

## **SURVEY REVIEW DEPARTMENT (SRD) ANNUAL MANAGER'S REPORT FOR YEAR 2021**

Presented by Paul C. Wyman at the AOLS Annual General Meeting March 2022

Tom Packowski OLS, MANAGER SURVEY REVIEW DEPARTMENT January to September, 2021

Paul C. Wyman OLS, MANAGER SURVEY REVIEW DEPARTMENT September to December, 2021

While I have the privilege of preparing and presenting the 2021 SRD Annual Report, much of this year's hard work was completed by Tom Packowski who retired as manager in September of 2021. I inherit a department that is financially solvent, well run and meeting its mandate. Tom has not completely retired as he has become the SRD consultant undertaking the annual Systematic Reviews.

The Survey Review Department (SRD) operates under the Inspection Program of the Surveyors Act, O. Regulation 1026, Section (40). The SRD is totally funded by the sales of *Plan Submission Form Stickers*, currently at a cost of \$19 per sticker. With the 30% increase in sticker sales this past year, the department operated at a surplus for 2021, so no increase is anticipated in the near future.

While both physical and digital stickers are available, we are promoting a transition to digital stickers. There are a few advantages, such as:

- There is little or no delay in obtaining the digital stickers – we send them to you by e-mail;
- There is a cost savings to the AOLS in printing, shipping, and labour;
- There is a cost savings to the survey firm for not having to apply a physical sticker to a plan print and transport it to the LRO.

Physical or digital, Firms must log the use of individual sticker numbers as set out in By-Law 2020-02.

From revenues we pay the overhead and salaries of staff – manager Paul Wyman, administrative officer Sheila Lavina, assistant examiner Herman Bernardo, and OLS field examiner Al Worobec. Revenues also cover the fees for OLS Comprehensive Review Consultants - Drew Annable, Phillip Hofmann, Danny Quinlan, Ernest Sperling, and Chester Stanton and OLS Systematic Review Consultant Tom Packowski.

SRD financial reporting is based on the AOLS fiscal year which runs from November 01 to October 31. We select the firms for the 5-year Comprehensive Review cycle and the plans for the Systematic Reviews using the calendar year in keeping with our legislation. Please note that the Comprehensive Reviews start with a field inspection of at least one plan under review for each Firm. To minimize costs, we normally start these inspections in the spring and do not complete the Comprehensive Reviews until March / April of the following year.

In the fall of 2021, AOLS initiated a change in the storage and selection of plans from the land registration offices (LRO). Currently, we receive the hard copy plan containing the Plan Submission Sticker and these are stored in several file cabinets at the AOLS office. These are then used as part of the process to select projects for review. This is a time consuming and space consuming process. We have contracted with a supplier to receive and index digital copies of the plans. Staff can view the plans and index 'online' and download the plans as necessary. This will reduce our labour costs and save badly needed space at the AOLS office. This change will take place in 2022 and will result in a small change in the use of Plan Submission Stickers. All plans will record the Plan Submission Sticker number in a manner similar to the current process for 'digital' plans submitted to the LRO.

AOLS has also undertaken the creation of a new internal database that will contain the SRD numeric review data that is now stored in individual reports. The combination of these two new processes will improve SRD analysis to better direct our work. Additionally, it will help identify subject matter for the AOLS Continuing Education Program.

I wish to reinforce, *plead* with the membership to take the time to provide all the relevant data for the Comprehensive Reviews. The consultant can only base their review on the material provided. If materials are not provided, the reviewer can only assume it does not exist or was not used for the project. When Firms provide data after the initial review, it may take the consultant several hours to redo the review incorporating this new data. AOLS Council By-Law 94-3 provides that SRD may charge a fee of \$500.00 to recover costs for the ‘late’ submission of requested review materials. This is a waste of YOUR money. Let’s get it right the first time!

For the 2021 year, the SRD opened 72 Comprehensive Reviews, which is above average and added 6 referral reviews from the Registrar. This has put a strain on our capacity but at the writing of this report (end of January) we have completed 46 (64%) and substantially completed 85%. We expect the workload for 2022 to be approximately 40 Comprehensive Reviews – a more average number. As noted previously, the new AOLS database will allow us to undertake improved analysis in future years, but in preparation for the move to that database, I have been able to extract some data from the 46 comprehensive reviews completed for 2021.

- 6 (13%) reviews have been referred to the AOLS Registrar for ‘sub-standard’ work;
- 72% had at least a minor issue with research (generally LRO research);
- 37% had at least a minor issue with underlying surveys research (generally field notes)
- 98% had at least a minor issue with field procedure
- 74% had at least a minor issue with measurement verification / quality control;
- 46% had at least a minor issue with plans recording the method of survey;
- 70% had at least a minor issue with survey reports.

AT 98%, field survey issues are the most cited and survey firms need to focus on staff training to improve field note recording and field survey procedures.

We have completed 254 Systematic Reviews for 2021. The following are a few statistics based on issues noted in those reviews:

Year	Plans Checked	Integration (%)	Method/Evidence (%)	Minor/Comment (%)
<b>2021</b>	<b>254</b>	<b>27 (11%)</b>	<b>08 (3%)</b>	<b>61 (24%)</b>
2020	205	26 (13%)	08 (4%)	45 (22%)
2019	297	41 (14%)	13 (4%)	61 (21%)
2018	254	50 (20%)	15 (6%)	52 (20%)
2017	245	59 (24%)	22 (9%)	118 (48%)
2016	248	99 (40%)	22 (9%)	111 (45%)

A cursory examination of the Systematic Review statistics indicates improvement in plan preparation over the years. We can further improve with continued attention to regulations / best practices and improved understanding of the 'survey integration' process.

Both the Systematic and Comprehensive Reviews are undertaken by our consultants who base their comments on the common law & court decisions, provincial statutes & regulations, and AOLS by-laws & best practices. To assist surveyors and their staff, much of this information is available on the AOLS website. Additionally, there are many checklists prepared by the AOLS Professional Standards Committee available on the AOLS website (section on Survey Practice under Best Practices), including a construction survey checklist.

Over the past 2 years, the Department has had to adjust to the realities of COVID 19 resulting in virtual office visits, mainly using 'Zoom' technology. We appreciate that Zoom meetings require audio / video technology and are not always ideal. I thank the membership for their cooperation and believe that this process has not affected the integrity of the Reviews themselves.

The Comprehensive Review process concludes with an invitation to the Firm to take part in an opinion survey regarding their experience with the process. These opinion surveys are confidential if the Firm so chooses. The surveys are sent to the **SRD Committee** where they are reviewed and tabulated. Matters of particular importance are raised by the Committee at the regular meetings held between the SRD Committee and the SRD Manager. I encourage you to take part in the opinion survey as part of your Comprehensive Review. Your comments and suggestions help improve our processes. Thank-you for the work of the Survey Review Department Committee (Chair Gabriel Laframboise) and for their guidance and oversight during this last year.

Respectfully,

Paul Wyman, OLS  
Manager, AOLS Survey Review Department