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**TELECONFERENCE/VIRTUAL MEETING**

**ARCHITECTS SECTION**  
**EXAMINING BOARD OF ARCHITECTS, LANDSCAPE ARCHITECTS,**  
**PROFESSIONAL ENGINEERS, DESIGNERS AND LAND SURVEYORS**  
**Room 121A, 1400 E. Washington Avenue, Madison**  
**Contact: Brittany Lewin 608-266-2112**  
**September 22, 2015**

*The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a description of the actions of the Board.*

**AGENDA**

**9:00 A.M**

**OPEN SESSION – CALL TO ORDER – ROLL CALL**

**A. Adoption of Agenda (1)**

**B. Administrative Matters**

1. New Board Member (2-3)

**C. Credentialing Matters – Discussion and Consideration (4-21)**

1. Intern Development Program Update

**D. Legislative/Administrative Rule Matters – Discussion and Consideration**

1. Intern Development Program Experience Documentation Method Comments (22)
2. Pending Legislative and Administrative Rule Matters Update

**E. Public Comments**

**ADJOURNMENT**

**State of Wisconsin  
Department of Safety & Professional Services**

**AGENDA REQUEST FORM**

<b>1) Name and Title of Person Submitting the Request:</b>  Nifty Lynn Dio, Bureau Assistant		<b>2) Date When Request Submitted:</b>  09/17/2015  Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting	
<b>3) Name of Board, Committee, Council, Sections:</b>  Architect Section			
<b>4) Meeting Date:</b>  09/22/2015	<b>5) Attachments:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<b>6) How should the item be titled on the agenda page?</b>  New Board Member	
<b>7) Place Item in:</b> <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session	<b>8) Is an appearance before the Board being scheduled?</b>  <input type="checkbox"/> Yes ( <a href="#">Fill out Board Appearance Request</a> ) <input checked="" type="checkbox"/> No	<b>9) Name of Case Advisor(s), if required:</b>  N/A	
<b>10) Describe the issue and action that should be addressed:</b>  Welcome New Board Member, Steven Wagner.			
<b>11) Authorization</b>			
<b>Nifty Lynn Dio</b>		<b>9/17/2015</b>	
Signature of person making this request		Date	
Supervisor (if required)		Date	
Executive Director signature (indicates approval to add post agenda deadline item to agenda)		Date	
<b>Directions for including supporting documents:</b> 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.			



**SCOTT WALKER**  
**OFFICE OF THE GOVERNOR**  
**STATE OF WISCONSIN**

P.O. Box 7863  
MADISON, WI 53707

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**GOVERNOR'S APPOINTMENT**

**NAME:** Mr. Steven Wagner

**MAILING ADDRESS:** [REDACTED]

**E-MAIL ADDRESS:** [REDACTED]

**RESIDES IN:** Burlington, WI

**TELEPHONE:** [REDACTED]

**OCCUPATION:** Lead Architect  
Anderson Ashton Design-Build

**APPOINTED TO:** Examining Board of Architects, Landscape  
Architects, Professional Engineers,  
Designers and Land Surveyors  
Architect 2

**TERM:** A term to expire July 1, 2017

**SUCCEEDS:** Mr. Lawrence J. Schnuck

**SENATE CONFIRMATION:** Required

**DATE OF APPOINTMENT:** February 19, 2015

**DATE OF NOMINATION:** February 19, 2015

## MEMORANDUM

Dennis S. Ward, AIA, NCARB  
President/Chair of the Board  
Florence, South Carolina

**TO:** NCARB Member Boards

Kristine A. Harding, AIA, NCARB  
1st Vice President/President-Elect  
Huntsville, Alabama

**FROM:** Dennis S. Ward, AIA, NCARB  
President/Chair of the Board



Gregory L. Erny, NCARB, AIA  
2nd Vice President  
Reno, Nevada

**DATE:** July 1, 2015

David L. Hoffman, FAIA, NCARB  
Treasurer  
Huntsville, Alabama

**RE:** INTERN DEVELOPMENT PROGRAM  
Experience Portfolio Documentation Method  
Member Board Comment Period

Terry L. Allers, AIA, NCARB  
Secretary  
Fort Dodge, Iowa

Dale McKinney, FAIA, NCARB  
Past President  
Sioux City, Iowa

## INTRODUCTION

David R. Prengaman, AIA, NCARB  
Director, Region 1  
Providence, Rhode Island

The NCARB Board of Directors is considering development of a new program and is seeking input from Member Boards and other related organizations. After over a year of deliberation by the Board, this concept was introduced to Member Boards at the 2015 Regional Summit in Long Beach, California. During the recent 2015 NCARB Annual Business Meeting, workshops were held to better inform our membership about this proposal and begin the process of garnering feedback.

Susan B. McClymonds, AIA, CSI  
Director, Region 2  
Amsterdam, New York

Comments from our Member Boards will be received through September 29<sup>th</sup>. Although the comment period will still be open, our Board of Directors will review comments received to date during their September meeting. We will then seek additional feedback from Member Board Members through virtual meetings to be offered in October in order to assure sufficient engagement by the Member Boards with this proposal. We hope that the Member Board feedback through the summer and fall will enable us to make a final determination on this program when our Board of Directors meets again in December, 2015.

Alfred Vidaurri Jr., FAIA, NCARB, AICP  
Director, Region 3  
Fortworth, Texas

Stephen L. Sharp, AIA, NCARB  
Director, Region 4  
Springfield, Ohio

Bayliss Ward, NCARB, AIA  
Director, Region 5  
Bozeman, Montana

Robert M. Calvani, NCARB, AIA  
Director, Region 6  
Albuquerque, New Mexico

Your participation in the comment period as well as the virtual meetings is important. The Board of Directors would like to assure that we have heard from our membership on this issue and that they are developing a program that will be valued and utilized by our Member Boards. If your Board has not scheduled a meeting during this comment period, we urge you to convene a special meeting to provide comment. If your Board is unable to meet during the comment period and provide collective feedback, we encourage you to submit your individual comments and plan to participate in the virtual meetings.

Kingsley Johnson Glasgow  
Member Board Executive Director  
Little Rock, Arkansas

John G. Cameron Jr.  
Public Director  
Grand Rapids, Michigan

Michael J. Armstrong  
Chief Executive Officer

The following pages provide a detailed description of the program. There is much information contained in this document, so please read carefully. Questions regarding the proposal should be directed to Harry Falconer ([hfalconer@ncarb.org](mailto:hfalconer@ncarb.org)) or Derek Haese ([dhaese@ncarb.org](mailto:dhaese@ncarb.org)).

### **BACKGROUND**

The Intern Development Program reporting requirement (known as the “six month rule”) was implemented in July, 2010. At that point, no experience older than eight months could be reported and used to satisfy the IDP experience requirements. Last year, the Council expanded the reporting of experience to allow 50% credit for experience up to five years in the past. According to our Member Boards, there is a cohort of individuals who have work experience that falls outside of the current reporting requirements, i.e. more than 5 years old. This proposed program is intended to provide a path for completing the experience requirement for those who:

- left the profession and would like to come back.
- did not document their IDP experience with NCARB
- did not pursue licensure in a timely fashion, e.g. Project Managers
- can otherwise meet licensure requirements including education and examination

Past President Dale McKinney remarked at the Annual Business Meeting, “We all know folks who stepped away from a career in architecture and want to come back. In some cases, we work with people who have a degree from a NAAB-accredited program, loads of experience, and now want to move up from being a project manager to a licensed architect. However, their IDP-relevant experience is more than five years old – and thus outside of the reporting requirements for IDP.”

The NCARB Board of Directors agrees a gap exists in our program. Therefore Council staff was directed to develop a concept that would allow individuals to submit experience that identifies proficiency in the IDP experience categories that fall outside of the current reporting requirement. Staff was given two directives:

- Protect the traditional IDP path, or whatever the future program is called, as the preferred experience path.
- Develop a conceptual program that will not be overly complicated and financially burdensome.

This concept was first introduced to the Board of Directors two years ago when we launched the Broadly Experienced Special Project Team. An outline for this program was developed through numerous discussions during the past year. NCARB staff have presented research and presentations of a conceptual program to the Board. The facilitation of licensure is a primary goal for NCARB and this program is one of many that redefines the path to licensure without sacrificing the value or rigor that we place on experience, education, and examination.

We have learned some valuable lessons in the past year regarding introduction of new or revised programs. As a result, we sought initial reaction and feedback from our Member Board Members at the Annual Business Meeting through five workshops.

Over 175 member board members and member board executives attended the workshops. Initial reaction to the proposed concept and its components was positive by a clear majority. Feedback from the attendees was similar in nature at each session:

- They support the concept of a program that will allow persons to document experience that falls outside of the current IDP reporting rules.
- They like the concept that the current architect supervisor or a mentor will sign off on the experience. They noted this concept could be enhanced by adding a minimum number of years that the supervisor/mentor has known the applicant.
- The majority agree that documentation of work product to demonstrate competency is better than documentation of hours. They noted that applicants may not be able to obtain actual work samples from previous employers. The program will need to define options for all applicants.
- They recommended the Council develop a robust supervisor/mentor training program to support this program.

We now continue to seek your engagement on this proposal through two very important steps:

- Member Board 90-day Comment Period
- Virtual meetings with our Member Board Members to be held in early October

These steps are being taken because implementation of this program will require a change to the *IDP Guidelines*. Changes at this level require a vote by the Board of Directors.

Subsequently, our Board has indicated a desire to take action on this proposal before the end of this calendar year. I assure you however, that no Board vote will be taken until sufficient discussion and feedback has occurred.

I want to strongly urge you to provide your feedback over the summer during this comment period, and again when we hold virtual meetings this fall. Your Board of Directors and I thank you in advance for your consideration and thoughtful insight on this proposed program.

## THE PROPOSED PROGRAM

### *EXECUTIVE SUMMARY*

In August 2013, an NCARB multi-departmental team was formed to thoroughly analyze the need, identify options, and develop an approach for individuals to document valid work experience fulfilling the spirit of the Intern Development Program (IDP) but falling outside the limits of current IDP reporting requirements. Currently, licensure applicants can earn full credit for experience reported within eight months, and 50 percent credit for experience earned beyond eight months and up to five years.

NCARB is committed to supporting the facilitation of licensure. NCARB is committed to our message that “experience is experience.” There is a group of individuals educated, trained, and experienced in architecture who, for whatever life event occurred, did not pursue licensure. These individuals now want to join fully in the profession through licensure. They can meet their jurisdiction’s education requirement, and they are willing to take the Architect Registration Examination® (ARE®); however they are negatively impacted by our current IDP reporting requirements.

NCARB’s records estimate that about 12,000 professionals in our system currently show experience older than five years, not counting the others who have never engaged with experience reporting. A recent poll of this group found that 80 percent would be interested in such a program if it becomes available.

The research team was tasked with identifying ways to be more inclusive of intern architects’ path to initial licensure while ensuring the process is objective, attainable, sustainable, and defensible. The team leaders presented thoughts, concepts, and approaches to the Board of Directors at the December 2013; and April, September, and December 2014 meetings. In December the Board directed the research team to develop proposed program elements and requirements, with the intent to engage the Member Boards at the 2015 Annual Business Meeting. These elements include the proposed audience, proposed eligibility requirements, and proposed programmatic details and processes:

#### Eligibility:

- Work experience occurred outside of current IDP reporting requirement (i.e. older than 5 years)
- Work experience that meets the current IDP requirements (tasks, etc.)

## Documentation of Experience:

- Work history, including role, project types, project descriptions, project budgets, etc.
- Work product samples demonstrating competent performance of IDP tasks in each of the six practice categories

## Certification/Affirmation of Competency:

- Current architect supervisor
- Architect mentor who is NCARB certified

## Process:

- Work samples of valid experience will be submitted through automated e-portfolio system to the supervisor or mentor

NCARB is committed to supporting the facilitation of licensure. This program can provide a pathway for design professionals (e.g. project managers, project designers) who cannot complete the experience hours in the IDP experience areas based on their current employment role and responsibilities, though work experienced performed beyond the limits of the reporting requirements would meet today's requirements.

NCARB is committed to our message that "experience is experience" and firmly maintains that timely reporting is an essential element of the IDP. This proposed program recognizes that the implementation of the reporting requirement was a substantial benefit validating the IDP. The facilitation of licensure is a primary goal for NCARB and this proposal is one of many that redefines the path to licensure without sacrificing the value that we place on experience, education, and examination.

*PROGRAM OVERVIEW*

To participate, an applicant will need to validate that they have substantial past experience that meets the current requirements of the IDP. The proposed approach requires detailed, verified documentation to support the claim that experience gained outside of the IDP reporting requirements has been completed competently and satisfies the current IDP requirements. Specifically, applicants will need to do the following:

- Document work history since graduation to present.
  - a. Include brief description of projects (type, size, cost, duration, and role on projects.)
- Document project work product to demonstrate acquisition of knowledge/skills and competent performance of the expected tasks.
  - a. NCARB will develop descriptions and a format for applicants to follow.

- Submit documentation to a current architect supervisor or mentor who is NCARB certified.

The applicant must be able to provide all required information and documentation for review and certification/affirmation of competence by their current supervisor or mentor.

#### *ELIGIBILITY*

The applicant must have:

- Work experience that occurred outside of current IDP reporting requirement (i.e. older than 5 years)
- Work experience that meets the current IDP requirements (tasks, etc.)

#### *Rationale:*

All persons participating in the IDP were required to comply with the IDP reporting requirements (a.k.a. six month rule) as of July 1, 2010. There are individuals who have not reported experience in accordance with the IDP reporting requirement, but have substantial experience that is further in the past than the current IDP reporting requirement allows. While these individuals may currently be working in architecture or a related field, their current role and responsibilities will not allow them to perform tasks that are required by the IDP.

#### *DOCUMENTATION OF EXPERIENCE*

Each applicant will be required to provide detailed, verified documentation to support his/her claim that their experience gained outside of the IDP reporting requirements has been completed competently and satisfies the current IDP requirements.

The applicant will be required to document their complete work history. The information required will include:

- Employer Name
- Employer Address
- Dates of Employment
- Position(s) Held
- Roles and Responsibilities

#### *Rationale:*

The current architect supervisor or mentor certifying/affirming the competence of the applicant will be have a 'complete picture' of the applicant's experience. This will allow for a more comprehensive look at and consideration of one's overall experience.

The applicant will be required to list projects they are submitting to their supervisor to document satisfaction of the current IDP requirements: The information required will include:

- Project Name
- Project Type
- Project Size
- Project Budget
- Project Duration
- Project Description
- His/her Role in the Project
- Identify relevant IDP Practice Areas (reason for inclusion)

*Rationale:*

The current architect supervisor or mentor certifying/affirming the competence of the applicant needs to have a 'complete picture' of the projects the applicant is submitting in support of their prior experience. This will allow for a comprehensive and informed review and consideration of one's experience in the practice areas defined by the IDP.

The applicant will be required to submit work samples that represent competent performance of the tasks identified in six practice areas of the overhauled IDP that will be implemented in July 2016. The following charts reflect the required tasks in each IDP practice area. Further, the charts provide the applicant with recommended examples of work products they may choose from to demonstrate competent performance of each of the tasks:



Experience Portfolio Documentation Method	
Practice Management	
Tasks	Work Sample Demonstrating Competent Performance
Adhere to ethical standards and codes of professional conduct	Letter from supervisor/mentor; letter to or from client; letter to or from consultant; brief written report addressing this topic
Comply with laws and regulations governing the practice of architecture	Letter from architect supervisor; building or planning permit; brief written report addressing this topic
Prepare final procurement and contract documents	Client contract; consultant contract; RFP; RFQ
Understand implications of project delivery technologies	Sketches; digital presentations; letter to client recommending a type of project delivery
Participate in professional development activities that offer exchanges with other design professionals	Continuing education transcripts; evidence of professional presentations given at conferences; professional development conference registrations
Understand implications of policies and procedures to ensure supervision of design work by architect in responsible charge/control	Letter from architect supervisor; quality control procedure documents; brief written report addressing this topic
Maintain positive work environment within firm that facilitates cooperation, teamwork, and staff morale	Participation in office committees; leadership in project team; professional development review
Develop and maintain effective and productive relationships with clients	Reference letter from client; project close-out letter; project follow-up
Develop professional and leadership skills within firm	Participation in office committees; professional development review; certificate of completion from a leadership development program
Prepare proposals for services in response to client requirements	RFP sections; pre-proposal meeting minutes; research documents/findings depicting insight on client requirements
Participate in community activities that may provide opportunities for design of facilities that reflect community needs	Photos of events attended; information surveys written by applicant; letter from leader of community activity describing candidate's role
Develop procedures for responding to contractor requests (Requests for Information)	Checklist for RFI response, plus RFI response; documentation of conversations with client and/or firm leadership on process documentation
Prepare marketing documents that accurately communicate firm's experience and capabilities	Marketing proposal or brochure prepared by applicant; PowerPoint (or similar) presentations; evidence of online or virtual media demonstrating marketing capabilities

Establish procedures for documenting project decisions	Code checklist or similar document for a project; meeting minutes; examples of template forms (RFI, change orders, meeting minutes, site visit documentation, etc.)
Develop procedures for responding to changes in project scope	Checklist for scope change, CO request to client; examples of template forms (RFI, change orders, meeting minutes, site visit documentation, etc.)
Establish procedures to process documentation during contract administration	Request for information; notice of clarification; shop drawing logs; punchlist; similar contract administration documents



Experience Portfolio Documentation Method	
Project Management	
Tasks	Work Sample Demonstrating Competent Performance
Participate in pre-construction, pre-installation and regular progress meetings with design team	Sign-in sheet demonstrating candidate was in attendance; agenda; meeting minutes
Coordinate design work of consultants	Coordination meeting minutes; correspondence with consultants; letters from consultants describing the candidate's coordination efforts on a project
Determine project schedule	Provide a project schedule depicting internal milestones (quality control, printing, etc.) and external milestones (client receives deliverable, design review meeting date, etc.)
Understand implications of project delivery methods	A letter from candidate to client/firm/design team members indicating the scope of work, fee, and project delivery methods; samples of different delivery contracts for projects
Prepare written communications related to design ideas, project documentation and contracts	Design submittals; emails; letters; written contracts
Monitor project schedule to maintain compliance with established milestones	Project schedules with updates/modifications during project, emails or other relevant documents that describe a recovery plan in the event that more staffing is required
Assist Owner in obtaining necessary permits and approvals	Authority having jurisdiction submittals, comments, comment responses, plan approvals, PowerPoint presentations given to Owner/City Council/any approving authority
Conduct periodic progress meetings with design and project team	Meeting minutes; Outlook meeting invitations distributed to design team; agenda

Identify changes in project scope that require additional services	Correspondence; additional service proposals; contract modifications
Manage information exchange during construction	Data logs (i.e. submittals, RFIs, etc.); meeting minutes; capturing information exchange; site visit reports with photograph excerpts
Perform quality control reviews throughout the documentation process	Quality control review checklists, meeting minutes; red-lined drawings performed by candidate
Determine scope of services	Fee letter and proposal; meeting minutes or documentation of scoping efforts between candidate and owner
Monitor performance of design team consultants	Email or documentation from candidate to consultant's point of contact providing update on performance
Present design concept to stakeholders	PowerPoint presentations; meeting minutes; design models; submittals
Resolve conflicts that may arise during design and construction process	Email or documentation from candidate demonstrating conflict resolution
Manage implementation of sustainability criteria	LEED (or other facilitating program) checklist; documents demonstrating sustainability goals; letter from client describing candidate's sustainability initiatives in project
Determine design fee budget	Fee letter and fee proposals; man-hour estimates
Collaborate with stakeholders during design process to maintain design intent and comply with Owner specifications	A document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings; meeting minutes of coordination meetings
Coordinate design work of in-house team members	A document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings; meeting minutes of coordination meetings
Prepare Architect-Consultant Agreement	A contract; documentation of dialogue between the professional liability insurance provider/attorney discussing contract clauses; documentation of conversations between candidate and consultant
Assist client in determining delivery method for construction of project	Letter from client that describes candidate's efforts; letter of recommendation from candidate to client providing the recommendation
Prepare Owner-Architect Agreement	A contract; documentation of dialogue between the professional liability insurance provider/attorney discussing contract clauses; documentation of conversations between candidate and owner
Perform constructability review to determine buildability, bidability, and construction sequencing of proposed project	Provide a quality control review document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings; relevant checklists

Establish methods for Architect-Client communication based on project scope of work	Job plan that depicts method of communication; phone logs with client; email documentation with client documenting key decisions
Manage modifications to the construction contract	RFI response on formal template; meeting minutes capturing information exchange; change order documentation endorsed by candidate
Perform constructability reviews throughout the design process	Provide a quality control review document that captures candidate's comments after performing an interdisciplinary coordination review; red-lined drawings
Define roles and responsibilities of team members	Project team directory with work plan; design consultant fee letter and scope of services proposal
Manage project-specific bidding process	Pre-bid meeting agenda and meeting minutes, addenda; bid form and log
Evaluate appropriateness of building information modeling (BIM) for proposed project	Project software comparison matrix
Submit schedule of Architect's services to Owner for each phase	A contract that demonstrates the scope of work and deliverables for each phase of design; a schedule of values that assigns a dollar amount relative to the total fee assigned to each design deliverable
Prepare staffing plan to meet project goals	Project work plan with staff assigned; a document from a scheduling program (ex: PlanTrax) that depicts the actual project percent complete versus goal to date percent complete
Assist client in selecting contractors	Letter from client that describes candidate's efforts; contractor request for qualifications; bid log



## Intern Development Program

Experience Portfolio Documentation Method	
Programming & Analysis	
Tasks	Work Sample Demonstrating Competent Performance
Determine impact of applicable zoning and development ordinances to determine project constraints	Zoning & building code analysis documentation
Analyze existing site conditions to determine impact on facility layout	Graphic site analysis, including environmental conditions

Determine impact of environmental, zoning and other regulations on site	Graphic site analysis, including environmental conditions
Prepare diagrams illustrating spatial relationships and functional adjacencies	Bubble diagrams; 3D + section programming models representing vertical adjacencies; program stacking; other programming logics that might inform a concept massing organizational strategy
Prepare site analysis diagrams to document existing conditions, features, infrastructure and regulatory requirements	Graphic site analysis, including environmental conditions and land/topo/utility surveys; 3D models illustrating zoning-compliant massing / programming strategies
Assist Owner in preparing building program including list of spaces and their characteristics	Project programming document, including summary of space square footages; other programming logics that might inform a concept massing organizational strategy
Gather information about client's vision, goals, budget, and schedule to validate project scope and program	Project programming document; agenda or minutes from a client meeting; copy of a 3rd party document to form the basis of design and/or part of owner/architect agreement
Assess environmental impact to formulate design decisions	Graphic site analysis, including environmental conditions, diagrams, preliminary site planning, geotech report, environmental reports
Consider results of environmental studies when developing site alternatives	Graphic site analysis, including environmental conditions, diagrams, preliminary site planning, geotech report, environmental reports
Establish sustainability goals affecting building performance	Meeting minutes from environmental kick-off meeting with clients; LEED checklist; any supplemental budgetary analysis evaluating pros and cons of achieving certain levels of certification
Establish project design goals	Meeting minutes from kick-off meeting with clients establishing aesthetic goals, budget goals, sustainability goals, performance criteria, and time frame
Consider recommendations from geotechnical studies when establishing design parameters	Structural schematics; preliminary site planning; geotech report; environmental reports
Develop conceptual budget	Project budget; cost estimate; written review of contractor's preliminary estimate
Evaluate opportunities and constraints of alternative sites	Site studies with report on pros/cons; preliminary site planning; geotech report; environmental reports
Determine impact of existing transportation infrastructure on site	Graphic site analysis, including transit infrastructure, entry/exit onto streets, setbacks, servitudes/easements, height limitations, FAR, etc.
Review legal documents related to site to determine project constraints	Site analysis with planning & zoning report, including covenants, easements, etc.
Gather information about community concerns and issues that may impact proposed project	Project programming document, agenda or minutes from a client meeting on related subject matter
Evaluate results of feasibility studies to determine project's financial viability	Report/minutes regarding project cost/benefit; preliminary cost opinion/rough order of magnitude; preliminary project timeline

Experience Portfolio Documentation Method	
Project Planning & Design	
Tasks	Work Sample Demonstrating Competent Performance
Perform building code analysis	Written building code analysis or worksheet
Prepare code analysis documentation	Graphic building code plan; completed code search or code analysis document; correspondence regarding code analysis
Select materials, finishes, and systems based on technical properties and aesthetic requirements	Material schedule; cut sheets of products or finishes; listing of clients technical requirements for finishes; materials and systems; examples of completed finish boards.
Prepare design alternatives for client review	Examples of design options which were presented to a client; sketches or other in-progress documents from creating design alternatives.
Oversee design integration of building components and systems	Progress/development drawings; final drawings; coordination meeting minutes
Review local, state and federal codes for changes that may impact design and construction	Completed code analysis document; correspondence with code officials; written documentation of other codes that may impact design and construction.
Determine impact of existing utilities infrastructure on site	Preliminary site narrative; existing site survey; conceptual site plan
Understand implications of evolving sustainable design strategies and technologies	Sustainability diagrams; correspondence with team members or consultants; meeting minutes
Develop sustainability goals based on existing environmental conditions	Sustainability checklist and diagrams; meeting minutes; correspondence regarding sustainability.
Define requirements for site survey based on established project scope	Request for proposal for site survey; site survey contract
Determine design parameters for building engineering systems	Meeting minutes & agendas; questionnaire; correspondence with owner and engineers; design parameters checklist.
Present design ideas to client orally	Design presentation meeting minutes and agenda
Evaluate results of feasibility studies to determine project's technical viability	Documentation of studies; feasibility study follow-up correspondence/reports

Prepare Cost of Work estimates	Floor plans, sections, elevations used for estimates; supporting documentation on sources of pricing
Apply principles of historic preservation for projects involving building restoration or renovation	Meeting notes; historic preservation checklist; correspondence with team members
Develop mitigation options to address adverse site conditions	examples of alternate site plans; correspondence regarding alternate plans.
Design landscape elements for site	Landscape plans; sections, etc. plant options; renderings/3D views



Experience Portfolio Documentation Method	
Project Development	
Tasks	Work Sample Demonstrating Competent Performance
Communicate design ideas to the client graphically	Drawings, sketches, renderings, images, etc. used in correspondence with client.
Prepare submittals for regulatory approval	Exhibits prepared for regulatory reviews; checklists of documents required for regulatory approval.
Communicate design ideas to client with two-dimensional (2-D) computer aided design software	Floor plans, elevations, sections, or other views created specifically for communicating with the client.
Select furniture, fixtures and equipment that meet client's design requirements and needs	Cut sheets of products; clients requirements for furniture, fixtures and equipment; meeting minutes
Communicate design ideas to the client using hand drawings	Sketches and design presentation submittal using hand drawings
Communicate design ideas to client with three-dimensional (3-D) computer aided design software	Renderings, or other views created specifically for communicating with the client.
Update Cost of Work estimates	Floor plans used for estimates; supporting documentation on sources of pricing; revised construction cost estimates



Experience Portfolio Documentation Method	
Construction & Evaluation	
Tasks	Work Sample Demonstrating Competent Performance
Review shop drawings and submittals during construction for conformance with design intent	Returned shop drawings or submittals with comments; correspondence regarding submittals with contractor
Respond to Contractor Requests for Information	RFI responses; correspondence regarding RFI's.
Complete field reports to document field observations from construction site visit	Issued field reports, construction photos, notes from a site visit.
Review results from field reports, third-party inspections, and other test results for conformance with contract documents	Correspondence regarding these documents; examples of returned documents.
Review Application and Certificate for Payment	Examples of approved documents
Manage project close-out procedures and documentation	Punch list; certificate of substantial completion; final application for payment; operation and maintenance manual submittal reviews

*Rationale:*

The 2012 NCARB *Practice Analysis of Architecture* identified the tasks the profession sees as important experience one should develop competence in prior to the independent practice of architecture upon initial licensure. Successful completion of the IDP indicates that the applicant, at the completion of the program requirements, be able to competently perform the tasks in each practice area. Everyone’s experience path can be different. This program acknowledges that the current architect supervisor or mentor is aware of the applicant’s competence in their current role; and that they are confident the applicant is competent to practice architecture independently. The documentation of past experience demonstrating competence at the task level is to inform the supervisor or mentor of the applicant’s experience to support their competency in the defined areas of the IDP. The work products listed to support each task are descriptive of appropriate work samples the applicant may wish to provide in support of their demonstration of competency. The descriptive work products also provide the supervisor or mentor with a definition of what they should expect to see in their review of the applicant’s experience.

**CERTIFICATION/AFFIRMATION OF COMPETENCY**

The applicant must have a current architect (licensed) supervisor or mentor (licensed to practice architecture and NCARB certified) who will certify/affirm that the applicant's work experience meets the current requirements of the IDP.

*Rationale:*

The aspiring architect's supervisor has historically held the responsibility for certifying that the experience of the applicant has demonstrated competence to practice architecture. The recollection of hours of experience completed, or level of competency, from work performed over 5 years ago is not probable or realistic. Therefore, this program proposes that the applicant must have a current architect supervisor or a current architect mentor to certify his or her past experience demonstrates the comprehension of the knowledge/skills necessary to perform the tasks required by the IDP.

Historically, the IDP has required an intern's work experience to be certified by an architect supervisor exercising *direct supervision*:

*"Direct supervision" of interns shall occur either through personal contact or through a mix of personal and remote communication (e.g. e-mail, online markups, webinars, internet) such that the IDP supervisor has control over the work of the intern and has sufficient professional knowledge of the supervised work so that the IDP supervisor can determine that the intern understands and is performing his or her work experience within the professional standard of care. To earn experience hours in workplace settings described in this document, the intern must work under the direct supervision of an IDP supervisor. The supervisor shall verify the experience of the intern and foster a professional relationship that is grounded in a direct professional association between the intern and the supervisor.*

Currently, the IDP requirements also recognize a mentors' critical oversight of an interns work in specific areas:

*"A mentor is defined as a loyal advisor, teacher, or coach. In IDP, there are opportunities for your mentor to certify certain supplemental experience opportunities and provide guidance in your professional development. To serve as your mentor for the IDP, the individual must hold a current license to practice architecture in a U.S. or Canadian jurisdiction; however, your mentor does not have to be registered in the jurisdiction where you are located."*

The success of this program relies on the allowance for broader verification of work experience, through certification of the work by the current architect supervisor or mentor. Restricting certification of experience to only those that have a qualified direct supervisor of existing experience will limit many applicants that may have many hours of experience but no access to previous supervisors for its verification.

#### *PROCESS*

The documentation and exchange of information will be a paperless, completely electronic exchange of information between the applicant and their supervisor or mentor. This electronic exchange will be facilitated through NCARB's information systems and supported by Customer Relations. Candidates for this program will be required to:

- Submit documentation to a current architect supervisor or mentor who is NCARB certified.
- Architect supervisor or mentor will review the work and attest to satisfaction of the experience requirement per our guidelines.
- NCARB will develop descriptions and a format for supervisor/mentor to follow.
- NCARB will perform random audits of electronic portfolios.
- Audit reviews to be performed by IC or EDU committee members and/or staff architects.

#### *Rationale:*

The applicant will be able complete all required information and upload all project documentation for review. This system will allow for collaboration on additional or corrective work samples needed to document competence in any content area, and obtain final certification/affirmation by their supervisor. NCARB will maintain all reported experience in the applicant's NCARB Record.

**State of Wisconsin  
Department of Safety & Professional Services**

**AGENDA REQUEST FORM**

<b>1) Name and Title of Person Submitting the Request:</b>  <b>Brittany Lewin Executive Director</b>		<b>2) Date When Request Submitted:</b>  Items will be considered late if submitted after 12:00 p.m. and less than: ■ 8 work days before the meeting	
<b>3) Name of Board, Committee, Council, Sections:</b>  <b>Architect Section</b>			
<b>4) Meeting Date:</b>  <b>9/22/15</b>	<b>5) Attachments:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<b>6) How should the item be titled on the agenda page?</b>  <b>Intern Development Program Experience Documentation Method Comments</b>	
<b>7) Place Item in:</b> <input type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both	<b>8) Is an appearance before the Board being scheduled? If yes, who is appearing?</b>  <input type="checkbox"/> Yes by _____ (name)  <input type="checkbox"/> No	<b>9) Name of Case Advisor(s), if required:</b>	
<b>10) Describe the issue and action that should be addressed:</b>  NCARB is requesting comments by September 29, 2015 regarding IDP program experience documentation. Please see attached information. The Section will discuss and decide how the Section would like to respond on September 22 during the teleconference.  Any questions prior to the meeting regarding the proposal or history should be directed to Brittany Lewin.			
<b>11) Signature of person making this request</b>		<b>Authorization</b>	<b>Date</b>
<b>Supervisor (if required)</b>		<b>Authorization</b>	<b>Date</b>
<b>Bureau Director signature (indicates approval to add post agenda deadline item to agenda)</b>		<b>Authorization</b>	<b>Date</b>
<b>Directions for including supporting documents:</b> 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Board Services Bureau Director. 3. If necessary, Provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting.			