

SURVEY REVIEW DEPARTMENT ANNUAL MANAGER'S REPORT 2025

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Presentation for March 2026 AGM in Markham

I have just completed my first year serving the AOLS as Deputy Registrar and Manager of the Survey Review Department (SRD). This dual role has provided me the opportunity to support the Association from member registration to peer reviews and continuing education as we transition as a professional regulator to meet the changes demanded of our profession.

The Survey Review Department operates under the authority of the Surveyors Act, O.Regulation 1026, s.40 (Inspection Program) to complete practice reviews of firms. The legislation requires that each firm undergo an annual Systematic Review and a Comprehensive Review within five (5) years of the firm's practice. The Systematic Reviews involve a desktop review of at least one plan per firm on an annual basis. Plans are selected randomly from publicly filed Plans of Survey available through the Provincial Survey Records Index (PSRI) Survey Manager portal. Such plans are submitted electronically on a regular basis to the PSRI from the various land registry offices across the province to support the SRD program. Alternatively, the Comprehensive Reviews involve detail reviews of a minimum four (4) projects per firm for compliance with relevant legislation and applicable industry practice standards and guidelines. These reviews include a field examination and an in-person or virtually attended office visit to review the Report. The reviews are completed by Council approved licensed OLS members fulfilling the role of 'SRD Consultants' reporting directly to the firms with an emphasis on education. Copies of the Reports are filed with the SRD Manager as per AOLS retention policy.

The SRD program budget is self-funded by Plan Submission Form Sticker sales offered virtually (rather than the original physical stickers) to member firms. Our sticker sales for the past fiscal year 2024/2025 were lower than projected at 29,440 (*compared to 34,770 in fiscal 2023/2024*), resulting in a budget deficit of roughly \$112,000. The decline is due in part to poor sticker sales during the global trade turmoil that affected business confidence in April and May 2025. The Association has set aside funds from prior department surpluses to cover any potential near term funding requirements, if needed.

Another SRD department budget deficit has been projected for fiscal year 2025/2026, given on-going geopolitical events and trade disruptions that blur our ability to project future business trends and demands for professional surveyors' services. The cost of \$19/sticker

(plus applicable taxes) as set out by AOLS by-law #2020-02 may need to be reviewed to fund the program, should this trend continue.

In accordance with AOLS by-law #2023-01, the SRD started issuing virtual plan stickers on January 1st, 2025 and ceased the issuance of physical stickers.

By April/May 2025, our Provincial Survey Records Index (PSRI) administrator, iLookabout completed the development and implementation of an initiative begun by our previous SRD Manager, Paul Wyman to add a tool for facilitating 'data transfers' through the PSRI between firms and the department. The tool provides a template for firms to submit their data digitally for easy download in formats required by SRD staff and their consultants to support Comprehensive Reviews.

The remaining files from the 2024 Comprehensive Review program were completed by May 2025. The 2025 Comprehensive Review program began concurrently with the completion of the 2024 files and comprised 48 firms (including one Registrar's Referral related to the 2024 program and nine Referrals related to fulfilling 'conditions' of newly issued OLS Certificates of Authorization). Five (5) firms were removed due to office closures and/or 'no sticker' usage. The remaining forty-three (43) firm reviews are in progress and are due for completion by May 2026. Approximately 80% of firms submitted their data digitally rather than hard-copy submissions, resulting in improved productivity in staff and consultant's processing of the reviews. The reviews involved field examinations on 133 sites (67% of all plans) by the SRD Field Examination team. At this time, only one (1) file has been referred to the Registrar due to a poor review.

The common issues being highlighted in this year's Comprehensive Reviews appear to be consistent with previously communicated topics namely:

- lack of documentation of research efforts and/or insufficient research;
- lack of documentation related to field procedures (field notes) reflecting the effort required for 'best evidence', redundant field measurements and independent verification;
- non-compliant monumentation;
- lack of documentation related to client correspondence and closing project Reports;

Our field examination team have summarized some observations for the past year:

- Overhead Wires, guy anchors and utility poles & pedestals not being shown in the field notes or Plan;
- Missed public utility features and sidewalks crossing the street limit on to private lands;

- Eaves on dwellings, garages, sheds, carports & structures that are close to a known boundary are not shown in the field notes. (approx. 50% of the time);
- Fence ties & location not correctly shown on the Plan when relying solely on point codes with no sketch of features in the field notes;
- Fences off the boundary due to trees/shrubs are shown 'on line', field notes are silent regarding the tree features;
- The condition of monuments potentially disturbed, bent or exposed 0.3m above grade;
- Older remains of fence, tree lines, hedge features not shown as possible evidence of a boundary;
- Field notes missing monuments found in asphalt or concrete or driveway/sidewalk feature which may be close or extending over a boundary;
- Field notes missing a mutual access lane / driveway to rear yard, where no easement exists on title.

In spite of the concerns raised above, we are seeing improvements in defined business practices related to quality control protocols and awareness of 'best practices' to avoid errors and liability risk.

The 2025 Systematic Review program has involved 160 plan reviews to date. Six (6) plans merited follow-up correspondence to identify issues and request acknowledgement from the member/firm for the purpose of improving compliance in the future. Additional 2025 Systematic Reviews are scheduled for completion until the end of February 2026 before commencing the 2026 Systematic Review program.

There are on-going efforts to 'revision' the peer review program to meet expectations of Council, the membership and the public towards maintaining sustained confidence in our profession. The Survey Review Department Committee was busy reviewing topics related to expanding the peer review program to include non-cadastral branches of professional surveying services (*photogrammetry, geodesy, hydrography and geographic information management*). Advanced discussions are taking place with 'subject matter experts' on expanding SRD's educational role and integrating reviews of non-cadastral services with a priority on member involvement. I wish to thank the Committee members for the valuable feedback provided by Julia Meldrum-Smith, OLS and George Bracken, OLS (co-Chairs), Paul Francis, OLS (C of R representative), Peter Nielsen, OLS (Council representative), Andre Roy, OLS and Gary Auer, OLS. The Committee meetings are also supported by Al Jeraj, OLS (Executive Director), Linda Latham, P.Eng. (Registrar) and Felicia Harris (AOLS Administrative Support).

Our work within the SRD team is supported by AOLS staff Alan Worobec, OLS (Field Examiner), Herman Bernardo (Assistant Field Examiner), Felicia Harris (Administrative Support), Sheila Lavigna (Administrative Support) and Paul Wyman (former SRD Manager). We work closely with external SRD Consultants Phillip Hoffman, OLS, Dan Quinlan, OLS, Ernie Sperling, OLS, Chester Stanton, OLS and Tom Packowski, OLS (Systematic Review Manager).

I wish to thank Chester, Sheila and Tom for their valued service to the department these past few years and wish them well in their future endeavours. I am grateful to Paul Wyman and Tom Packowski for their advice and mentorship as I transitioned into this role and look forward to continuing to work with them on the Professional Standards Committee and Continuing Education Committee.