontario
  - MPP Tyler Allsopp, Parliamentary Assistant to the Minister of Economic Development, Job Creation and Trade

OAA staff will continue to arrange MPP meetings throughout the remainder of this sitting of the Legislature. The House rises for the winter holidays on December 11, 2025. The 2025 Queen's Park Picks can be found on the [OAA website \[https://oaa.on.ca/queens-park-picks/queens-park-picks-2025\]](https://oaa.on.ca/queens-park-picks/queens-park-picks-2025) along with photos from the evening reception.

- **Bill 60, *Fighting Delays, Building Faster Act, 2025*:** Bill 60, *Fighting Delays, Building Faster Act, 2025* was introduced on October 23, 2025. This sweeping omnibus bill contemplates amendments to many existing Acts, including the *Construction Act* and the *Planning Act*.

A time allocation motion on this proposed Bill passed on November 6, 2025, meaning that the Bill will pass through an expedited legislative process which truncates the public's opportunity to comment via a Committee as it the usual process with legislation.

As such, a decision was made in collaboration with OAA President to issue a statement on this legislation including:

- Support for the proposed amendments to the *Construction Act* that decouple annual release of holdback from lien expiry by creating a

clearer timeline for payment of holdback on an annual basis and restoring the existing (and separate) timelines for lien preservation, perfection and expiry;

- Support for the contemplated regulation-making authority to the Ministry of Municipal Affairs and Housing (MMAH) under the *Planning Act* to allow variations to be permitted “as-of-right” from additional prescribed performance standards (e.g. height) on specified lands (e.g. urban residential lands);
- Support for the contemplated exemption of all Official Plan amendments that authorize residential uses on all the lands within a Protected Major Transit Station Area (PMTSAs) from Ministerial approval under the *Planning Act*, to bring them more quickly into force; and,
- Strong cautions to government about the importance of maintaining “enhanced development standards – lot level (outside of buildings),” until it integrates green standards into Ontario’s Building Code.

The statement was published on November 11, 2025, and can be read in full on the OAA’s GR Portal [here](#). It will also be circulated to OAA members via the November 20 issue of OAA News

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**Action**

None. For information only.

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**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
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Susan Spiegel	Settimo Vilardi
Edward (Ted) Watson	Thomas Yeung
Marek Zawadzki	

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 7.1

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

**Date:** November 13, 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).

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The fall semi-annual meeting of ROAC was held on October 18 in Montreal.

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 following key items were included on the agenda of the October 18 Board meeting.

## **Standing Committee Reports**

### *International Mobility Committee (IMC)*

IMC Chair Scott Kemp attended the meeting 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 European Union** is still pending, however the staff at Global Affairs are preparing for final approval in Parliament this fall. It is anticipated that a reciprocal approval will be received

from the EU Parliament by the end of the year. With this final administrative step complete, both parties will then be able to accept applications.

Following the implementation of the **MRA between ROAC and the ARB (Canada-UK)**, the following certificates and applications have been received (the AIBC is the secretariat) as of August 27:

- 8 outgoing applicants (4 AIBC Registrants)
- 56 incoming certificates from ARB
  - o 42 have submitted applications
    - 18 pending payment/course completion
    - 24 complete
      - 13 list AIBC as intended jurisdiction.

It is anticipated that the updated **MRA between Canada and the US** will be in place in early January 2026.

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

#### ***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 updated Terms of Reference for the CEXAC were approved by the Board as presented.

The ROAC Board approved the recommendation of the national ExAC working group regarding the acquisition and implementation of new software related to the examination item writing, banking, and test generation. ROAC will receive a update on that work in the spring.

#### ***ROAC CACB Working Committee (RCWC)***

Don Sterritt, Chair of the Working Committee, attended virtually. The CACB draft 2026 Budget was presented and subsequently approved by the Board. This was Don Sterritt's last meeting as Chair as former OAA President, John Stephenson will assume this role moving forward.

Updates on the following items were also provided:

#### ***ESDC (Employment Social Development Canada) Funding***

On behalf of ROAC the RCWC was successful in securing a ESDC grant for the following work:

1) Considering that some jurisdictions may be removing the requirement for Canadian experience prior to becoming registered as an architect, alternatives to the BEFA six-month work experience requirement will be considered.

2) Develop a workshop which will assist BEFA candidates in navigating the application process.

Both portions of the work have begun with a completion deadline of January 2027

#### *ROAC Nominations for the CACB Board*

The RCWC put three names forward for vacancies on the CACB Board:

Darryl Condon AIBC- ROAC Representative 3 Year

Settimo Vilardi OAA- ROAC Representative 2 Year

Chintan Virani OAA- Considered for ROAC/ CCUSA Joint

The Nominating Committee met on September 21, 2025 and the three names put forward were recommended to the CACB Board as well as the CCUSA nominee, David Theodore.

#### *Status of proposed changes to the Conditions & Terms for Accreditation*

Discussions between the RCWC and the Writing Committee continue with respect to potential changes to the Conditions & Terms for Accreditation. The next meeting is scheduled for November. This work is a result of the most recent CACB Validation Conference.

#### *CACB Bylaw Review*

A review of the CACB bylaw is underway. The RCWC has provided feedback and additional comments. The process continues.

#### **2026 ROAC Budget**

The 2026 ROAC budget and accompanying schedules were presented to the Board for consideration. Following review and discussion, the Board moved to recommend approval of the budget to each of the ROAC member jurisdictions. That approval process is underway. OAA Council will consider the budget as a component of the OAA's general operating budgets as it relates to annual contributions required from each jurisdiction.

#### **ROAC Strategic Plan**

ROAC's inaugural Strategic Plan is now available on the ROAC Website. The Board reviewed a draft Action Plan for 2026 under the new Plan which will

continue to evolve. Under the pillar of Good Governance, each of the Committees has been tasked with a review of their current terms of reference for consideration of the Governance Committee.

### **ROAC Headquarters**

Upon incorporation, British Columbia was designated as ROAC's registered office, with the office of Norton Rose Fulbright serving as the official address. Given the Ordre des architectes du Quebec is now providing the administrative secretariate for ROAC, it was agreed to relocate the registered office to Quebec. The necessary filings will be submitted to Corporations Canada and the electronic corporate records, and ROAC's bank account will be moved to Quebec for ongoing administration.

### **CACB Report**

CACB President Robert Bateman and Executive Director Mourad Mohand-Said joined the meeting virtually and made a short presentation to the Board on the latest activities of the CACB. A copy of the Report is appended to this Council package under separate cover.

### **Action:**

This report is for information.

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### **Attachments:**

None

FOR COUNCIL MEETING  
November 28, 2025  
(open)  
ITEM: 7.2



## CACB-CCCA Latest Activities

Prepared for the Regulatory Organizations of Architecture in Canada (ROAC) Board Meeting.  
Montréal, QC, October 18, 2025

Mourad Mohand-Said <sup>B.Arch, M.Sc.A, Hon. MRAIC</sup>

September 28, 2025

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## 1. RECENT ACTIVITIES

### BOARD'S ACTIVITIES

#### 2025 Board Meetings:

The Board has held its third of four meetings virtually on September 26, 2025. The final meeting of the year will be held in person in Toronto, ON, on November 21–22, 2025.

#### Update of the Conditions and Procedures for Accreditation:

A special meeting of Members was held on August 14, 2025, to address the stalled work of the Writing Committee on the CES and Conditions for Accreditation. Members agreed that progress requires renewed collaboration between the Writing Committee and the ROAC Working Committee, with the CACB Board acting as facilitator. Action items include circulating the draft updated Conditions with consolidated feedback and scheduling a joint meeting to resolve outstanding issues. The meeting concluded with consensus on this path forward.

#### Update of the By-law.

The CACB has now received comments and suggestions on the proposed By-law updates from the ROAC–CACB Working Group. These have been shared with CCUSA to obtain their position, ensuring that all perspectives are fully considered before finalizing the document. CCUSA's feedback is expected following their meeting on October 3, 2025.

#### CACB 2026 Budget Approval

On August 15, 2025, the Treasurer forwarded the proposed 2026 Budget Package to the Chair of CCUSA and the Chair of the ROAC–CACB Working Group (on behalf of ROAC) for their review and approval. The Treasurer highlighted that the proposed budget, which integrates the agreed-upon 2025–2030 Accreditation Funding Agreement, includes a 10% reduction in Academic Certification and ECA fees, a 2.5% CPI adjustment to operational expense lines to reflect inflation, and continued alignment of expenditures with strategic and program priorities. Members are asked to confirm their approval by **October 31, 2025**, ahead of the November Board Meeting.

#### Call for Nominations Board of Directors

A call for nominations for four Directors was 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).

The four names forwarded by the Members to the Nominating Committee were confirmed at its meeting on September 22, 2025. The appointees will be submitted by the CACB for election by the Members at the 2025 AGM, planned for the end of October.

## PROGRAMS OPERATION

### ACCREDITATION PROGRAM

#### Program Highlights:

##### Call for Nomination for Visiting Team Members

The five nominations received from CCUSA, following our call for at least 10 educators, are insufficient to complete the renewal of our educator roster. Despite outreach through our December newsletter, LinkedIn, and direct emails to all CCUSA members in late January, additional educators are still required.

##### 2025 maintenance accreditation visits

The visits to the M. Arch programs at the University of British Columbia and the University of Manitoba have been completed. At its June 13–14, 2025 meeting, the Board rendered the following accreditation decisions:

- UBC: Accredited for a three-year term, effective July 1, 2025, through June 30, 2028.
- University of Manitoba: Accredited for a six-year term with a Focused Evaluation at the end of three years, specifically on the following Conditions and Student Performance Criteria: A6. Urban Design and D1. Comprehensive Design.

The continuing accreditation term is effective July 1, 2025, through June 30, 2028, with the Focused Evaluation to be conducted in 2028.

##### 2026 maintenance accreditation visits

Planning is underway for the 2026 accreditation visits, which will include; Toronto Metropolitan University (TMU), University of Toronto, McGill University, and Université Laval.

The Visiting Team Chairs for the four teams were appointed by the Board at its June 2025 meeting. The APR submissions, received on time on September 15, 2025, are currently undergoing the Team Chairs' completeness check. At the November 2025 Board meeting, the composition of the Visiting Teams will be finalized and approved by the Board.

##### Revision of the 2017 edition of Procedures for Accreditation

In June 2025, the CACB Board of Directors approved revisions to the 2017 Procedures for Accreditation. All programs are required to use this revised edition. Effective July 2025, the revised 2017 edition has been shared with all accredited programs and posted on the CACB website. The revisions incorporate the hybrid format for accreditation visit agendas and clarify certain sections to improve overall procedural guidance.

##### 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:

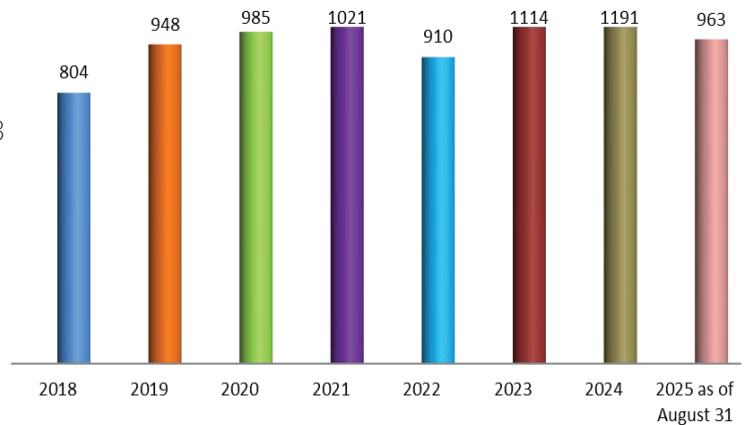
- Redesigning training materials for program heads, team chairs, and visiting teams to specify both virtual and on-site components.
- Developing Guides for both Programs and Visiting Team Members
- Introducing virtual sessions, similar to NAAB's open office hours, to provide programs with an opportunity 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

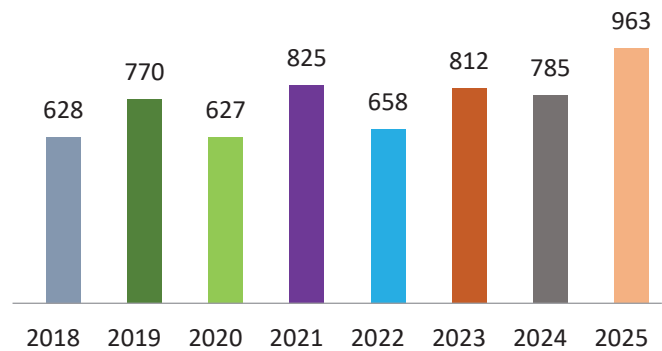
### Statistic Highlights

#### Applications Received

An average of 996 applications per year were received for all modes of Academic Certification between 2018 and 2024.

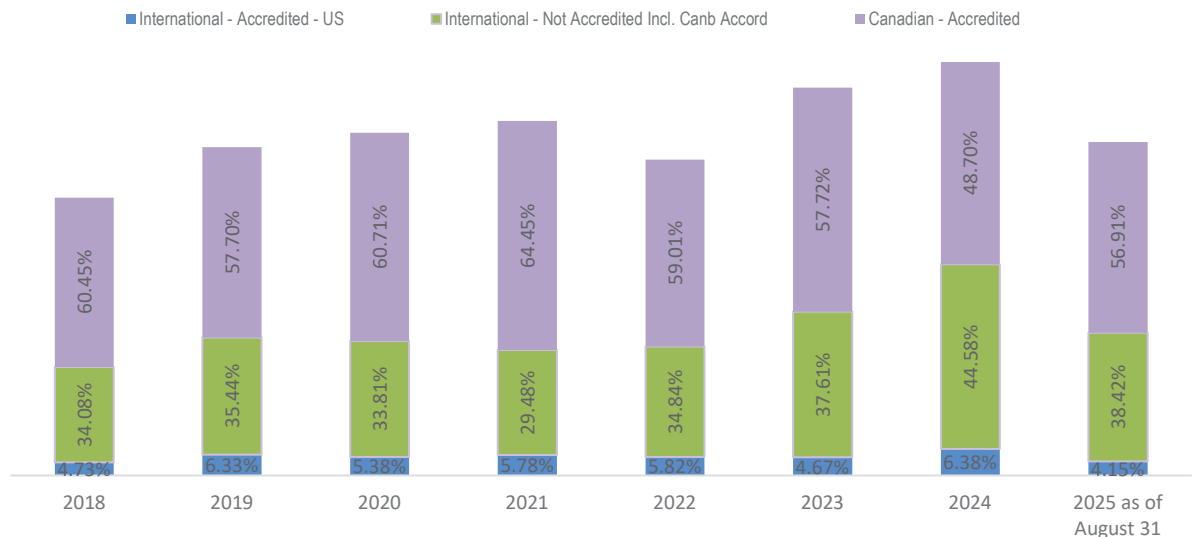


According to the end-of-August figures in the table, the 2025 year-end numbers are expected to be higher than those of 2024.



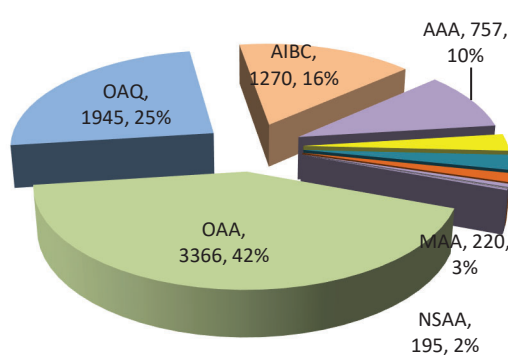
#### Applications Received by modes of certification

On average, **41%** of CACB Academic Certification applications received between 2018 and 2025 were from international graduates, including those from the USA, while **58%** were from Canadian-accredited applicants, and **1%** from the other modes of certification

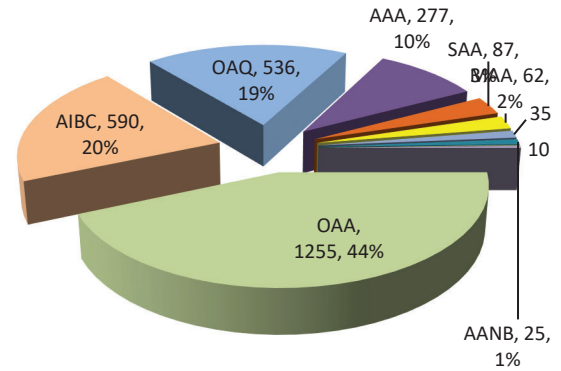


### Applications Received by Jurisdiction

Ontario (44%), British Columbia (20%), Québec (19%), and Alberta (10%) are the most sought-after jurisdictions for international applicants.



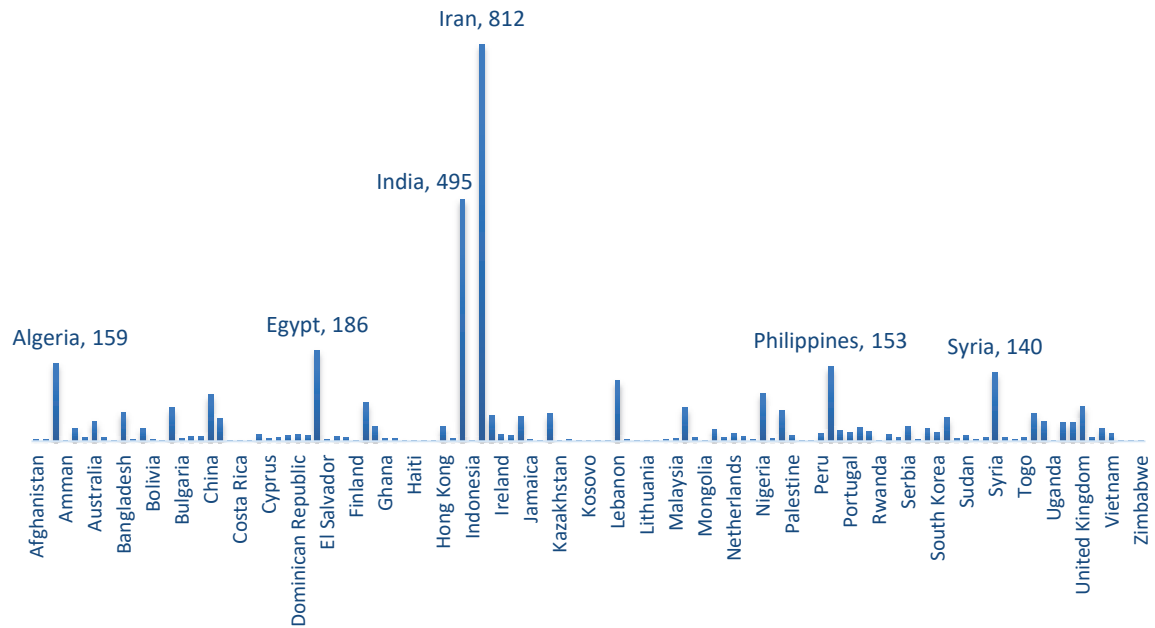
All applicants



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

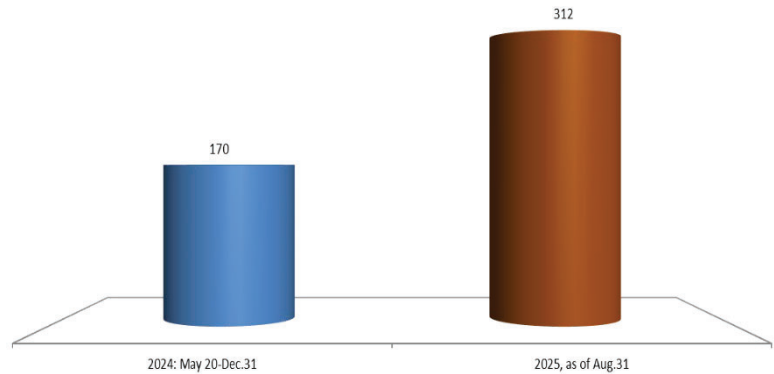
Effective May 20, 2024, the CACB is recognized by IRCC as the professional body to issue [educational credential assessments](#) (ECAs) for architects interested in immigrating to Canada for those whose architecture is their primary occupation.

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.

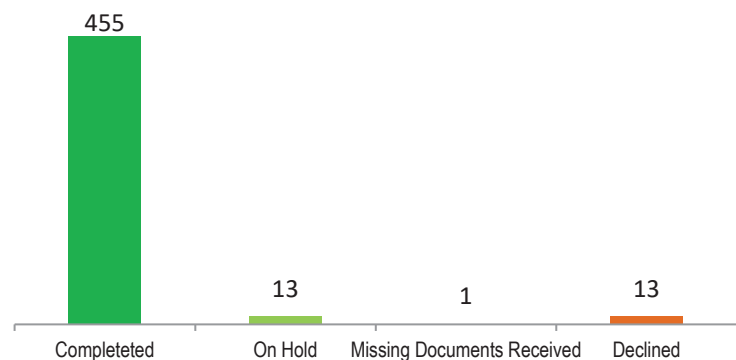
## Statistic Highlights

### Applications Received

As of August 31, 2025, the CACB has received a total of 482 ECA applications.

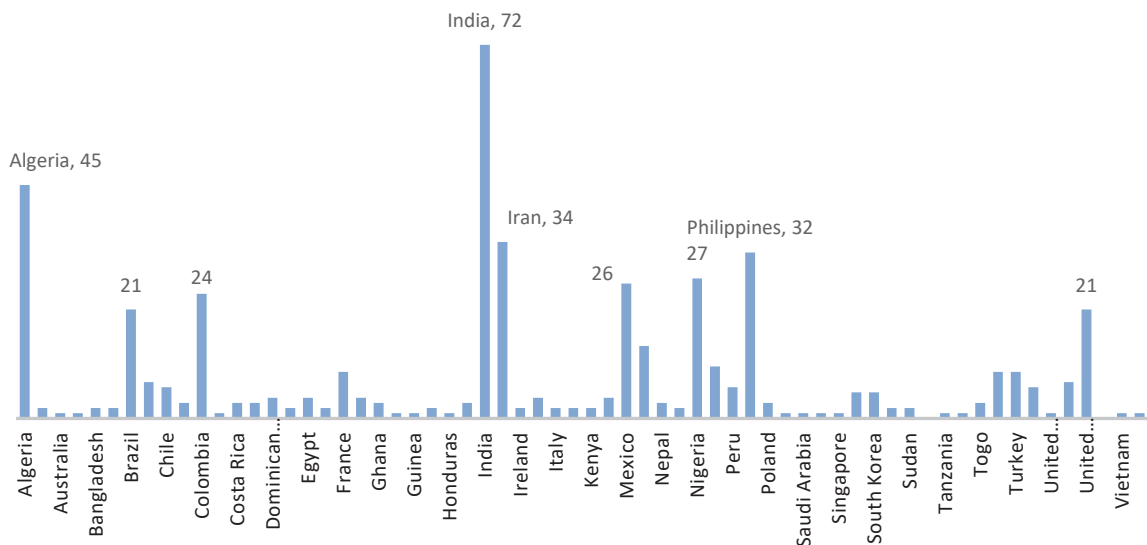


As of February 28, 2025, the CACB has issued (completed) 455 ECA reports (94.39%), while 13 applications are on hold, 1 being assessed (missing documents received), and 13 have been declined.



### ECA Applications per Country of Origin

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



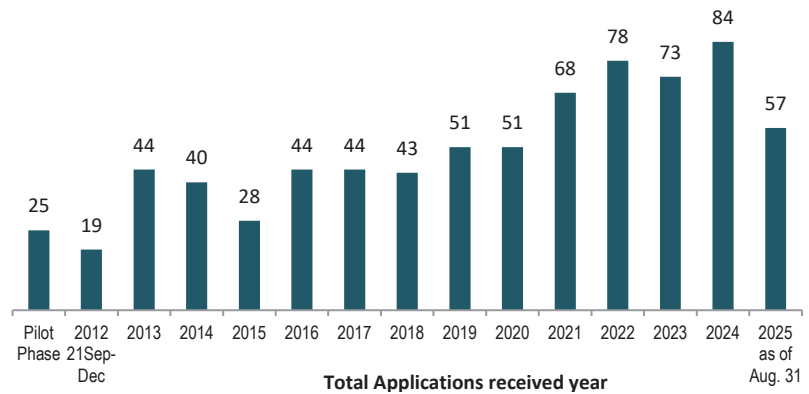
## BEFACERTIFICATION PROGRAM

### Statistic Highlights

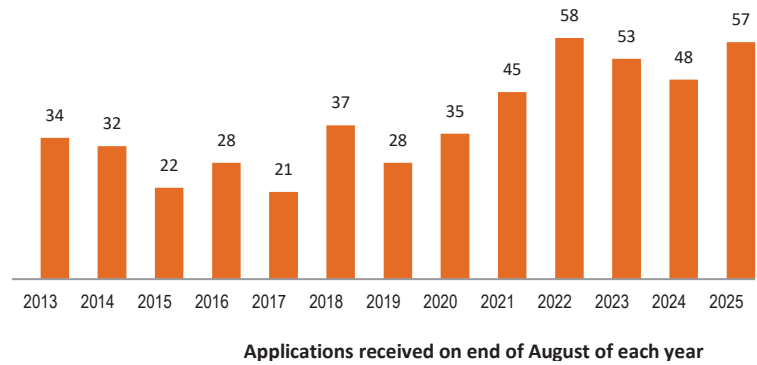
#### Applications Received

As of August 31, 2025, a total of 749 applications have been received since the official launch of the BEFA Program on September 21, 2012.

Since 2021, annual applications have consistently exceeded 65. Since 2021, annual applications have consistently exceeded 65.

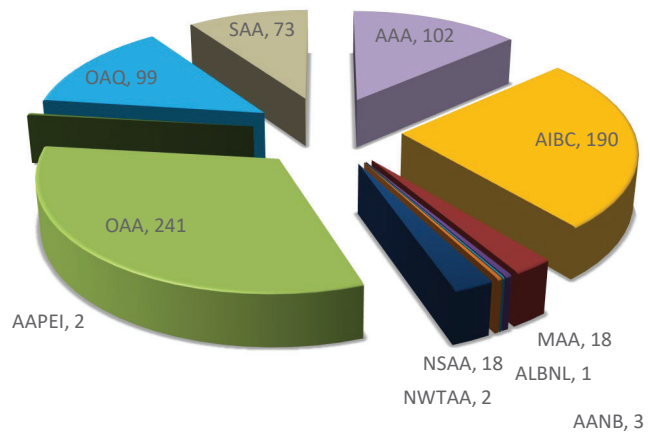


Based on figures at the end of August, the total number of applications expected by the end of 2025 is likely to be similar or higher to that of 2024.



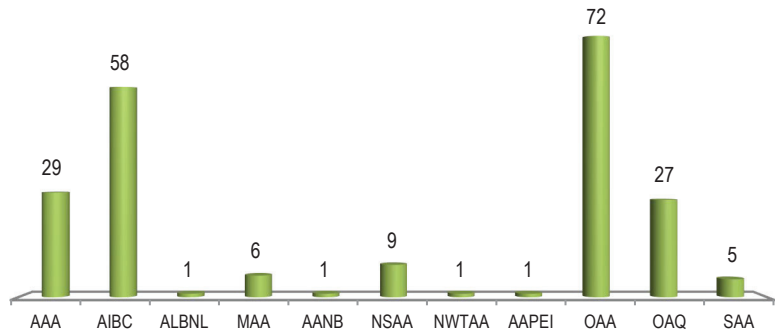
#### Desired Jurisdiction for Registration

The BEFA applicants expressed interest in registration with the following Jurisdictions distribution: Ontario: 241; British Columbia: 190; Alberta: 102; Québec: 99; Saskatchewan: 73; Nova Scotia: 18; Manitoba: 18; New Brunswick: 3; Northwest Territories: 2; Prince Edward Island: 2, and Newfoundland and Labrador: 1



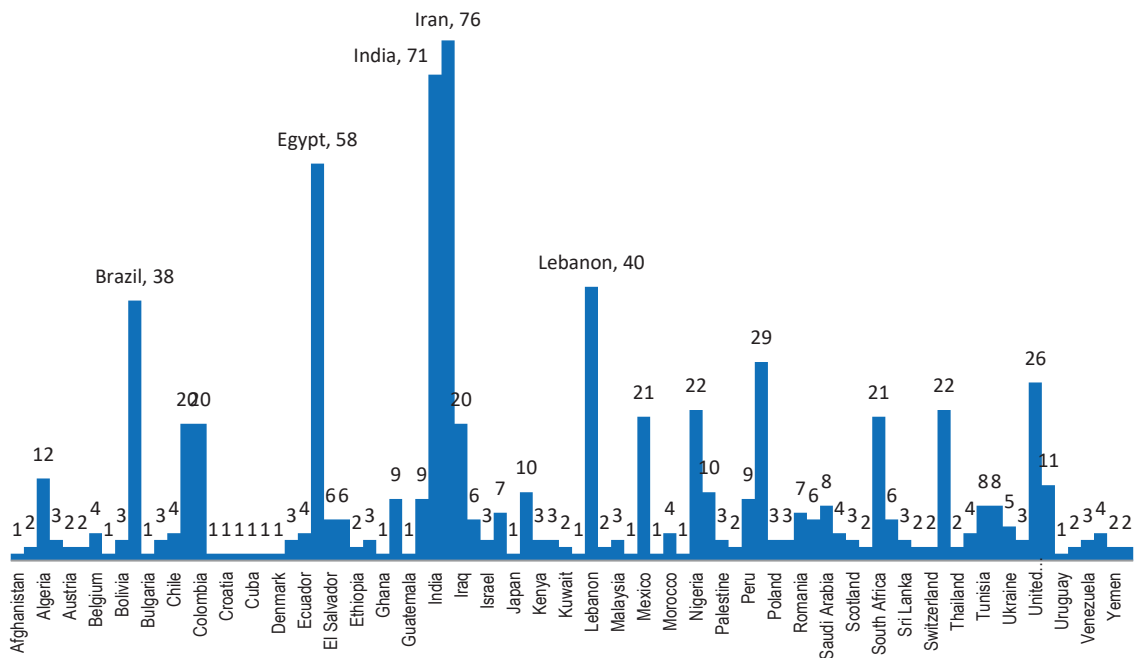
### BEAF Certification

A total of 210 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:

#### 2025 Cycle

- Spring Session

Interview Format		Total	Interview Outcome	
In-Person	Remote		Certification	Remedial
13	0	13	7	6

- Fall Interviews:

Date	Location	Interviews	Format		Total
			In-Person	Remote	
November 22, 2025	Vancouver, BC	8	8	0	18
December 6-7, 2025	Toronto, ON	10	10	0	

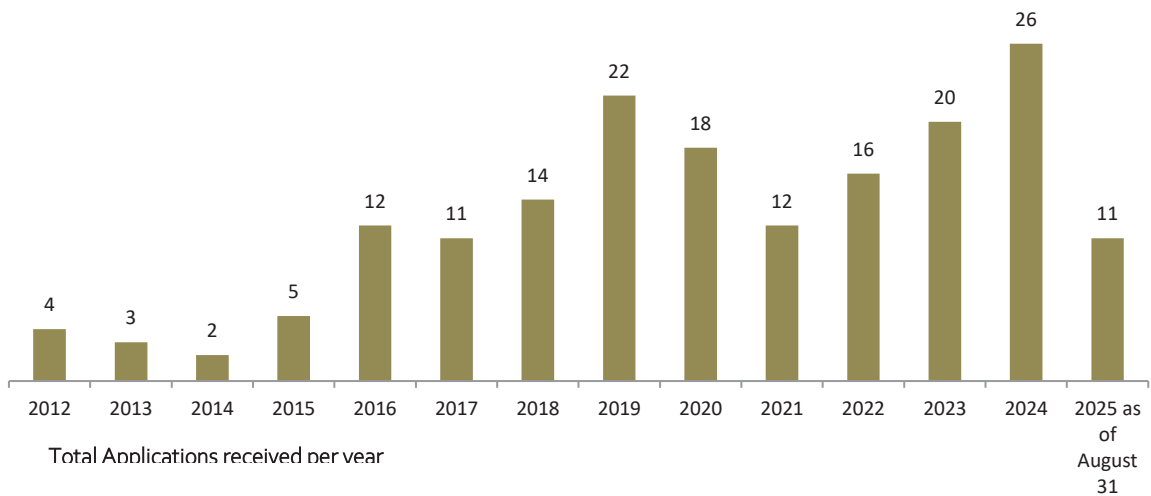
## 2- INTERNATIONAL INVOLVEMENT

### THE CANBERRA ACCORD

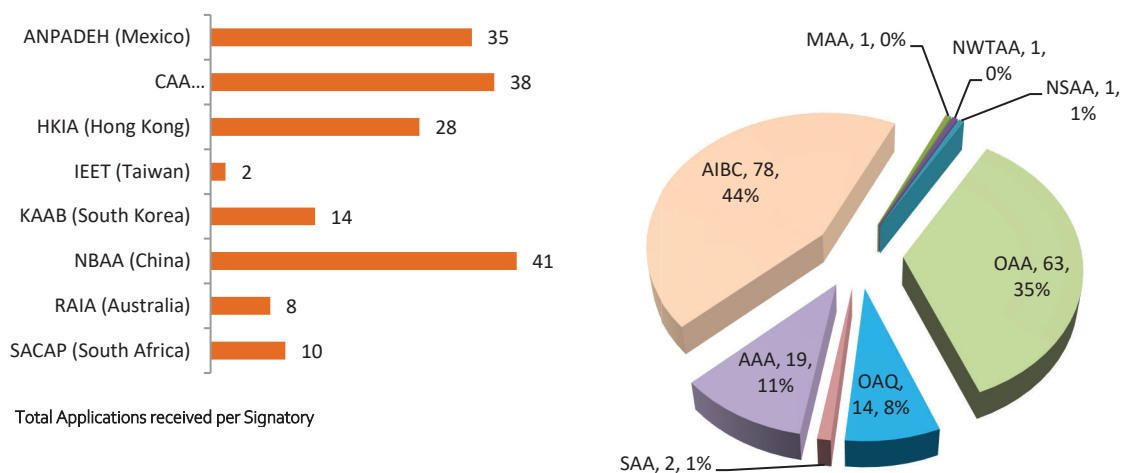
The CACB-CCCA is one of the ten (10) signatories of the [Canberra Accord](#). The latter consists of accrediting organizations that have substantial equivalent established accreditation systems for architectural education.

#### 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, **176** applications were received.



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



# Annual Update 2024

## Achievements

- New logo and branding; established “Impact by Design” as tagline
- Developed (2024) and passed (2025) bylaws for DIAC that are ONCA (Ontario Not-for-Profit Corporations Act) compliant
- Completed (2025) the first ever Arlene Gould Memorial Community Charrette – in conjunction with University of Toronto Scarborough and the Scarborough Community Renewal Organisation on the potential repurposing of the SRT light rail line and lands but did almost all of the planning and organization in 2024.
- Worked with Seneca Design for Social Change course for students to develop recommendations on branding and communications for DIAC
- DIAC joined the Accelerating Accessibility Coalition and is co-chairing the AAC’s Research and Development Committee
- Completed several new Design Impacts Framework case studies
  - Several by Board members and other Designers
  - Working on a 2-year project with Humber Students and Humber’s ACERHub (Aging in Community Education and Research Hub) on another 18 more case studies (Humber’s work is funded through federal government funding)
- Developed research survey on the future of Design
- held preliminary conversations with Canadian Accelerator + Incubator Network (CAIN) on incorporating Design into their Business Accelerator and Incubator Performance Measurement Framework. We also have a funded Industrial Design graduate student at Carlton University who will spend the next two years (started in 2025) focused on understanding and evaluating design value impact frameworks
- Drafted Fashion Sector Employment Report numbers, presented results to key industry stakeholders, coordinated mapping, and sidebar content.
- Presented on DIAC and our logo design process/experience at the Interior Design Show (IDS, January 2025)
- Developed and applied for a Skills Horizon grant through the Future Skills Centre (was not successful but got positive feedback)

- Prepared for (but decided to delay) application for an Ontario Skills Development Fund (SDF) grant

## DIAC Board Changes

- After many years, Francesco Martire (OAA, OALA) stepped down as Board Chair and was replaced by Ute Maya-Giambattista (OPPI) in June 2024
- Lisa Fulford-Roy (IDC) agreed to be Vice Chair (June 2024)
- Han Liu joined the Board as the second OALA representative (September 2024)
- After many, many years, Tim Poupore, stepped away from the Board in April 2025. Previously representing ACIDO, he continued for several years as a non-voting Board member and Secretary.
- Anna Kao (OAA, TSA) agreed to take on the role of Secretary (June 2025)
- Kiran Chhiba (OPPI) resigned from the Board (June 2025)
- Current open member Board positions
  - OPPI (one position)
  - IDC (one position)
  - Fashion (one position)

## Ongoing Initiatives

In addition to the above projects, in 2024 DIAC also worked to:

- Promote Toronto as a centre for strategic design
- Market DIAC's activities, to expand its membership and to attract strategic partners for future research
- Liaise with stakeholders in the design community to ensure that designers continue to collaborate across their disciplines and to play an active role in helping the local SME community to drive innovation and to expand sustainable business practices.

As a small not-for-profit organization, DIAC is grateful for the contributions received from its member organizations, and the co-sponsorship support provided by the City of Toronto, which enables the Committee to undertake its research and program activities for the year. Without this support DIAC's valuable work would not be possible.

*The Design Industry Advisory Committee (DIAC) is an interdisciplinary design research group established by the City of Toronto in 2001. The activities of DIAC promote the strategic value of design and the contribution of designers from all disciplines to achieving economic, social, and environmental prosperity.*

If you have any questions or would like more detail, please reach out to us at [info@diac.on.ca](mailto:info@diac.on.ca)