



Ontario Association for  
Applied Architectural Sciences

## **Advanced Standing Program Guide**

**to become a**

**Licensed Technologist OAA**

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Following Appendix C and included in the Application Guidelines for the Advanced Standing Program are the following documents:

- Application Form
- Candidate Reference Form
- Payment of Fees Form
- Project Summary Form

It is the responsibility of the candidate to ensure that the Program Guide to which he/she is referring is the current document located on the OAA Web site at [www.oaa.on.ca](http://www.oaa.on.ca). If in doubt contact the OAAAS.

## 1.0 Background

The OAAAS Advanced Standing Program is intended to give qualified senior architectural technicians and technologists an opportunity to qualify for the Licensed Technologist OAA designation based on extensive experience in the building field. A candidate for advanced standing must demonstrate they meet the educational qualification, document work experience on standard Project Summary Forms supplied by OAAAS, and prepare a portfolio including drawings and other documents. The Forms will be reviewed by a Committee to ensure the OAAAS work experience component, which is mandatory for all Licensed Technologists OAA, is satisfied. Candidates will also be interviewed by an Interview Team to discuss their portfolio.

An 'experienced candidate' must verify comprehensive architectural experience over a prescribed number of years, depending on their level of post-secondary education. (Section 3.0)

**Note: A Licensed Technologist OAA MUST be a member in good standing with OAAAS. Those candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing process.**

## 2.0 Overview

Candidate Submits <i>Application for Advanced Standing to the OAAAS Admissions Committee for Experienced Candidates</i>	An <i>Application for Advanced Standing</i> will include the following: <ul style="list-style-type: none"> <li>• A completed Application form.</li> <li>• Proof of education.</li> <li>• One <i>Project Summary Form</i> for each of five projects on which the candidate has worked. The candidate may highlight three projects on which s/he would prefer to be interviewed.</li> <li>• <i>Candidate Reference Form</i> with the names of two architects or one architect and one Licensed Technologist OAA who have consented to act as references for the candidate.</li> <li>• Proof of membership in good standing in OAAAS. Those candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing Program.</li> <li>• The Application fee.</li> <li>• A <i>Checklist</i> confirming the inclusion of the required information.</li> </ul>
Admissions Committee reviews the Application and Project Summary Forms	The Committee will review the submission to gain an understanding of the candidate's work to date. Three projects from the five Project Summary Forms submitted will be selected for detailed review at the candidate's interview.
Candidate is notified of the date of the interview and the selected three projects	The candidate must send one hardcopy of all drawings and documents for each of the three projects to the OAA office one week prior to the interview date.
Candidate is interviewed by an Interview Team appointed by the Committee	The purpose of the interview is to test the candidate's depth of knowledge. The three projects will be used to gauge the candidate's awareness, understanding and ability as a senior architectural technologist.
Reference check	The candidate's references will be contacted to confirm or complete an understanding of the candidate's experience.
Committee provides the candidate a written Decision	The Committee may place the candidate at any stage of the OAAAS process and may require the candidate to undertake such study, additional training and/or to complete such additional work experience as it may require, in its sole discretion.
Upon successful completion of the interview process	If the Committee approves the candidate to move forward, s/he will be entitled to attend the OAA Admission Course.
Upon completion of the OAA Admission Course	The candidate will be entitled to write the <i>Licensed Technologist OAA examination</i> .
Upon successful completion of the examination	The candidate will be entitled to submit to the OAA an <i>Application for Licence with Terms, Conditions and Limitations as a Licensed Technologist OAA</i> .

### 3.0 Eligibility

A candidate must meet the following 12-Year Experience Rule:

- .1 **10 years experience** required for senior architectural technicians and technologists who have a 2-year college/university diploma/degree or equivalent (12-2 = 10), **or**
- .2 **9 years experience** required for senior architectural technicians and technologists who have a 3-year college/university diploma/degree or equivalent (12-3 = 9), **or**
- .3 **8 years experience** required for senior architectural technicians and technologists who have a 4-year college/university diploma/degree or equivalent (12-4 = 8).

Within this work experience, a candidate must demonstrate contemporary knowledge of Ontario laws and regulations by submitting documentation to demonstrate they have at least 940 hours of work experience in Ontario within the three consecutive years prior to submitting an application to the OAA.

A candidate may demonstrate their currency of knowledge by submitting information about a sufficient number of projects to cover the 940 hour requirement in either of the following situations:

1. Demonstrating they have worked under the personal supervision and direction of an OAA-licensed architect on these projects in the relevant period, or
2. By showing proof that the candidate has completed these projects through qualification (Building Code Identification Number) with the Ministry of Municipal Affairs and Housing in the Designer (Small Building) category, and has been registered with the Ministry either as a sole proprietor or as principal of a firm offering design services to the public for these projects and in the relevant period.

### 4.0 The Submission

- .1 Each candidate is required to submit:
  - .i At least five Project Summary Forms which outline the information for each of five projects on which the candidate has worked in their career, including at least three projects on which they worked under the personal supervision and direction of an OAA-licensed architect. If necessary, a candidate may submit additional forms to demonstrate the full range of work experience. Each form will include information such as name of the architectural practice and the architect for whom the project was done; role/employment relationship to the architectural practice; approvals required; engineering systems; role of the candidate and be verified by the architect. The candidate may highlight three projects on which he/she would prefer to be interviewed.
  - .ii Candidate Reference Form. (References will be contacted)
  - .iii Appropriate fee.
  - .iv Application for Advanced Standing Program.
  - .v Resume
- .2 The OAAAS Admissions Committee for Experienced Candidates (Committee), composed of OAA members, will review the five Forms and select three projects which will form the basis for the interview for which the candidate must submit a portfolio of work.
- .3 Each candidate will prepare a portfolio of work, illustrating how s/he has learned from experiences in areas necessary to satisfy the categories and hours of the OAAAS Experience Requirements. (Appendix A)

## 5.0 The Interview

- .1 An Interview Team will be selected by the Committee. It will be composed of three members licensed by the OAA, at least one of whom shall be an OAA architect and at least one of whom shall be a Licensed Technologists OAA. The interview is intended to verify the material presented in the candidate's portfolio. The candidate is required to send one hardcopy of all the drawings/documents for each of the three selected projects to be received at the OAA office one week prior to the interview date.
- .2 The candidate will review his/her portfolio with the Interview Team, present information and answer questions based on the Guidelines for Candidate Interview which have been tailored specifically to the candidate's portfolio (**Appendix B**). The purpose of each question will be to ascertain whether the candidate has sufficient experience and knowledge to demonstrate awareness, understanding and/or ability relative to the OAAAS Experience Requirement Categories set out in the Experience Area Description and Required Activities (**Appendix A**).
- .3 The Team will then make a recommendation concerning the experience relative to the OAAAS Experience Requirements to the Committee.
- .4 The Committee will evaluate all relevant information and provide a written Decision to the candidate. The Committee may place the candidate at any stage of the OAAAS process and may require the candidate to undertake such study, additional training and/or to complete such additional work experience as it may require, in its sole discretion.

## 6.0 The Decision

- .1 The Decision of the Committee is **FINAL**.
- .2 If, at the interview, the candidate does not demonstrate the required learning, s/he may reapply at a reduced fee no sooner than **six months** and no longer than **two years** following the Committee's Decision, after satisfying all the requirements set out in the Decision.
- .3 The candidate who successfully verifies learning through experience, including currency of knowledge, will have satisfied the total 7,200 hours for the OAAAS experience component as determined by the Committee.
- .4 The successful candidate will be eligible to attend the OAA Admission Course and write the Licensed Technologist OAA examination.

## 7.0 Roles and Responsibilities of the Admissions Committee for Experienced Candidates

- Be comprised of OAA members and support staff, as required.
- Maintain fairness throughout the process.
- Review the candidate's portfolio for its content and completeness.
- Appoint the Interview Team(s).
- Review the findings of the Interview Team(s).
- Provide the candidate with a written Decision.

## 8.0 Roles and Responsibilities of the Interview Team

- Be comprised of OAA members.
- Maintain fairness throughout the process.
- Ascertain from the portfolio and interview whether the candidate meets the OAAAS Work Experience Requirement.

## 9.0 Roles and Responsibilities of the Experienced Candidate

- Participant, presenter and author of the Project Summary Forms and the portfolio.
- Be thoroughly familiar with the experience categories set out in Experience Area Description and Required Activities (**Appendix A**).
- Submit documentation that is clear and comprehensive, which sets out his/her experience that satisfies the requirements (**Appendix A**).
- Be prepared to discuss any aspect of the portfolio during the interview.
- Provide additional information as requested in a timely manner.

## 10.0 OAAAS Experience Criteria Relevant to Experienced Candidates

The OAAAS Experience Criteria are used as a guide for evaluation of information presented in the Project Summary Forms and the portfolio that is intended to meet the OAAAS experience requirements. The criteria are aligned with the categories described in the Experience Area Description and Required Activities, in order to facilitate the portfolio review and evaluation process (Appendix A).

A candidate is required to obtain the equivalent of a minimum of 7200 hours of experience under the personal supervision and direction of an architect in either an architectural practice or other acceptable architectural employment situation, or as a holder of a BCIN providing services to the public. The candidate's experience must satisfy the minimum number of hours prescribed under categories A, B and C set out below, which constitutes the core areas of practice. Candidates are required to include in their experience a variety of project types, sizes and occupancies.

A list of categories, which constitute the core areas of practice, is summarized as follows:

### Category A – Design and Construction Documents

1. Programming
2. Site and Environmental Analysis
3. Schematic Design
4. Engineering Systems Coordination
5. Building Cost Analysis
6. Code Research
7. Design Development
8. Construction Documents
9. Specifications and Materials Research
10. Document Checking and Coordination

### Category B – Construction Administration

11. Bidding and Contract Negotiations
12. Construction Phase – Office
13. Construction Phase – Site

### Category C – Management

14. Project Management
15. Office Management

The Team will match the candidate's experience to the 15 experience categories to ensure the OAAAS experience requirements are satisfied (Appendix A).

## 11.0 Application Requirements

Each candidate must include the following elements in his/her submission:

- Proof of OAAAS membership. *Those candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing process.*
- Application for Advanced Standing (found at [www.oaa.on.ca](http://www.oaa.on.ca) under OAAAS)
- Current job description.
- Detailed résumé/curriculum vitae.
- Post-secondary transcripts.
- A copy of his/her birth certificate.
- Five Project Summary Forms.
- The required fees.

## 12.0 Fees

- Applying for interview \$ 600.00 + HST
- Re-applying for interview \$ 300.00 + HST

## 13.0 Rights Reserved

The OAAAS and the OAA reserve the right to approve and implement amendments to the Advanced Standing for Experienced Candidates program and the Licensed Technologist OAA program pursuant to legislative authority. It is the responsibility of the candidate to check the requirements.

## Experience Area Description and Required Activities

### Category A: Design and Construction Documents

#### 1. Programming

Programming is the process of setting forth in writing the owner's requirements for a given project. Steps in this process include: establishing goals, considering a budget, collecting, organizing and analyzing data, identifying and developing concepts, and determining general needs. The Client-Architect agreements presume that the owner will furnish the program and that any involvement of the architect in writing the program will be a service not covered in the traditional agreement for Design and Contract Administration. However, many owners employ the architect to assist them in preparing a functional program. The project may also be affected by the mortgage lender; public officials involved in health, welfare and safety; future tenants, and, increasingly, the people who will work in the built environment. Their input at the programming stage could be essential to maintain an orderly design process.

#### Required OAAAS Candidate Activities include the following:

- Participate in conferences with clients regarding programming, periodic reviews and formal presentations and assist in preparing minutes or reports for future reference.
- Assist with presentations at zoning and variance hearings, and at meetings with the owners and consultants of these projects.
- Assist in preparing the summary and evaluation of data and requirements obtained from all sources. Research current literature pertaining to architectural programming.

#### 2. Site and Environmental Analysis

Site analysis includes land planning, urban design and environmental evaluation. Land planning and urban design are concerned with relationships to surrounding areas and involve consideration of the physical, economic and social impact of proposed land use on the environment, ecology, traffic and population patterns. Governmental agencies frequently require documentation on the results that construction will have on surrounding lands (i.e. environmental impact studies). Decisions relating to site analysis must involve the selection, organization and evaluation of pertinent data that will lead to a resolution of the owner's program while conforming to legal requirements.

#### Required OAAAS Candidate Activities include the following:

- Assist in analyzing several sites to assess the feasibility of their use for a proposed project.
- Help analyze the feasibility of using a specific site for a project.
- Assist in the analysis of specific land use and location for a project.
- Assist in the formulation of the most appropriate land use strategy to achieve a desired environmental impact.
- Research site restrictions such as zoning, easements, utilities, etc.
- Participate in public hearings about land use issues and prepare reports for future reference.

#### 3. Schematic Design

From the owner-approved program, the architect develops alternative solutions to satisfy technical and aesthetic requirements. Preferred schemes are presented until the owner and architect can agree on one.

#### Required OAAAS Candidate Activities include the following:

- Participate in the development and preparation of preliminary design concepts to determine the spatial relationships that best satisfy the owner's program.
- Participate in the development and coordination of program requirements with consultants.
- Assist in the preparation of presentation drawings and models.
- Assist in the analysis and selection of engineering systems.
- Participate in design review and approval meetings with clients, user groups, etc.

#### 4. Engineering Systems Coordination

The architect is usually responsible for the selection, design and coordination of all building systems, including the engineering systems. The emphasis of this training requirement is to develop an understanding of the integration of the engineered systems normally designed by consultants and provided by product suppliers under the direct supervision and control of the architect. These traditionally have included structural, mechanical and electrical subsystems as well as newer technical innovations and special requirements, such as security, telecommunications and computer applications. Architects must know how engineering systems work, including system benefits and limitations, availability, initial and operating costs, and the space requirements necessary to provide the basis for system design, selection and integration. This knowledge also provides the vital communication links necessary for appropriate interaction with engineering consultants and product suppliers.

**Required OAAAS Candidate Activities include the following:**

- Become familiar with construction methods and performance of different engineering systems.
- Understand safety requirements and the selection process for engineering systems.
- Assist in research, analysis and selection of engineering systems during the schematic design and development phases.
- Help coordinate engineering systems documents provided by consultants into the construction documents produced by the architect.
- Review consultants' drawings for conceptual understanding of systems, space requirements and possible conflicts or interference of structure, ductwork, plumbing lines, electrical fixtures, etc.
- Assist in checking shop drawings, evaluating samples and maintaining records.
- Visit job site and observe installation and integration of engineering systems, construction details and space requirements.
- Attend systems start up, operation and maintenance meetings required for acceptance and use by the owner.
- Obtain and study manufacturers' literature for engineering systems and components.
- Become familiar with relevant codes and regulatory standards applicable to various engineering systems.
- Check maintenance manuals and warranties submitted by contractors for conformance with contract documents.

**5. Building Cost Analysis**

An important responsibility of the architect is to evaluate the probable project construction cost. Accurate estimates are crucial to the client. They influence decisions involving basic design, selection of building products and systems and construction scheduling. Long-term maintenance, as well as tax impact of material and system selection (value engineering), are additional factors that bear on development of the project. For their own preliminary analysis, most architects use computations based on area and/or volume. Estimates of cost provided later in the design process are frequently made on the basis of labour and material requirements (quantity surveys), a method that requires a more specialized knowledge of construction costs.

**Required OAAAS Candidate Activities include the following:**

- Calculate the area and volume of a project.
- Make a simplified quantity takeoff of selected materials and prepare comparative cost analyses.
- Assist in the preparation of cost estimates of each stage of a project.
- Review various references and texts utilized in cost estimating.
- Assist in the preparation of cost analyses for current projects, using a variety of indices.
- Conduct a survey of current costs per square foot of various types of projects, using local cost data.

**6. Code Research**

Building inspectors as well as officials in zoning, environmental and other agencies relating to the health, welfare and safety of the public, oversee the enforcement of federal, provincial and local regulations related to building construction. The codes promulgated by these various agencies have a direct bearing on the total design process and thorough knowledge of all requirements is essential to the satisfactory completion of any project.

**Required OAAAS Candidate Activities include the following:**

- Assist in searching and documenting codes, regulations, etc. for one or more specific projects.
- Study procedures necessary to obtain relief or variances from particular requirements as they relate to a project.
- Calculate certain variables (i.e. numbers and size of exits, stair dimension, public toilet rooms, and ramps) in satisfaction of code requirements.
- Determine a project's allowable land coverage as well as maximum areas in compliance with zoning and any other related ordinances.

**7. Design Development**

Based on the client-approved schematic design, the architect fixes and details, for the client's further approval, the size and character of the entire project, including selection of material and engineering systems.

**Required OAAAS Candidate Activities include the following:**

- Participate in the preparation of detailed design development drawings from schematic design documents.
- Assist in developing various schedules and outline specifications for materials, finishes, fixed equipment, fixtures, construction time and construction cost.
- Help coordinate engineering systems proposed for the project.
- Participate in design review and approval meetings with clients, user groups, etc.

**8. Construction Documents**

The working drawings phase of construction documents preparation constitutes the major activity on a project in an architect's office. These drawings describe in graphic form all of the essentials of the work to be done: location, size, arrangement and details of the project. Since the successful and timely execution of these documents can be equated closely with an office's financial success, architects constantly search for more efficient ways to produce construction documents. Regardless of the method of preparation, it is extremely important that the documents be accurate, consistent, complete and understandable. This requires thorough quality control including constant review and cross-checking of all documents. In addition, effective coordination of consultants' drawings is essential to avoid conflicts between the various trades during construction.

**Required OAAAS Candidate Activities include the following:**

- Work in the preparation of detail drawings, developing technical skills in drafting accuracy, completeness and clarity.
- Assist in the coordination of all documents produced by the architect and the consultants.
- Develop knowledge of professional responsibilities and liabilities arising from the issuance of construction documents.
- Participate in the mechanics of assembling the finished construction documents.
- Assist the job captain (or equivalent) in routine administrative/control tasks.

**9. Specifications and Materials Research**

Well-grounded knowledge of specification-writing principles and procedures is essential to the preparation of sound, enforceable specifications. Unless these skills are properly developed, expert knowledge of materials, contracts and construction procedures cannot be communicated successfully. A fundamental principle of specification writing requires the architect to understand the relationship between drawings and specifications, and to be able to communicate in a logical, orderly sequence, the requirements of the construction process. Many factors must be considered in the selection and evaluation of material or products to be used in a project: appropriateness, durability, aesthetic quality, initial cost, maintenance, etc. To avoid future problems, it is extremely important that the architect recognize the function of each item to be specified. The architect must carefully assess new materials as well as new or unusual applications of familiar items, regardless of manufacturer representations; to be certain no hidden deficiencies exist that might create problems for the owner and expose the architect to liability.

**Required OAAAS Candidate Activities include the following:**

- Review construction specifications' organization, purpose and format, and assist in writing specifications. Review and analyze bidding forms, insurance and bonding requirements, liens, supplementary and special conditions.
- Research and evaluate data for products to be specified, including information regarding availability, cost, code acceptability and manufacturers' reliability. Attend sales presentations in connection with this research.
- Research industry standards and guidelines for specific classes of products (e.g. curtain walls, aluminum windows) as they affect various manufacturers' items being considered for acceptability on a project. Research construction techniques and systems and understand workmanship standards such as poured-in-place concrete, masonry construction, etc.
- Evaluate the potential for using master specifications in a project specification, including procedures needed to adapt individual sections for this use.

**10. Document Checking and Coordination**

Close coordination between drawings and specifications is required when preparing construction documents. The work of each consultant must be reviewed regularly and checked against the architectural drawings as well as the drawings of other consultants to eliminate conflicts. Before final release for construction purposes, the drawings must be checked and cross-checked for accuracy and compatibility.

**Required OAAAS Candidate Activities include the following:**

- Assist in cross-checking products and materials called for in the specifications for consistency with corresponding terminology and descriptions on the working drawings.
- Check drawings prepared by others for accuracy of dimensions, notes, abbreviations and indications.
- Assist in developing a schedule of lead time required for proper coordination with other disciplines.
- Check consultants' drawings with architectural drawings and other consultants' drawings for possible conflicts and interference of plumbing lines, ductwork, electrical fixtures, etc.
- Assist in the final project review for compliance with applicable codes, regulations, etc.

**Category B: Construction Administration**

**11. Bidding and Contract Negotiations**

The architect assists in establishing and administering bidding procedures, issuing addenda, evaluating proposed substitutions, reviewing the qualifications of bidders, analyzing bids or negotiated proposals and making recommendations for the selection of the contractor(s). The construction contract and related documents are the formal instruments that bind the major parties together in the construction phase. They detail the desired product and the services to be provided in its construction, as well as the consideration to be paid for the product and the services.

**Required OAAAS Candidate Activities include the following:**

- Carefully review the bidding/award stages of previous projects. Develop an understanding of problems encountered and how they were resolved.
- Assist in the pre-qualification of bidders.
- Assist in the receipt, analysis and evaluation of bids, including any alternative, separate or unit prices.
- Learn what information and submittals are required prior to issuance of notice to proceed.
- Assist in evaluating equal product considerations in preparing addenda.
- Meet with contractors and material suppliers to better understand problems they encounter with bid packages and construction contract documents.
- Assist in the process of receipt and evaluation of bids.
- Assist in the preparation and negotiation of construction contracts and become familiar with the conditions of the contract for construction in order to identify the roles of the architect, contractor, owner, bonding company and insurer in the administration of the construction phase.

## **12. Construction Phase – Office**

During the construction phase there are many related tasks that do not directly involve field observations: processing contractors' applications for payment, preparing change orders, checking shop drawings and samples, adjudicating disputes, etc. The architect's handling of these matters will usually have a direct impact on the smooth functioning of the work in the field. For example, prompt processing of the contractor's application for payment, including review of any substantiating data that may be required by the contract documents, helps the contractor maintain an even flow of funds. Items such as shop drawings, samples and test reports submitted for the architect's review must be acted upon promptly to expedite the construction process. Changes in the work that may affect the time of construction or modify the cost are accomplished by change orders. Interpretations necessary for the proper execution of work must be promptly given in writing even when no change order is required.

### **Required OAAAS Candidate Activities include the following:**

- Assist in processing applications for payment and preparing certificates for payment.
- Assist in checking shop drawings, evaluating samples submitted and maintaining records.
- Assist in evaluating requests for changes interpreting documents and preparing change orders.
- Participate in resolution of disputes and interpretation of conflicts relating to the contract documents.
- Participate in the assembly of evidence and preparation of testimony to be used before an arbitration panel or in court.
- Become familiar with the legal responsibilities of owners, contractors and architects.
- Participate in the preparation of record documents at project completion.

## **13. Construction Phase – Site**

In administering the construction contract, the architect's function is to determine if the contractor's work generally conforms to the requirements of the contract documents. To evaluate the quality of material and workmanship, the architect must be thoroughly familiar with all of the provisions of the construction contract. Periodic reports on the stage of completion of scheduled activities are collected and compared to the overall project schedule at job site meetings. These meetings facilitate communication between the contract parties and produce a detailed progress record. The architect must determine through observation the date of substantial completion and receive all data, warranties and releases required by the contract documents prior to final inspection and final payment. In addition to these construction-related responsibilities, the architect interprets contract documents when disagreements occur and makes findings in regard to the dispute impartially, even when the owner is involved. Dissatisfaction with the architect's decision can lead to arbitration or litigation.

### **Required OAAAS Candidate Activities include the following:**

- Visit the job site and participate in general review of the work in place and material stored, and prepare field reports of such routine reviews.
- Review and analyze construction time schedules. Understand the various network methods (e.g. critical path method) potentially available to the contractor. Compare work performed and the anticipated schedule.
- By reviewing contract documents and participating in professional development programs, develop an awareness of the contractual obligations related to the general review during construction.
- Attend periodic job-site construction meetings and assist in recording and documenting all actions taken and agreed to at such meetings.
- Participate in the substantial performance review and assist in the deficiency list verification.
- Participate in the final acceptance review with the owner and other involved parties.

## **Category C: Management**

### **14. Project Management**

The economic and professional health of a firm depends on an orderly, trackable method of project execution. A clearly defined project work plan, the key to the efficient management of project tasks, requires participation and input from team members, consultants, client representatives and other key decision-makers (financial experts, developers, lawyers and contractors). The project manager defines consensus goals, and coordinates tasks and scheduling. Team building depends on clear goals and good communication, with particular attention to decisions that influence the work of multiple team members.

A project file initiated and maintained by the project manager is the comprehensive record to the project's life and a useful resource for future endeavours. The work plan must be congruent with all project-related contractual agreements (which are normally maintained in the project file). Scheduled quality control reviews are identified in the work plan; the project manager may request interim reviews in advance of established submittal dates. It is the project manager's responsibility to measure actual schedule/budget progress against the work plan 'yardstick', assess all discrepancies and take the corrective action necessary to maintain project control. The project manager also maintains design quality during bidding, contract negotiation and construction phases through administration of the project file, oversees the firm's construction representative and monitors scheduled on-site quality reviews. Finally, the project manager closes out project records and agreements and sets up future post-occupancy evaluation procedures.

**Required OAAAS Candidate Activities include the following:**

- Review the firm's project management manual or all relevant forms, checklists and other practice aids if a manual does not exist.
- Understand the procedure for assignment of project management responsibilities and the project manager's role in the acquisition process.
- Participate in the development of a project work plan including identifying goals, client requirements, responsibilities, a first-cut schedule and the project record.
- Review a work plan against all project-related contractual agreements.
- Become familiar with team management including role assignments, team communication methods and frequency and maintaining the project file.
- Review design documentation standards and understand expected levels of documentation at each phase of the project.
- Attend quality reviews at project development milestones identified in the work plan.
- Assist in preparing project status assessments including schedule and scope variances and actions required to maintain project budget control.
- Review the project management file for close-out activities such as contractual fulfillments, final fee for services, invoicing and modifications (e.g. change orders).
- Attend post-occupancy evaluation trips to completed project sites.

**15. Office Management**

Although architecture is a creative profession, current techniques of practice require that the architect's office operate in a similar manner to other commercial enterprises. Steady income must be generated and expenses carefully budgeted and monitored so that economic stability can be maintained. Accurate records must be kept for tax purposes and for use in future work. Established office requirements and regulations are essential to maintaining a smooth operation; office practice manuals are a typical tool for dissemination of this information. Profitable use of office personnel requires budgeting time and adhering to schedules. The architect's relationship to the client is established by contractual agreement. A contract establishes the duties and obligations of the parties. In order for a contract to be enforceable, there must be mutual agreement between competent parties, an acceptable monetary consideration, and it must be for lawful purpose and accomplishable within an estimated time frame. Effective public relations play an essential role in the creation of the architect's image. This is important in bringing new clients and work into the office as well as in attracting superior people for the professional staff. The architect must participate in marketing activities if the practice is to succeed. On the other hand, the architect's marketing activities (unlike those of merchants, manufacturers and others in commerce) are subject to certain professional constraints. The architect must learn marketing techniques that are effective while remaining within legitimate rules of professional conduct.

**Required OAAAS Candidate Activities include the following:**

- Review the process of internal accounting and cost control systems for operation of the firm.
- Participate in allocation of time to all elements involved in a total project from preliminary design through construction.
- Review professional service contracts for their structure, content, determination of responsibility and enforcement procedures.
- Review the compensation structure as related to types of services rendered by the firm.
- Review current contractual relationships with consultants.
- Review the firm's professional liability insurance policy and develop an awareness of potential practices and procedures that are not covered by the policy.

- Assist in developing programs to publicize the firm's professional services and its expertise.
- Participate in the firm's program for securing commissions for professional services through assisting in market research, prospect list preparation and information-gathering activities.
- Assist in developing firm brochures and advertising as elements of promotion.
- Assist or accompany principals or marketing staff carrying out business development.
- Participate in presentation to prospective clients and formal selection interviews.
- Participate in the firm's internal budgeting (profit planning) process.

## Appendix B

### Guidelines for Candidate Interview

1. The purpose of the interview is to ensure that the CANDIDATE has:
  - a) A basic understanding of construction methodologies, i.e. the why.
  - b) A general understanding of design, technical and legal aspects that impact on the practice of architecture in Ontario.
2. The areas in which questions may be asked are:
  - a) *Architects Act*
  - b) OAA Policy Statement on Licensed Technologists OAA (Scope of Work)
  - c) Ontario Regulation 27, as amended
  - d) Services, Fees and Contractual Agreements
  - e) The Ontario Building Code
  - f) Design (basic principles)
  - g) Contract Documents
    - a. Specification
    - b. Working Drawings
  - h) Surety Bonds and Construction Insurance
  - i) Bidding
  - j) Bid Opening, Bid Analysis and Contract Award
  - k) Contract Administration
    - a. basic construction arrangements
    - b. contractor's responsibilities
    - c. general review
    - d. site meetings
    - e. changes
    - f. record keeping
    - g. certification for payment
    - h. substantial performance
    - i. close-out and take-over
  - l) Construction Lien Act
  - m) Authorities Having Jurisdiction i.e. *Planning Act, Environmental Protection Act, etc.*
3. The candidate may also be required to prepare a sketch related to a portion of a building enclosure.
4. Candidates must bring to the interview hard copies of the following documentation concerning the three projects (as selected by the Committee from the five Project Summary Forms):
  - i. Design sketches
  - ii. Design Development drawings  
Plus relevant samples of the following documentation:
  - iii. Working drawings (with approvals)
    - o Architectural
    - o Structural, Mechanical and Electrical
  - iv. Specifications
    - o Architectural
    - o (Optional: Structural, Mechanical and Electrical)
  - v. Bidding Information
  - vi. Contract Administration/General Review
    - o Site Reports
    - o Change Orders
    - o Certificates for Payment



Ontario Association of Architects

POLICY OF THE COUNCIL OF THE  
ONTARIO ASSOCIATION OF ARCHITECTS (OAA)  
WITH RESPECT TO APPLICATIONS FOR LICENCE  
AND CERTIFICATES OF PRACTICE  
BY HOLDERS OF CERTIFICATES OF QUALIFICATION  
AS LICENSED TECHNOLOGIST ISSUED BY  
THE ONTARIO ASSOCIATION FOR  
APPLIED ARCHITECTURAL SCIENCES (OAAAS)

**POLICY STATEMENT**

Section 13(1) of the *Architects Act* sets out the requirements for the issuance of a licence.

Every applicant must comply with the academic and experience requirements specified in the regulations and have passed such examinations and completed such courses of study as the Council may set or approve unless the Council has exempted the applicant from these requirements.

The academic and experience requirements for the issuance of a licence are stipulated in Section 31 of the regulations.

Where an applicant for a licence is the holder of a certificate of qualification as Licensed Technologist issued by OAAAS, the applicant shall be exempted from the academic and experience requirements set out in the regulations subject to the terms, conditions and limitations hereinafter set out, which shall be incorporated and form part of the licence issued by the Registrar.

Every holder of a certificate of qualification as Licensed Technologist issued by OAAAS is on the issuance of a licence by the Registrar, a member of the Association, subject however to the terms, conditions and limitations as incorporated and part of the licence.

## **TERMS, CONDITIONS and LIMITATIONS OF LICENCE**

1. The Licensed Technologist may prepare and provide a design for, or perform general review of or evaluate, advise or report on the construction, enlargement or alteration of a building that:
  - (1) as constructed enlarged or altered, is not more than three storeys in height and not more than 600 square metres in gross area and is used or intended for one or more of the following occupancies:
    - i Residential;
    - ii Business;
    - iii Personal services;
    - iv Mercantile;
    - v Industrial;
    - vi a restaurant designed to accommodate not more than 100 persons consuming food or drink;
  - (2) is used or intended for residential occupancy, and contains one dwelling unit or two attached dwelling units, and, as constructed, enlarged or altered, is not more than four storeys in height;
  - (3) is used or intended for residential occupancy, that contains three or more attached dwelling units and, as constructed, enlarged or altered, is not more than four storeys in height and not more than 600 square metres in building area.
2. The Licensed Technologist shall use the designation "Licensed Technologist OAA" in every aspect of the practice of architecture but may not use the title "architect" as an occupational designation or use an addition to or abbreviation of the title "architect", an occupational designation or a term, title, addition or description that will lead to the belief that the Licensed Technologist may provide architectural services other than as set out in paragraph 1 hereof. The Licensed Technologist OAA is permitted to use the abbreviated title of "Lic.Tech.OAA".
3. A Licensed Technologist shall not provide architectural services other than as permitted by paragraph 1 of this policy. A Licensed Technologist may act as the prime consultant for the construction, enlargement or alteration of any building but where the Licensed Technologist has been engaged or employed or has agreed to provide architectural services to a member of the public other than as permitted by paragraph 1 of this policy, the Licensed Technologist must engage or employ a holder of a certificate of practice who is not subject to the terms, conditions and limitations that the holder of the certificate of practice may only provide architectural services as set out in paragraph 1 of this policy. Nothing herein prevents the Licensed Technologist from then assisting in the provision of the architectural services provided that such assistance is under the personal supervision and direction of that holder and that this is clearly communicated to the client.
4. The Licensed Technologist is not qualified to vote at an election of members of the Council, and is not eligible for election to the Council and may not vote at the annual or other general meetings of the members of the Association. The Licensed Technologist is not permitted to sit on OAA Statutory Committees nor act as a Mentor under the Intern Architect Program.

5. The Licensed Technologist may provide architectural services to the public only:
  - 1) as a sole proprietor;
  - 2) in partnership with one or more Licensed Technologists who are holders of licences issued in accordance with this policy; or
  - 3) through a corporation;

provided that the Licensed Technologist, partnership or corporation holds a certificate of practice which is subject to the terms, conditions and limitations that the holder of the certificate of practice may only provide architectural services as set out in paragraph 1 of this policy and that the holder provides services that are within the practice of architecture under the personal supervision and direction of a Licensed Technologist to whom a licence has been issued.

6. The Licensed Technologist shall not legally or beneficially own, directly or indirectly, exercise control or direction or legally or beneficially own directly or indirectly shares, or any class of shares of a corporation as hereinafter outlined and, together with another shareholder or other shareholders associated with the person exercise control or direction over, more than 49 percent of the total number of issued and outstanding shares of any class of shares of a corporation to whom a certificate of practice has been issued under Section 14 of the *Architects Act* or a corporate partner of a partnership of corporations to whom a certificate of practice has been issued under Section 16 of the *Architects Act* which is not limited to the provision of architectural services as set out in paragraph 1 of this policy. Section 21(2) of the *Architects Act* applies to this paragraph with the necessary modifications.
7. The Licensed Technologist shall not supervise and direct the practice of architecture of a holder of a certificate of practice issued under Section 14, 15, 16, 17 or 18 of the *Architects Act* that provides architectural services to the public other than architectural services as set out in paragraph 1 of this policy.

#### **TERMS, CONDITIONS AND LIMITATIONS OF CERTIFICATE OF PRACTICE**

1. Where a Licensed Technologist applies to the Registrar for the issuance of a certificate of practice, the certificate of practice shall be subject to the same terms, conditions and limitations as the license, but no certificate of practice shall be issued to the Licensed Technologist unless he or she has agreed to waive the right to a hearing by the Registration Committee under Section 25 of the *Architects Act*.

*Rev. January 2010*

**Your Application for the Advanced Standing Program should include the following:**

1. Completed, signed Application;
2. Proof of Membership with OAAAS. Those candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing process;
3. Project Summary Forms for each of the required five projects;
4. Candidate Reference Form with the names of two (2) architects or one (1) architect and one (1) Licensed Technologist OAA;
5. Payment of Fees form;
6. Resumé / Curriculum Vitae (CV)

**NOTE:** A Licensed Technologist OAA candidate must:

- Be a Canadian Citizen; **or**
- Hold the status of a permanent resident of Canada;
- Must be a member in good standing with OAAAS

**GENERAL**

1. All sections of the Application are to be completed and should be typed or printed. The original form must be returned. An Application received via facsimile will not be accepted.
2. All documentation submitted will be verified.
3. **Fees**  
The fees are set out on the Payment of Fees form. Please note that payment of fees must be by, cheque, bank draft, money order. Fees are set out in Canadian funds and include HST.

**COMPLETION OF THE APPLICATION**

**B. MEMBERSHIP INFORMATION**

Please enclose proof; a photocopy of Acceptance Letter or Certificate of OAAAS membership.  
*Those candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing Program.*

**C. CANDIDATE ELIGIBILITY**

With respect to questions 1, 2 and 3 please check **ONE** box where applicable;  
All Candidates are required to answer the 'All Candidates' question.

**A. IDENTIFICATION**

1. Name in Full: \_\_\_\_\_  
Surname First Name Middle Name(s)

Please check one  Miss  Mrs.  Ms.  Mr.

2. Residence Address: \_\_\_\_\_  
Street Apt. No.

\_\_\_\_\_ City Province Country Postal Code

3. Place of Business: \_\_\_\_\_  
Firm Name

\_\_\_\_\_ Street Suite No.

\_\_\_\_\_ City Province Country Postal Code

4. (a) Address for Correspondence: Residence [ ] **or** Business [ ]

5. Residence Tel: ( ) \_\_\_\_\_ Business Tel: ( ) \_\_\_\_\_

6. E-mail: \_\_\_\_\_

**B. MEMBERSHIP INFORMATION**

Membership in Good Standing with OAAAS (Attach copy of proof):

Membership	Number
OAAAS	

**Candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing Program.**

**C. CANDIDATE ELIGIBILITY**

1. I have ten (10) years experience required for senior architectural technicians and technologists who have a (2) year college/university diploma/degree or equivalent (12-2 = 10), **or** Yes  No
2. I have nine (9) years experience required for senior architectural technicians and technologists who have a three (3) year college/university diploma/degree or equivalent (12-3 = 9), **or** Yes  No
3. I have eight (8) years experience required for senior architectural technicians who have a four (4) year college/university diploma/degree or equivalent (12 - 4 = 8). Yes  No

**ALL CANDIDATES:** In addition, I have **940 hours** of work experience in Ontario, in specific categories, within the three consecutive years immediately prior to submitting an Application for Advanced Standing: Yes  No

- Worked under the personal supervision and direction of an architect, OR
- Completed projects through qualification with the Ministry of Municipal Affairs and Housing in the Designer (Small Building) category and a Building Code Identification Number. I confirm I am registered with the Ministry as a sole proprietor or as principal of a firm.

**D. SUBMISSION CHECKLIST**

- 1. I have attached one *Project Summary Form* for each of five projects. (Submit 5 Separate *Project Summary Forms*) Yes  No
- 2. I understand that, upon review of my *Project Summary Forms*, three projects will be selected by the Committee for detailed review at my interview. Yes  No
- 3. I have attached a *Candidate Reference Form* with the names of two architects or one architect and one Licensed Technologist OAA who have consented to act as my references. Yes  No
- 4. I have attached documentation indicating that I am a member in good standing with OAAAS; or *Those candidates who are not members must apply simultaneously to OAAAS and the Advanced Standing Program.* Yes  No
- 5. I have attached my resumé / curriculum vitae, which includes an overview of education and experience in accord with Candidate Eligibility. (**Section C above**) Yes  No
- 6. I have included the Payment Form with applicable Fees. Yes  No

**E. DECLARATION**

I DO SOLEMNLY DECLARE:

THAT I am applying for Advanced Standing as an Experienced Candidate to become a Licensed Technologist OAA licensed with Terms, Conditions and Limitations under the *Architects Act* of the Province of Ontario;

THAT I am member in good standing with OAAAS; **or**

THAT I am applying simultaneously to OAAAS and the Advanced Standing Program;

THAT I comply with the Candidate Eligibility (**Section C above**);

THAT I have read and agree to comply with the Program Guide requirements for Advanced Standing Program.

AND I MAKE THIS solemn declaration conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

**FOR OAAAS USE ONLY**



## Reference Form Advanced Standing Program

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Candidate's Name in Full (*please print*)

I am pleased to act as Reference to the above-noted Experienced Candidate for the period of pre-registration as required. I will attest to, if called upon, that the acquisition of experience as defined in the Candidate's Project Summary Forms is verifiable and true.

---

Name of Architect (*please print*)

Signature

Date

---

Name of Architect (*please print*)

Signature

Date

---

Name of Licensed Technologist OAA (*please print*)

Signature

Date



## Payment of Fees Advanced Standing Program

**Candidate's Name:**  
**OAAAS No.:**  
**Date:**

The Ontario Association for Applied Architectural Sciences (OAAAS) accepts payment of fees by cheque, money order and bank drafts (all made payable to the OAAAS). The fees listed below are in **Canadian funds** and include HST.

	Fee	Total
<b>Application Fee</b>	\$ 600.00 + HST	<b>\$ 678.00</b>
<b>Re-applying for interview</b>	\$ 300.00 + HST	<b>\$ 339.00</b>

Payment Method	Please make payment to the order of <u>OAAAS</u> .	
<input type="checkbox"/> Cheque		
<input type="checkbox"/> Money Order		
<input type="checkbox"/> Bank Draft		

**Submissions should be mailed to:**

**OAAAS**  
**c/o OAA**  
**111 Moatfield Drive**  
**Toronto ON M3B 3L6**  
**Attn: Rommy Rodriguez A., OAAAS Administrator**

**Phone: 416.449.6898 Ext. 236**  
**E-mail: RommyR@oaaas.ca**

**PROJECT SUMMARY FORM**

(page 1 of 2)

CANDIDATE'S NAME (please print)

--

**GENERAL**

Project Name:	_____
Location:	_____
Project Type:	_____
Occupancy:	_____
Gross Floor Area:	_____
Number of Stories:	_____
Budget:	_____

Name of Architectural Practice:	_____
Name of Architect PS&D Project:	_____
Candidate's employment relationship with Architectural practice:	_____
Candidate's role on project:	_____
	_____
	_____

**APPROVALS (please describe issues)**

Zoning:	_____
Rezoning:	_____
Committee of Adjustment:	_____
Ontario Municipal Board:	_____
Other:	_____

**ENGINEERING SYSTEMS (please describe)**

Structural:	_____
Mechanical:	_____
Electrical:	_____

**COMPLETION DATE**

Design:	_____
Contract Documents:	_____
Construction:	_____

**LEGEND**

**PS&D:** personally supervising and directing  
**Project Type:** new work, additions, renovations, interior design, master planning etc.  
**Occupancy Type:** assembly, institutional, residential, commercial etc.

**DESCRIBE PROJECT'S BIGGEST CHALLENGE (use supplementary sheet(s) if necessary)**


**PROJECT SUMMARY FORM**

(page 2 of 2)

CANDIDATE'S NAME (please print)

**EXPERIENCE**

For each of the following 15 activities:

1. Describe your specific involvement (refer to EXPERIENCE AREA DESCRIPTIONS)
2. Indicate the percentage (%) of the activity for which you were responsible.

A. Design and Construction Documents	Percent
1. Programming	
2. Environmental	
3. Schematic Design	
4. Coordination	
5. Building Cost Analysis	
6. Code Research	
7. Design Development	
8. Documents	
9. Materials Research	
10. And Coordination	
<b>B. Administration</b>	
11. Negotiation	
12. Office	
13. Site	
<b>C. Management</b>	
14. Project Management	
15. Office Management	

**DESIGN DECLARATION (use supplementary sheet if necessary)**

1. Were you solely responsible for the design of this project?	<input type="checkbox"/> yes	<input type="checkbox"/> no	
If yes, did you interface directly with the client?	<input type="checkbox"/> yes	<input type="checkbox"/> no	
2. Please explain the extent of your involvement with the client			