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#### **Welcome to the FY22 NCARB Annual Report**

Fiscal Year 2022 has been a year of rapid change for NCARB, driven by continued collaboration and thought leadership within and outside the architecture industry. We have ensured that our operations align with industry best practices, adapted to the changes necessitated by the ongoing pandemic, and explored new ways to remain innovative and responsive. While many organizational initiatives have come to fruition over the past year, there are others that are just beginning. Our commitment to going further for our members, customers, and the public is detailed in this report, which highlights progress made in each of the six objectives identified in NCARB's Strategic Plan.

Thanks to the commitment of the entire NCARB community, we were able to improve and add to many of our core services—including launching new free practice exams for the Architect Registration Examination® (ARE®). We also migrated to a new test delivery partner, introduced testing accommodations for candidates who speak or read English as a Second Language, and updated several key documents used by our member licensing boards. This fiscal year, we also released the 11th edition of our annual data report, NCARB by the Numbers—offering new and exclusive insights on the path to licensure. We conducted our





once-in-a-decade Analysis of Practice study, exploring the current practice of architecture by reaching out to thousands of architects, designers, educators, and emerging professionals to better understand how they work, collaborate, and protect the public. Additionally, our staff continued critical outreach to students, licensure candidates, and architects, raising awareness regarding NCARB's mission and improvements to our core programs. Our growing partnerships and enhanced data capabilities are allowing us to evaluate the impact that NCARB's programs have on diversity, equity, and inclusion both in the profession as a whole and within our own communities.

Our role in the arena of advocacy is constantly evolving as we continue to promote reasonable regulation and collaborate with advocacy partners on issues central to the practice of architecture. We are committed to ensuring our key stakeholders can educate and inform legislators about the value of reasonable regulation. As an organization, we continue to explore the future of the profession and identify ways to take full advantage of evolving opportunities to go further in our mission.

In this report, you'll find:

- A timeline of our key efforts from July 2021 to June 2022.
- An update on our services and initiatives based on our Strategic Plan's six measurable objectives: Program
  and Service Excellence; Awareness in the Architecture Community; Stakeholder Systems, Tools, and
  Resources; Data Analysis and Thought Leadership; Advocacy Support, Outreach, and Influence; and FutureFocused Research and Development.

- Volunteer reports featuring highlights from our Board of Directors and committees.
- An overview of NCARB's organizational structure, business updates, the current *NCARB Bylaws*, and financial statements.

The FY22 NCARB Annual Report offers insight into our work throughout the past year as we continued our mission to collaborate with the 55 U.S. licensing boards to serve the public through the regulation of architecture. On behalf of the Council, it is our pleasure to welcome you to the FY22 NCARB Annual Report.

Alfred Vidaurri, NCARB, NOMA, FAIA

FY22 President/Chair of the Board

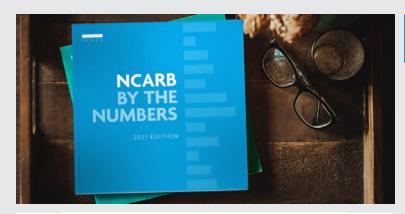
Michael J. Armstrong

NCARB CEO

facilitates the licensure and credentialing of architects to protect the health, safety, and welfare of the public.

# FY22 TIMELINE

Each year, NCARB takes on both new and recurring initiatives to serve its members, architects, licensure candidates, and the public. Explore key updates in this timeline of the organization's work throughout FY22—from a continued focus on diversity, equity, and inclusion (DEI) to the migration to PSI, it's been a momentous year for NCARB!





# **JULY**

#### **■ 2021 NCARB by the Numbers**

NCARB launched the 2021 edition of *NCARB by the Numbers*, which featured a month-by-month look back at COVID-19's impact on licensing and mobility, as well as new data on national licensing exam pass rates for different demographic groups.

#### Dunwoody College of Technology and Texas A&M Joined IPAL

Dunwoody College of Technology's Bachelor of Architecture program and Texas A&M University's Master of Architecture program were recently accepted to join the Integrated Path to Architectural Licensure (IPAL) initiative, which offers students the opportunity to earn an architecture license upon graduation.

"While the architecture profession continues to grapple with the changes brought on by the pandemic, NCARB's data shows that many key indicators of the overall health of the licensure pipeline are either numerically on the mend or showing growth in areas of diversity."

-NCARB CEO Michael Armstrong





## **AUGUST**

#### 2021 Licensing Advisors Summit

In August, NCARB hosted the 2021 Licensing Advisors Summit, providing advisors with training on NCARB programs and initiatives, navigating state and international options for licensure, and more.

#### ■ NCARB Scholars in Professional Practice

The third annual NCARB Scholars event—which successfully switched to a hybrid format the week before the program—welcomed 13 professors in person at Cal Poly in San Luis Obispo, California, and four virtually to facilitate learning and development around professional practice education.

## **SEPTEMBER**

#### **Supporting Local Architecture Students**

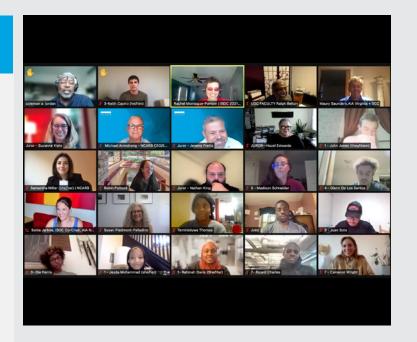
In September, NCARB sponsored the 2021 Interschool Design Competition, which brought together architecture students from six local programs in the District of Columbia, Maryland, and Virginia. NCARB has sponsored this initiative since 2017, and participating students receive a complimentary NCARB Record for one year.

#### **NCARB DEI & Governance**

The Board's DEI and governance consultants compiled and delivered data from listening sessions with NCARB's Member Board Members and Board of Directors, exploring DEI in NCARB's volunteer and leadership communities.

#### **Baseline on Belonging: Examination Report Release**

NCARB and the National Organization of Minority Architects (NOMA) released their second report focused on the Architect Registration Examination® (ARE®). This in-depth report explores factors that impact equity, diversity, and inclusion for candidates taking the ARE.







# **OCTOBER**

#### ◀ Preparing for PSI

NCARB staff created a "testing lab" in the office to conduct user acceptance testing for the transition to PSI.

#### Opposing Unpaid Internships

NCARB released a statement reaffirming its position on unpaid internships, which can deepen existing barriers for underrepresented groups in the profession.

"The majority of architects begin gaining professional experience while in college, so educating students about their rights is paramount. Ensuring architecture students and graduates have access to paid, quality internships is one way the profession can begin to address inequity."

-NCARB CEO Michael Armstrong

# **NOVEMBER**

#### Supporting Multilingual Candidates

In November, NCARB published French and Spanish versions of a joint collateral booklet that provides helpful resources and tips for the next generation of architects. This is part of NCARB's ongoing effort to reach a wider audience of multilingual candidates.

# LA GUÍA PARA LA CARRERA DE

LA CARRERA DE ARQUITECTURA<mark>.</mark>

Un recurso para la próxima generación de arquitectos.

# **DECEMBER**

#### 2021 Committee Summit

Members of NCARB's committees met both in person and virtually to discuss important issues, collaborate on shared charges, and explore the big-picture view of NCARB's ongoing work.

#### Joint NCARB/CIDQ Report

NCARB and its counterpart in the interior design profession released a joint report exploring similarities and differences between the essential knowledge, skills, and tasks required for competency in each profession.





# **JANUARY**

#### Annual FARB Forum

NCARB's presence at the annual Federation of Associations of Regulatory Boards (FARB) Forum provided an opportunity for insight and reflection into its role in the regulatory community.

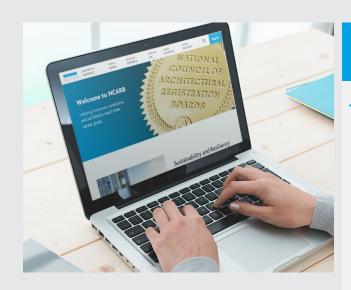
#### **Investing in Staff Wellness**

NCARB's Organizational Health team began a series of wellness seminars for NCARB staff, addressing topics like mental health, grief, and loss.

## **FEBRUARY**

#### **PSI Pilot Testing**

NCARB staff recruited and selected over 300 licensure candidates to pilot test the national licensing exam with PSI.



# **MARCH**

#### ■ New NCARB Website

NCARB launched an updated website in March, featuring a redesigned home page, improved navigation tools, and greater accessibility across the site.

#### **Regional Summit**

NCARB's Member Board Executives (MBE) Workshop and Regional Summit were held in Charlotte, North Carolina, in early March.

#### **Record Number of Reciprocal Licensure Applications**

Demand for out-of-state licensure was high throughout the year—with over 12,000 applications in 2021—and the Customer Relations team processed over 1,500 reciprocal licensure applications in March 2022.

# **APRIL**

#### **Analysis of Practice** ▶

In April, NCARB launched the final phase of its once-in-a-decade Analysis of Practice study—an industry-wide validation survey taken by over 14,000 architects, licensure candidates, and related professionals. The survey included 12 sections, with questions on topics ranging from ethics to specializations.

#### Baseline on Belonging: Education Report Release

NCARB and NOMA released the Baseline on *Belonging: Education Report*, exploring survey data regarding experiences while studying architecture—including impediments related to cost, program culture, and curriculum.

#### **International Engagement**

NCARB's leaders met with their counterparts from Canada and Mexico to discuss the ongoing evolution of the Tri-National Mutual Recognition Agreement.



# MAY

#### **Cross-organization Collaboration** >

From hosting a meeting of the leadership teams from the architectural alliance to holding the first NCARB International Regulatory Roundtable, NCARB leadership strengthened its connections and facilitated shared learning in the field of architecture.



"As we look toward the future of NCARB, we are faced with several critical opportunities to enact valuable and meaningful change. I am eager to see NCARB embrace its role in the profession as a voice for diversity, evolution, and forward-thinking development."

-FY22 NCARB President Alfred Vidaurri Jr., NCARB, NOMA, FAIA





## JUNE

#### **◄ Conducted Hybrid Annual Business Meeting**

Over 300 individuals attended NCARB's 2022 Annual Business Meeting, with attendees both in-person in Austin, Texas, and virtually.

#### **Unveiling a New Vision Statement**

NCARB's Board of Directors released a new Vision Statement, "Ensuring safe spaces and places for all communities," at the Annual Business Meeting.

#### **Establishing a Standing DEI Committee**

NCARB's members voted to turn the Diversity Collaborative into a permanent DEI committee along with several other resolutions.

#### ◀ Migration to PSI

NCARB migrated the delivery of the exam from Prometric to PSI, simultaneously launching new resources for candidates—including enhanced score reports for failing divisions and free practice exams for each division.

#### **New Accommodations for ESL Testers**

In June, NCARB began offering testing accommodations for ARE candidates who speak or read English as a second language (ESL) to ensure the exam is accessible for individuals of all backgrounds.

# YEAR IN REVIEW

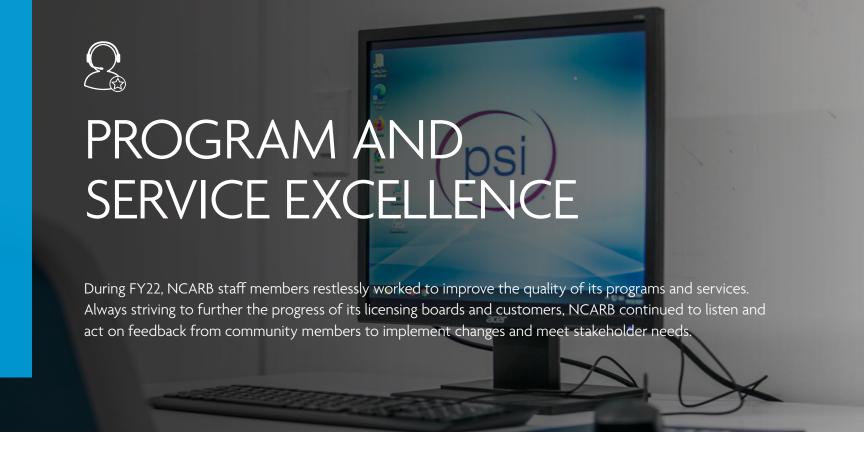
In FY22, the NCARB Board of Directors shared a new Vision Statement for the organization. Designed to encapsulate the objectives of NCARB's Mission Statement, Strategic Plan, and Statement on Diversity, the Vision Statement will help frame NCARB's work in the years ahead.

Throughout the year, NCARB's Board of Directors and senior staff leadership worked to establish parameters that would guide the implementation of the Strategic Plan and measure its success. The plan features three strategic goals: to facilitate licensure, foster collaboration, and maximize value. To achieve these goals, NCARB established six strategic objectives, which are presented within an "enhance, grow, transform" framework that identifies the kind of opportunities available for NCARB.

The FY22 NCARB Annual Report is structured around these six strategic objectives, to better reflect the progress that NCARB is making toward accomplishing its mission and goals in service of its members and the public:

- Program and Service Excellence
- Awareness in the Architecture Community
- Stakeholder Systems, Tools, and Resources
- Data Analysis and Thought Leadership
- Advocacy Support, Outreach, and Influence
- Future-Focused Research and Development

Learn more about NCARB's initiatives for its members, volunteers, licensure candidates, and architects throughout FY22—and understand how those initiatives fit into the bigger picture of NCARB's Strategic Plan.



By migrating the delivery of the Architect Registration Examination® (ARE®) from Prometric to PSI, NCARB provided candidates with immediate benefits, such as more flexibility in rescheduling and canceling exam appointments, dedicated PSI customer service, and more.

NCARB worked to expand its international engagement and provide greater opportunities for licensed architects around the world. By passing a resolution to ratify a new mutual recognition agreement (MRA) with NCARB's United Kingdom counterpart, the Architects Registration Board (ARB), NCARB's members are creating a more straightforward process for eligible architects to get licensed/registered in each country.

Additionally, NCARB worked to make improvements to several other programs and services. These included implementing an expedited process for transmitting NCARB Records and enhancing continuing education offerings.

#### **COVID-19 SERVICE UPDATES**

As the COVID-19 pandemic continued to evolve throughout the year, NCARB remained committed to its customers. While venturing into a new hybrid work environment, NCARB employees ensured the delivery of all programs and services—including Record transmittals, experience reporting, and the exam—were as seamless as possible.

Throughout the year, NCARB's Examination team collaborated with Prometric—and later with PSI—to share evolving COVID-19 safety policies and ensure both in-person and online ARE appointments were available to candidates.



CARB staff and volunteers collaborate safely at the 2021 Committee Summit.

To ensure everyone's safety and comfort, NCARB also conducted several important meetings, such as the 2022 Annual Business Meeting, with options for both in-person and virtual attendees. With this hybrid approach, NCARB believes it can have a more sustainable focus on collaboration through a blend of remote and face-to-face engagement. NCARB employees continue to monitor both the Centers for Disease Control and Prevention (CDC), local governments, and other professional sources for guidance on best practices for in-person events and engagements.

#### **MIGRATING TO PSI**

After decades of delivering the ARE with Prometric, NCARB made the decision to seek out a better customer experience with a new vendor. In summer 2020, NCARB selected PSI as its new partner for administering online and in-person exams, setting the stage for a new era of continued customer service improvements. While the content of the exam has not changed, as of June 14, 2022, candidates began taking test center and online proctored exams with PSI.



Throughout the process of establishing service with PSI and preparing for the migration, NCARB has focused on creating a better experience for candidates. With PSI's more focused service and ability to create custom solutions to fit organization needs, NCARB has more room to be responsive to ARE candidates and restlessly pursue ongoing improvements to the exam's delivery. The direct benefits for candidates of the migration to PSI include:

- Increased flexibility in scheduling and rescheduling: Candidates can now schedule and reschedule exams up to 48 hours in advance of in-person/test center appointments and up to 24 hours in advance of online proctored appointments.
- **Free rescheduling:** In 2020, NCARB made the decision to eliminate its portion of the rescheduling fee. Since PSI doesn't charge a rescheduling fee, candidates will now be able to reschedule exam appointments free of charge.
- **Exam cancellations:** Candidates now have the option to cancel exam appointments without forfeiting the entire cost of the appointment.
- **More test centers:** PSI uses a large network of third-party test centers. Through this network, PSI is able to offer more in-person test center locations that meet NCARB's security and technology standards compared to Prometric's available test centers.
- **Dedicated customer service and proctors:** PSI offers a dedicated customer service team for ARE candidates, as well as dedicated online proctors—ensuring that candidates will be able to connect with PSI staff who are familiar with NCARB's policies and procedures.

With the migration to PSI, NCARB also launched a suite of free practice exams—one for each ARE division. To learn more, see the <u>Stakeholder Systems</u>, <u>Tools</u>, <u>and Resources</u> section of this report.

#### **IPAL UPDATES**

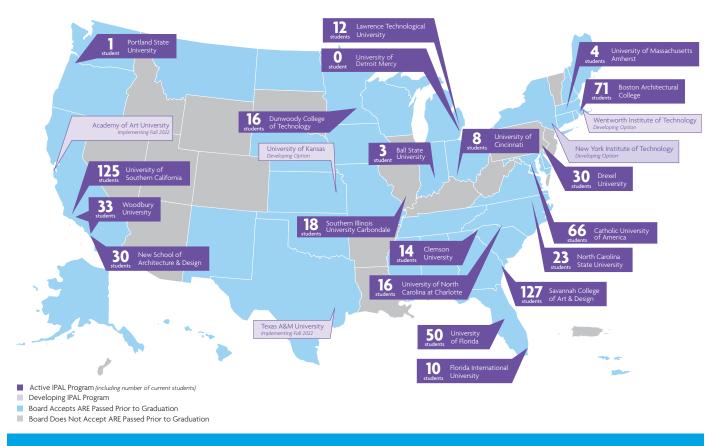
NCARB's Integrated Path to Architectural Licensure (IPAL) offers architecture students the opportunity to complete the Architectural Experience Program® (AXP®) and take the ARE while earning an architecture degree from an accredited program. By overlapping these requirements, dedicated students can become eligible for licensure upon (or shortly after) graduation. IPAL is offered as an option within existing programs accredited by the National Architectural Accrediting Board (NAAB).



In FY22, NCARB welcomed two new schools into the IPAL initiative:

- Dunwoody College of Technology's Bachelor of Architecture Program
- Texas A&M University's Master of Architecture Program

By the end of FY22, IPAL was offered at 24 schools—including 28 individual programs—across the United States, with over 600 students enrolled during the 2021-22 school year.

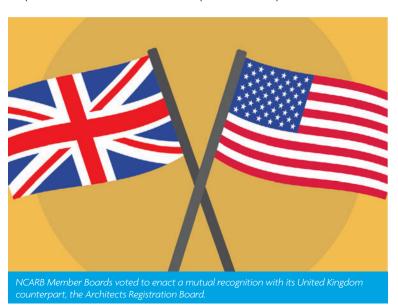


A map of the participating IPAL programs in the United State:

#### MUTUAL RECOGNITION AGREEMENT WITH THE UNITED KINGDOM

In June 2022 at the Annual Business Meeting, NCARB Member Boards passed a resolution ratifying a new mutual recognition agreement between NCARB and its counterpart in the United Kingdom, the Architects Registration Board. This agreement will enable eligible architects to benefit from a more straightforward process to get licensed/registered, helping them to establish professional contacts, seek work, and perform services as a registered architect in each country.

The agreement is the result of nearly four years of research and negotiation between NCARB and the ARB. Currently, it requires U.S. architects to be certified through the standard path to NCARB certification—holding a degree from an accredited architecture program, completing NCARB's experience program, and passing NCARB's national licensing examination. However, the agreement includes a stipulation that NCARB and the ARB must review the requirements for reciprocity within three years of the agreement's implementation to consider potential updates. Similar requirements will apply to U.K. architects, who are required to have secured ARB-prescribed qualifications issued in the U.K.



Further U.K. legislation—expected to be in place by early 2023—is needed before the ARB is able to review, approve, and sign the agreement. Once approved and signed by the ARB and NCARB, the MRA will go into effect 60 days after it has been signed by both parties. At that time, eligible architects will be able to pursue reciprocal licensure between the United States and the United Kingdom following the terms of the agreement. Because the United States does not offer a national license, each of the 55 U.S. licensing boards can determine whether or not they will accept the MRA as a path to reciprocal licensure within their jurisdiction.

This agreement is part of NCARB's efforts to continue expanding its international engagement and provide meaningful opportunities for licensed architects worldwide. NCARB will continue to explore potential mutual recognition agreements/arrangements with other countries while maintaining rigorous licensure standards that protect the public's health, safety, and welfare.

#### **EXPEDITING LICENSURE APPLICATIONS**

During FY22, NCARB's Customer Relations team continued to go further for licensure candidates and architects, with a focus on speeding up the timeline for transmitting licensure applications.

Following a successful pilot program in FY21, NCARB implemented an expedited transmittal process for NCARB Record holders who followed a straightforward path to licensure—earning a degree from a program accredited by the NAAB, completing the AXP, and passing the ARE. Instead of waiting up to 45 business days to have their Record evaluated and shared with a licensing board, these individuals can now expect NCARB to process their transmittal in less than 72 hours. This expedited process also frees up Customer Relations' bandwidth to process more complicated transmittals, such as those involving foreign education or licensure credentials.

This is part of NCARB's multi-year effort to reduce licensure application timelines for all Record holders: in the coming fiscal year, NCARB will expand the expedited transmittal process to include a broader range of candidates and work toward fully automating some transmittals in the future.

The Customer Relations team also implemented a new online customer satisfaction survey software, Nicereply, to understand and address customer concerns. With the automated tool, team members can access a real-time dashboard with personal and team metrics on service quality—allowing NCARB to be more responsive to customers' needs and swiftly anticipate any potential issues.

#### **CONTINUUM EDUCATION UPDATE**

NCARB's Continuum Education (CE) courses are still in high demand post-pandemic, with a new course that qualifies for health, safety, and welfare credit added each month to NCARB's extensive library. Throughout the year, NCARB also worked with AEC Daily—an e-learning platform for architects, engineers, and other construction professionals—to cross-promote the CE courses and ensure as many architects as possible have access to the affordable, high-quality course content.



NCARB continues to offer all CE courses to Certificate holders and active licensure candidates for free, with options to purchase available to all other customers. Additionally, the AXP Supervisor Training and AXP Portfolio Supervisor Training courses are available for free to all supervisors, regardless of certification.



The organization also strengthened its partnerships with external organizations, including those within the architecture community and similar organizations from other licensed professions. With proactive communications to the press and social media, NCARB continued to offer transparency into its operations, respond to customer feedback, and position itself as a thought leader in architectural regulation.

#### **OUTREACH TO MEMBERS AND VOLUNTEERS**

Regular communication between Member Boards and the Council helps both groups better accomplish their mission, collaborate, and serve the public. By circulating information on local issues and communicating NCARB program changes and jurisdictional requirement updates, NCARB was able to explore new ways to support architectural licensing boards as they carry out their essential work.

NCARB staff members also worked to raise awareness of the organization's role and ongoing work through volunteer and community engagement. These efforts bring together individuals who play a role in NCARB's initiatives, offering them a big-picture view of NCARB's progress throughout FY22.

#### **Licensing Advisors Summit**

In August 2021, NCARB held its biennial training event for architect licensing advisors—the dedicated volunteers who guide individuals on the path to licensure and certification. Licensing advisors include students, professors, and architects from across the country who share information about the process of becoming an architect with their local community.



During the hybrid event, NCARB provided licensing advisors with the opportunity to learn more about recent program changes, share best practices, and get to know NCARB leadership. Through a mix of presentations, interactive panels, and breakout sessions, attendees explored topics related to motivating, empowering, and advocating for candidates, including creating a diverse pipeline for the profession, navigating state requirements, and more.



NCARB volunteers engage at 2021 Committee Summit

#### **Committee Summit**

Each year, NCARB's Committee Summit provides volunteers with the opportunity to engage with members of other NCARB committees, task forces, and more. Each NCARB volunteer group focuses on a different aspect of the organization's work—from candidate-focused programs like the Architect Registration Examination® (ARE®) to internal items like NCARB's policy and governance documents. The annual Committee Summit is designed to give volunteers the opportunity to see how their work aligns with the rest of NCARB's efforts, providing a holistic understanding of each program or project.

With attendees participating both virtually and face-to-face in Washington, DC, this year's meeting allowed committee members to discuss shared topics of interest, collaborate on joint charges, and engage with the wider NCARB community. During the early December meeting, committee members also received important updates from NCARB leaders about progress on key FY22 priorities.



Regional Leadership lead a group discussion during the Regional Summit.

Nine volunteer groups participated in the FY22 meeting, including:

- Diversity Collaborative Task Force
- Education Committee
- Examination Committee
- Experience Committee
- Futures Collaborative
- Licensure Advisory Forum
- Responsible Charge Task Force
- Re-Think Tank
- Think Tank



#### **Regional Summit**

NCARB's Regional Summit is the second-largest gathering of its members each year, designed by regional leadership to encourage engagement within and across NCARB's six regions. Conducted on March 3-5, 2022, with in-person and virtual attendance options, this year's meeting allowed members to participate in individual regional meetings, discuss potential resolutions to be voted on during the Annual Business Meeting, and dive into critical topics such as the value of licensure and how diversity in the profession varies across regions.

During the keynote presentation, attendees also heard from the co-founder of Designing in Color (DCo), Christopher Locke, on how licensing boards can help address aspects of the built environment that have disenfranchised minority communities.

#### **Annual Business Meeting**

On June 2-4, 2022, members from the 55 U.S. architecture licensing boards convened for NCARB's 2022 Annual Business Meeting in Austin, Texas. Conducted with both in-person and virtual attendance options, the meeting provided a forum for NCARB members to elect the incoming Board of Directors and shape the agenda for the Council's next fiscal year (which begins on July 1). Throughout the weekend, attendees also had the opportunity to engage in workshops covering a variety of important topics and receive updates on NCARB's work over the past year.

During the meeting, members passed several resolutions—including a vote to ratify the Council's Mutual Recognition Agreement with the United Kingdom, as well as a vote to establish a new standing DEI Committee. Members also retired several historical resolutions in conflict with current Council policies and updated policy documents, including the NCARB Certification Guidelines, NCARB Bylaws, and NCARB Model Law and Regulations.

FY22 President Alfred Vidaurri Jr., NCARB, NOMA, FAIA, offered a reflection on NCARB's challenges and accomplishments over the past year, including efforts to improve representation throughout the organization's volunteer and leadership community. In addition, Vidaurri revealed a new vision statement for the organization: **Ensuring safe spaces and places for all communities.** The vision statement will enhance the mission and objectives outlined in the Strategic Plan.



"When you look back at how we've grown and evolved, it's truly incredible. But there's still more to do. We can go further if we stay focused on inclusion—regarding both the licensure path and NCARB leadership opportunities."

— FY22 First Vice President/President-elect Bayliss Ward, NCARB, AIA

Additionally, incoming FY23 President Bayliss Ward, NCARB, AIA, shared his vision for the year ahead. During his term, Ward plans to refresh NCARB's outreach strategy, ensuring that the organization continues to go further to raise awareness of its mission and the path to licensure. Ward will also oversee the organization's efforts to act on findings from NCARB's ambitious study on the field of architecture, the Analysis of Practice. Additionally, Ward will continue NCARB's work regarding diversity, equity, and inclusion, with input from NCARB's new standing DEI Committee and a special work group developing recommendations for Board governance.

#### **Member Board Outreach**

NCARB staff typically conduct regular visits to individual licensing boards. As the COVID-19 pandemic continued to evolve, all visits were conducted virtually during FY22. CEO Michael Armstrong and NCARB's Council Relations team were able to engage with several boards, including Alaska, Georgia, Idaho, New York, North Dakota, Pennsylvania, Utah, Washington, and Wisconsin. These meetings provided NCARB with a forum to learn about any upcoming changes to the licensing boards' rules and requirements and assess ways NCARB can better support the individual needs of each board.



NCARB also provided a series of webinars for board members and board staff, providing in-depth information about ongoing initiatives—including the migration of the ARE from Prometric to PSI, advocacy and external engagement, and more. This series of webinars allowed NCARB and licensing board members to discuss opportunities for greater alignment and provided the opportunity for open dialogue between NCARB and its members.

#### **CUSTOMER OUTREACH**

NCARB regularly conducts outreach presentations to students, licensure candidates, architects, and related professionals. These engagements provide the opportunity to raise early awareness about the path to becoming an architect, inform the community about core program updates, and provide one-on-one support.

As the COIVD-19 pandemic evolved during the year, NCARB's experts team conducted outreach with options for remote and face-to-face participation, which enabled NCARB staff to safely reach a broad audience of customers.

In FY22, NCARB made 100 presentations to 3,703 people at:

- 50 Universities
- 21 Professional Organizations
- 4 Firms
- 13 Professional Conferences
- 3 K-12 Conferences
- 1 AIAS Conference



NCARB staff provided support for attendees at the A'22 Conference on Architecture

#### American Institute of Architects (AIA) Conference

Thousands of architects from across the country convened in Chicago in June 2022 for AIA's national architecture conference. NCARB staff experts attended the conference, answering questions about licensure, certification, continuing education, and other architecture-related topics. NCARB staff members were also available to provide updates on recent program changes, including the migration to PSI and our upcoming reciprocity agreement with the United Kingdom.

#### **NCARB Live Webinars**

To ensure licensure candidates, architects, and other architecture, engineering, and construction (AEC) professionals have access to the latest information about NCARB's programs and initiatives, NCARB staff members regularly host live webinars on a variety of topics. Focused on relevant topics like testing with PSI or hearing from FY22 President Alfred Vidaurri about the Analysis of Practice study, the webinars hosted in FY22 allowed NCARB community members the opportunity to learn from NCARB experts and ask questions on hot-button topics in the architecture profession.

NCARB

NCARB LIVE:

The Future of

Architecture

With Katherine Matthews, Dena Prastos,
Andy McIntyre, and Alfred Vidaurri

NCARB President Alfred Vidaurri, architect Dena Prastos, and NCARB Assistant Vice President of Data and Analytics Katherine Matthews share insights related to the

#### **COLLATERAL ENGAGEMENT AND EXTERNAL PARTNERSHIPS**

By collaborating with members of the architecture community and beyond, NCARB helped address issues that extend beyond its programs and services in FY22. From hosting a meeting of leaders from the architectural alliance\* (formerly known as the six collateral organizations) to holding the first NCARB International Regulatory Roundtable, NCARB leadership strengthened its connections and facilitated shared learning in the field of architecture.

Throughout the year, NCARB also engaged with various organizations in the interior design, landscape architecture, engineering, and surveying professions, collectively known as the Interorganizational Council on Regulation (ICOR). Together, NCARB and its fellow ICOR members provided joint support to their shared members and engaged on other issues facing the design professions.

\*The following organizations are members of the architectural alliance:

- The American Institute of Architects (AIA)
- The American Institute of Architecture Students (AIAS)
- The Association of Collegiate Schools of Architecture (ACSA)
- The National Architectural Accrediting Board (NAAB)
- The National Council of Architectural Registration Boards
- The National Organization of Minority Architects (NOMA)



President Vidaurri joined the leadership of the six architectural collaterals on the Presidents Panel during AIAS Forum.

#### AIA

NCARB continues to collaborate with the AIA, the professional society for architects, to support the practice of architecture. AIA and NCARB leaders continued to engage at their regular Leadership Summits and architectural alliance meetings. In addition, NCARB collaborated with local AIA chapters throughout FY22 in areas facing potential deregulation, helping inform legislators and other key stakeholders about the vital role licensing boards play in protecting the public's health, safety, and welfare.

#### **AIAS**

For several years, NCARB has provided financial and mentorship support to the AIAS Freedom by Design™ program. The organization continued that partnership in FY22, again providing mentorship opportunities with members of state licensing boards and grants to fund the community service initiative. Freedom by Design gives architecture students the opportunity to gain real-world experience that counts toward their AXP hours while improving accessibility for local community members. NCARB also collaborates with the student organization by presenting at the annual AIAS Grassroots Leadership Conference, attending AIAS Forum, and meeting with AIAS leaders on a regular basis. In addition, past NCARB President Kristine Harding, FAIA, NCARB, served her last term as NCARB's representative on the AIAS Board of Directors, providing regular reports on NCARB's programs and services to AIAS leadership.

#### ACSA

Throughout FY22, NCARB and ACSA furthered their partnership to better support professional practice educators. Together, the two organizations continued their work on ProPEL, a library of digital curriculum materials that pro-practice professors can use to supplement their own syllabi.

#### NAAB

In FY22, NCARB and the NAAB met quarterly to exchange updates, respond to questions, and address evolving programs. The two organizations had the opportunity to continue working together on the development of the 2022 edition of *NCARB by the Numbers*, which features data on student enrollment and graduation provided by the NAAB. In addition, many NCARB volunteers serve on NAAB visiting teams to help review and evaluate programs seeking NAAB accreditation or accreditation renewal.

#### **NOMA**

NCARB and NOMA continued working together to release reports from the joint *Baseline on Belonging* study, which explores impediments along the path to licensure. In FY22, NCARB and NOMA released in-depth reports on examination and education and began conducting a series of focus groups to dive deeper into the findings. For more information about *Baseline on Belonging*, see <u>Data Analysis and Thought Leadership</u>.

#### **Licensure Advisory Forum**

NCARB's Licensure Advisory Forum (LAF) is made up of representatives from various architecture and architecture-related organizations—including the six architecture alliance member organizations, the Association of Licensed Architects (ALA), the Council of Architectural Component Executives (CACE), the Society of American Registered Architects (SARA), and the Society for Design Administrators (SDA). The forum aims to provide feedback on the entire licensure process and identify ways these organizations can work together to address common issues. Through the LAF, stakeholders from across the profession can participate in comprehensive discussions regarding the development and maintenance of competency standards, encompassing education, experience, continuing education, and how they can inform the examination.

#### **International Code Council (ICC)**

NCARB was a returning sponsor of the ICC's Building Safety Month, which encourages ongoing collaboration between code officials and the professionals who work with them, including architects. The sponsor for week 2 of Building Safety Month, themed "Exploring Careers in Building Safety," NCARB shared informational content across social media channels to encourage individuals to consider a career as a licensed architect.



CEO Mike Armstrong, FY22 President Alfred Vidaurri, and FY23 President Bayliss Ward participated in a meeting of the Architectural Alliance.

# Council for Interior Design Qualification (CIDQ)

As frequent collaborators in the built environment, architects and interior designers sometimes encounter parallels in their professions' skills and expertise. This correlation can lead to confusion and uncertainty from the public surrounding practitioners' roles and responsibilities. To help address this and enable more effective collaboration and regulation, NCARB and its counterpart in the interior design profession (CIDQ) released a joint report in December 2021 exploring



Introduction to Joint NCARB and CIDQ Report





NCARB and CIDQ released a joint report on similarities and differences between the competencies to practice architecture and interior design.

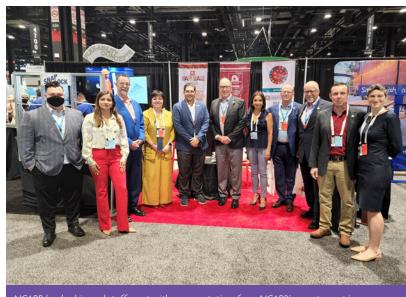
similarities and differences between the essential knowledge, skills, and tasks required for competency in each domain. This report can be used to inform the public about both professions and help licensing boards as they establish rules and requirements in their role to protect the public's health, safety, and welfare.

#### **Interorganizational Council on Regulation (ICOR)**

NCARB continued to partner with related organizations in the interior design, landscape architecture, engineering, and surveying professions, collectively known as the Interorganizational Council on Regulation (ICOR). In FY22, NCARB worked with other ICOR members to plan for the launch of a joint ICOR task force during the upcoming fiscal year that will explore ways to address incidental practice across their professions.

#### **International Outreach**

NCARB regularly partners with several international organizations to share information about its mission and explore and facilitate additional paths to reciprocity. In May 2022, NCARB hosted the first International Regulatory Roundtable—attended by representatives from nine countries and 13 different regulatory entities—which fostered collaboration and shared learning. NCARB staff members also hosted the 2022 Council for Tri-National Practice of Architecture with representatives from the Regulatory Organizations of Architecture in Canada (ROAC), Consejo Nacional de Registro de la Certificación



NCARB leadership and staff meet with representatives from NCARB's counterpart in Costa Rica at the A'22 Conference in Chicago.

Profesional de Arquitectos (CONARC), and Federación de Colegios de Arquitectos de la República Mexicana (FCARM). These opportunities—in addition to other outreach presentations and participation in meetings of related organizations—are examples of NCARB's continued commitment to strengthening and expanding its international network.

#### PRESS AND SOCIAL MEDIA HIGHLIGHTS

Throughout FY22, NCARB worked to reach customers and the architecture community in a variety of ways, including via email newsletters, the NCARB Blog, press, and social media. These platforms help ensure a broader range of readership for NCARB's updates, allowing information to spread beyond NCARB's own network.

#### Media Coverage

By engaging with architectural media, NCARB was able to reach beyond its typical sphere of influence. During the year, leadership participated in interviews and Q&A articles with various trade and business publications, including *Architect's Newspaper*, *Architectural Record*, *Forbes*, *The Hill*, *LA Business Journal*, *Retrofit*, and more.

#### Social Media Sentiment

NCARB monitors sentiment in conversations on social media to understand how customers feel about its programs and services, as well as how they perceive NCARB as an organization. Sentiment includes posts on Facebook, Twitter, and Instagram, as well as comments on blogs. NCARB determines sentiment by reviewing mentions of the organization, programs, and services. Each mention is ranked as neutral, positive, or negative, depending on the tone of the content. In FY22, NCARB had an overall sentiment of 66 percent neutral, 26 percent positive, and 7 percent negative. A high level of neutral sentiment is typical for a regulatory organization such as NCARB, as many related posts reflect individuals and outlets sharing programmatic and news updates. Many positive mentions of NCARB focused on helpful resources from the NCARB Blog, the NCARB Certificate, and the launch of free ARE practice exams in June 2022.



During FY22, NCARB developed several new tools for customers, including free practice exams for candidates taking the ARE. Plus, NCARB refreshed existing resources, including the ARE 5.0 Guidelines, exam score reports, and several key documents used by our member licensing boards.

#### **CUSTOMER TOOLS AND RESOURCES**

To make sure NCARB is meeting the needs of its customers, the organization regularly reviews and updates its resources and policies. This year, NCARB focused on accessibility, awareness, and alignment in its tools and communications.

#### **PSI Migration**

NCARB has migrated the delivery of ARE 5.0 from Prometric to PSI to better support licensure candidates. With PSI, candidates will experience several benefits, including more scheduling flexibility, more direct customer service, and less expensive rescheduling. Read more about the migration to PSI in the **Program** 

**Service and Excellence** section of this report.

#### **New ARE 5.0 Practice Exams**

As part of the migration to PSI, NCARB launched a suite of free practice exams. These new resources offer a full-length, fully scored practice version of each division of the ARE and are an important step toward increasing access to affordable, high-quality study materials.



During FY22, NCARB's item development volunteers finalized exam items for all six divisional practice exams.



"The availability of high-quality, free practice exams will help ensure equitable access to exam preparation materials, leading to a more equitable experience for diverse candidates."

— NCARB CEO Michael Armstrong.

Research from the *Baseline on Belonging* study, conducted jointly by NCARB and the National Organization of Minority Architects (NOMA), showed many exam candidates spend significant amounts of money on study materials, with limited insight into how well the prep materials prepare them for the exam. The study also showed that candidates of color were more likely to spend over \$500 on exam study resources and less likely to receive access to free study materials compared to their white peers.

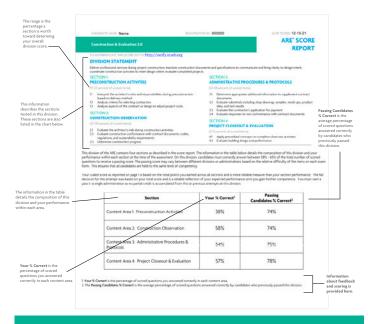
NCARB's new practice exams are designed to help lower the cost of preparing to take the ARE and ensure that all candidates have access to the resources they need to succeed.

The practice exams are available in two modes—test mode and practice mode—allowing candidates to choose a study experience designed to fits their needs.

- Test mode mimics the experience candidates have during a real exam appointment and provides a score report afterward.
- Practice mode provides the correct answer and rationale behind each item as candidates progress through the exam. Candidates will also receive a score report at the end.

#### **Enhanced ARE Score Reports**

NCARB also enhanced the information provided on failing ARE 5.0 score reports based on feedback from ARE candidates. The new score reports are designed to give clearer information on failed division performance, helping candidates better prepare to retake the division. Each divisional content area now features percentage-based performance information, comparing the percent of items candidates answer correctly to the average percent answered correctly by candidates who previously passed the division. Failing ARE divisions taken with PSI also include a scaled score, giving a consistent metric for interpreting scores across administrations.

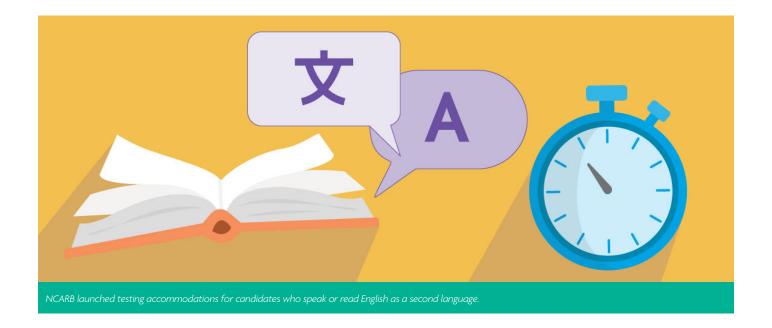


NCARB launched a new score report with more detailed feedback of failed divisions.

#### **New ARE 5.0 Guidelines**

With the migration to PSI, NCARB updated the

ARE 5.0 Guidelines to reflect new PSI processes and clarify information for candidates. NCARB also merged content from the ARE 5.0 Handbook into the Guidelines, so everything needed to prepare candidates for the exam is all in one place—including important policies as well as information about what candidates will be tested on.



#### **New ESL Accommodations**

Throughout the past year, NCARB evaluated the need to address testing equity for candidates who are English as a second language (ESL) readers. Using ARE performance data comparing non-ESL candidates to ESL candidates, NCARB's independent psychometrician consultants determined that a significant difference in performance existed.

After reviewing data and psychometrically acceptable options, the Examination Committee recommended and the NCARB Board approved creating two testing accommodations for ESL candidates:

- Additional testing time: 20% of the original testing time for each division added as an extension to the original testing time.
- Word-to-word translation dictionary: For candidates testing at a PSI test center, use of a personally supplied, printed word-to-word translation dictionary of the candidate's choosing that has no additional notes or markings added to the text.

NCARB already offers accommodations for disabilities and temporary medical conditions, guided by the Americans with Disabilities Act (ADA). The new ESL accommodations join the organization's existing accommodations process to ensure that the national licensing exam—which is required by all 55 U.S. jurisdictions—is accessible for all candidates. These accommodations represent an important step toward encouraging greater diversity, equity, and inclusion (DEI) along the path to architectural licensure.

#### **WEBSITE ACCESSIBILITY**

Throughout FY22, NCARB staff worked with external consultants to ensure that its websites—including both www.ncarb.org and My NCARB—are accessible for individuals with physical or situational disabilities.

In March 2022, NCARB launched an updated website, featuring a redesigned home page and navigation to help users swiftly find the resources they need. Updates to the website include:

- Relevant updates in one place: NCARB's new homepage highlights key resources, recent news, and program updates
- All the education info candidates need:
   Find all things education-related in NCARB's new "Earn a Degree" section of the website
- Accessibility: NCARB's website is now easier to read for all users, including those using screen-reading software
- Uncluttered design: NCARB created a new Data & Resources hub, so users can easily find the resource they're looking for



• Focus on the licensure journey: Direct links to jurisdiction requirements on the Licensing Requirements Tool (for example, www.ncarb.org/alaska) will take users directly to their state's requirements

Additionally, My NCARB was updated to ensure that it is fully accessible for all users.

#### **CERTIFICATION GUIDELINES OVERHAUL**

During the Annual Business Meeting, NCARB's members approved changes to its *Certification Guidelines*. The "Alternatives to the Education Requirement" section was amended to emphasize that NCARB determines which path is appropriate based on a candidate's educational background, clarify requirements for the Two Times AXP path, and clarify that applicants who choose to get an Education Evaluation Services for Architects (EESA) evaluation must meet any deficiencies identified within the EESA report. Clarification was also added in this section to alert candidates that they can only complete either the education or experience alternative, not both. Other changes include an update to align the *NCARB Bylaws* and Professional Conduct Committee's *Rules and Procedures*.

#### **NCARB SCHOLARS**

On August 12-14, 2021, 15 professional practice professors from architecture programs across the United States gathered for the third NCARB Scholars in Professional Practice training event. With options for virtual and in-person participation, the training provided an opportunity for educators to enhance the delivery of professional practice courses for architecture students.

The training is designed to engage professional practice professors with the licensure process and ultimately enhance the way these classes prepare students for real-world practice.



NCARB Scholars participating at the Professional Practice training event.

During the three-day event, attendees got the chance to share best practices, receive training on curriculum development, and enhance the delivery of professional practice courses. Through a mix of presentations and interactive sessions, attendees discussed how to fully engage students in developing their professional growth and competency; explored communication, perception, and marketing skills; engaged in a mock arbitration session with the guidance of legal counsel; learned about leadership models; and more.

#### MEMBER AND VOLUNTEER RESOURCES

NCARB staff collaborate across departments to ensure that licensing board staff, members, and volunteers have access to the resources they need. During FY22, NCARB focused on refreshing several existing tools for these key stakeholders.

#### **Model Law and Regulations Update**

In FY22, NCARB updated its *Model Law and Regulations* to clarify language around the topic of "responsible charge" This effort is the culmination of two years of work by NCARB's Responsible Charge Task Force, which was created in FY21 by then-President Robert M. Calvani, FAIA, NCARB. The Responsible Charge Task Force recommended that the definition of responsible charge in NCARB's *Model Law and Regulations* be updated to reflect modern practice standards and that the term be changed from "responsible charge" to "responsible control."

The updated language expands the existing definition to bring regulation into alignment with



Chair of the Responsible Charge Task Force David L. Hoffman explained the recommended updated at the 2021 Committee Summit.

current practice, while removing ambiguity and clearly defining the critical components and expectations of architects in responsible control. NCARB's membership approved the updated language in June at the organization's Annual Business Meeting.

#### **NCARB Bylaws Updates**

This fiscal year, NCARB's members approved two updates to the *NCARB Bylaws*, which lays out the organization's governance. Changes to the document included:

- Creation of a Diversity, Equity, and Inclusion (DEI) Committee—This resolution turns the Diversity Collaborative into a standing advisory committee in the NCARB Bylaws to ensure the continuity of its important work. This update to the Bylaws further demonstrates the Council's ongoing commitment to diversity, equity, and inclusion, sending a clear signal that this work is a priority to the organization. It also allows the committee the opportunity to continue to evolve.
- Omnibus Updates—Additionally, NCARB reviewed and recommended general updates to the document, including adding the Northern Mariana Islands to Article VI, Section 2; making minor updates to Article VII, Section 5 for clarity and consistency for elections of like positions; and replacing gendered pronouns with gender-neutral alternatives.

#### **Sunset of Old Resolutions**

In FY22, NCARB's Policy Advisory Committee continued a multi-year research project to identify historical policy or position-related resolutions that may no longer align with current Council practice or philosophy. This year, the committee reviewed resolutions dating back to 1980 that were related to financial, process, education, experience, certification, or continuing education policies. The committee also conducted a holistic review of policy resolutions related to the exam.

Following review, the committee proposed the retirement of several resolutions to ensure that NCARB's official policies align with current practice. The resolutions were officially retired during NCARB's Annual Business Meeting in June following a membership vote. Additional resolutions to clean up NCARB policies are expected over the next several years as the Council works to develop a more user-friendly archive of past resolutions.

#### **Get on Board**

As part of NCARB's initiative to encourage diverse appointments to state licensing boards—which will lead to more diverse leadership at the national level—NCARB continued its "Get on Board" campaign to advertise open positions on licensing boards to its customer community. By raising awareness of opportunities to volunteer, NCARB hopes to promote increased engagement for individuals of all backgrounds. This campaign is expected to grow over the coming years.

#### **Regional Summit**

In March, members of the U.S. architectural licensing boards gathered in Charlotte, North Carolina, for the organization's annual Regional Summit. The summit provides a forum for NCARB's regions to explore topics related to architectural regulations. Attendees participated in breakout sessions, received an update on NCARB's DEI efforts, and previewed FY22 resolutions. Throughout the two-day event, members discussed regional business, heard from candidates running for NCARB office, and explored challenges facing licensing boards.



Y22 Public Director Gary Ey engages with other public members at the



# DATA ANALYSIS AND THOUGHT LEADERSHIP

As a source of exclusive data and insight into the path to architectural licensure, NCARB has positioned itself as a thought leader in the regulatory community, the architecture industry, and beyond. By using data analysis to support informed decision-making at the national, regional, and jurisdictional level, NCARB helps lead impactful change throughout the architecture community.

In FY22, NCARB added fresh insights to its *NCARB by the Numbers* publication, exploring the ongoing impact of the COVID-19 pandemic on the licensure pipeline and sharing expanded demographic information. And through their ongoing *Baseline on Belonging* study, NCARB and NOMA released two in-depth reports highlighting how factors like race, gender, and age can impact candidates' school experiences and time preparing for/taking the national licensing exam.

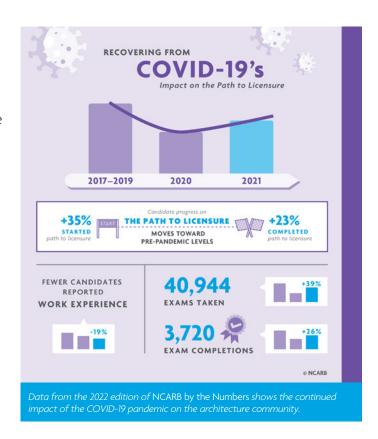
#### **NCARB BY THE NUMBERS**

In FY22, NCARB released the 11th edition of its annual data report, *NCARB by the Numbers*. Each year since its inception, NCARB has evolved the publication, offering new and exclusive insights as the organization expands its data capabilities.

#### **Impact of COVID-19**

Throughout 2021, NCARB carefully tracked candidates' progress through the AXP and ARE—as well as other key licensure metrics—to understand how the pandemic impacted their ability to meet career goals. This report offers a month-by-month review of those key metrics, compared against numbers seen during the initial year of the pandemic (2020) and averages from the previous three years (2017-2019).

While the pandemic's long-term impact on the next generation of architects is still unknown, a look



at 2022 data shows promising gains in several key areas—such as increased exam deliveries and reciprocal licensure applications. Key insights from the special report include:

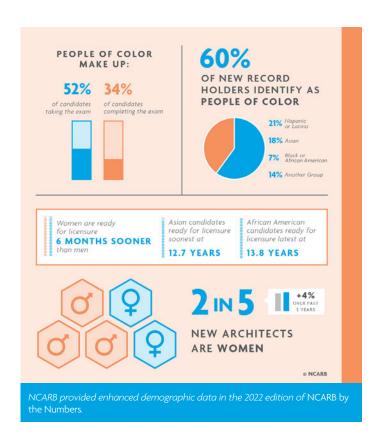
- Over 3,500 candidates completed the path to licensure in 2021, a rise toward pre-pandemic levels.
- Over 40,000 exams were delivered—still about 11,000 fewer (22%) than the average number delivered in the years leading up to the COVID-19 pandemic, but much closer to pre-pandemic numbers.
- Around 20,200 candidates submitted AXP reports in 2021—a 19% drop from 2020.
- Just over 7,500 candidates started a new NCARB Record in 2021—10% fewer than the average number seen in the three years prior to the pandemic.
- In 2021, transmittals for reciprocal licensure applications exceeded the average number seen in the years prior to the pandemic by 22%.

NCARB's data suggests that while the licensure pipeline is beginning to recover from the initial impact of the pandemic, some effects may continue to be felt for several years.

#### **Expanded Demographics Information**

The 2022 edition of *NCARB by the Numbers* provides enhanced demographic reporting, including more detailed information about diversity in the profession and the status of attrition for various demographic groups throughout the licensure process.

NCARB adjusted the way it presents data around racial and ethnic diversity to reflect the fact that individuals can identify as more than one race or ethnicity. The "Navigating the Path" section of NCARB by the Numbers includes charts that display candidate attrition from the licensure path filtered by race and ethnicity, gender, and age—as well as new charts highlighting where on the path to licensure individuals were when they stopped pursuing a license. Understanding how attrition varies across demographic groups will allow NCARB to discern areas where candidates may face impediments on the licensure path and work toward potential solutions.



#### **FAIRNESS IN LICENSURE**

In 2019, NCARB launched an internal work group and commissioned external consultants to study licensure programs through a DEI lens. Through this effort, NCARB has explored potential links between exam performance and the experience program

The Fairness in Licensure team continued this critical research in FY22, focusing on the impact of speaking English as a second language (ESL) on candidate performance (which led to the release of an accommodation for ESL candidates) and exam readability. Throughout the year, team members evaluated licensure path data to identify

instances of unequal burden on the path to licensure and how NCARB might create solutions to these issues.

NCARB looks forward to sharing more information about the team's ongoing work in the years ahead.

#### **BASELINE ON BELONGING**

Nearly 15% of architects in the United States identify as a racial or ethnic minority, according to *NCARB by the Numbers*. And while representation along most career stages has increased slowly over the past several years, candidates of color are still more likely than their white peers to stop pursuing licensure.

In early 2020, NCARB and NOMA launched the joint *Baseline on Belonging* study to better understand the factors that lead to this attrition. The study's initial survey was released in February 2020 to over 70,000 individuals and received over 5,000 complete responses (including over 2,800 from people of color and

nearly 2,500 from women). Findings from the study highlight areas where NCARB and NOMA—and others—can provide additional support, conduct deeper research, and propose measurable solutions to address disparities.

The two organizations first released an overview report in June 2020, sharing several key highlights from the study. In February 2021, they released the first in-depth report, exploring impediments minority professionals face while gaining professional architecture experience. In FY22, NCARB and NOMA released two more in-depth reports on the national licensing exam and architecture education.

In addition to in-depth reporting, the two organizations partnered with a consultant, the Clearing, to conduct in-person and virtual focus groups aimed at brainstorming actionable solutions.

#### Many candidates reported facing significant difficulties affording the ARE. 80% purchased study materials—and almost half spent \$500 or more 74% candidates who completed the ARE reported income as received no firm a factor impacting support toward the exam affordability **26%** Roughly of test-takers were confident in their 2 out 3 ability to afford candidates faced the exam difficulty paying

According to the Baseline on Belonging: Examination Report, many candidates reported difficulty affording the national licensing exam.

# Baseline on Belonging: Examination and Education Reports

In September 2021, NCARB and NOMA released the second full report in the organizations' joint study on diversity and attrition along the path to licensure: the *Baseline on Belonging: Examination Report*. The report reviews survey data regarding respondents' experiences preparing for and taking the examination, including impediments in the areas of financial support, coaching and mentoring, and overall cost. A subsection of the



"The disparity in architecture exam pass rates is hard to see, but facing that number head on empowers us to ask better questions, and create new programs and policies that help ensure a successful career in architecture is both accessible and achievable to those historically marginalized by the process."

—NOMA President and Gensler Senior Associate Jason Pugh, NOMA, AIA, AICP, LEED AP

findings, based on a multi-year collection of data by NCARB, indicates that people of color have significantly lower pass rates when taking the ARE compared to their white peers. Survey data from the full report highlights how factors like firm support and financial constraints may disproportionately impact candidates over 40 years old and people of color—especially women of color.

The third installment in the organizations' joint study on diversity and attrition along the path to licensure, the *Baseline on* 



"We know that people of color are more likely to stop pursuing a license. The findings from this survey help us identify why. ... Together, we can ensure that the future of our profession better reflects the communities we serve."

—FY22 NCARB President Alfred Vidaurri Jr., NCARB, NOMA, FAIA.

Belonging: Education Report explores survey data regarding experiences completing a post-secondary degree in architecture—including impediments related to cost, program culture, and curriculum. The data consistently indicates that Black or African American female respondents do not report receiving the same level of support or inclusion as reported by their peers. The report also highlights disparities in affordability and culture between graduates of National Architectural Accrediting Board (NAAB) accredited programs and graduates of non-accredited architecture programs.

NCARB and NOMA will release a final report on architecture firm culture and career development.

#### **Focus Groups**

Starting in spring 2022, NCARB and NOMA began partnering with a consultant to conduct further research via focus groups. With four virtual and four in-person sessions, each focus group was aimed at finding the "why" behind various barriers faced by underrepresented professionals and identifying potential solutions.

Working alongside the Clearing, NCARB and NOMA expect to use the focus groups' insights to create and implement an action plan with measurable solutions.

#### **NEW VISION STATEMENT**

At NCARB's June Annual Business Meeting, FY22 President Alfred Vidaurri shared a new Vision Statement for the organization. Designed to encapsulate the objectives of NCARB's Mission Statement, Strategic Plan, and Statement on Diversity, the Vision Statement will help frame NCARB's work in the years ahead:

#### Ensuring safe spaces and places for all communities.

Implemented by NCARB's Board of Directors, with input from NCARB's staff and volunteers, the Vision Statement provides a brief summary of the impact NCARB hopes to have on the architecture community and the public.

This statement, combined with NCARB's Statement on Diversity and Mission Statement, highlights the organization's commitment to encouraging greater diversity, equity, and inclusion in architecture. The statement is a part of NCARB's updated Strategic Plan, which is used to guide the organization's programs and initiatives.



The Board of Directors prioritizes advocating for the importance of licensure, reasonable regulation, and the authority of NCARB's Member Boards to protect the public. The Board equips the advocacy team with the tools and resources necessary to complete our tasks. The continued support and guidance from the Board are invaluable to NCARB's success.

NCARB continues to maintain its core advocacy and external engagement goals. Through the year, the organization tracked hundreds of bills and regulations and engaged in legislative and political challenges nationwide. With internal and external sources of support, the Advocacy team is poised for another year of success heading into FY23. Political and legislative challenges will inevitability arise, but the goal of being a thought leader in the regulatory community remains a focus.

#### **LEGISLATION TRACKING & MONITORING**

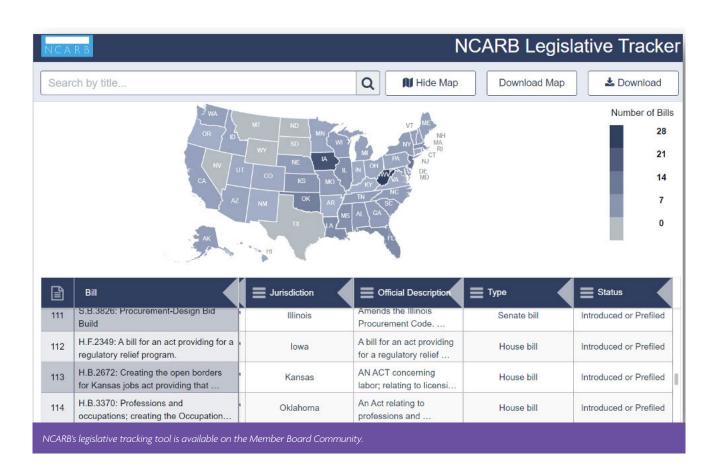
NCARB's Advocacy + External Engagement team prioritizes national tracking of potential legislation and regulations. The organization monitors bills and regulations that may impact architectural regulation or an architect licensing board's ability to carry out its mission. During FY22, NCARB:

- Reviewed more than 2.800 bills.
- Actively monitored approximately 250 bills throughout all 55 jurisdictions.
- Monitored top-trending legislative topics, including:
  - Reciprocity, especially for military members and their spouses
  - Board oversight of applicants' criminal histories
  - O Universal licensure
  - Board and administrative oversight
  - Regulatory reform

#### 2022 LEGISLATIVE MONITORING STATISTICSCCC

Issues	Monitored Bills
Military-Related	38
Criminal History	20
Administrative/Operational	17
Interior Design	15
Universal Licensure	14
Sunrise/Sunset	11
Fees/Revenue/Funds	10
Board Review/Oversight	6
Reciprocity	7
Advocacy Issues	8
Regulatory Review	4
Right to Earn a Living	3

Our easy-to-use legislative tracking tool on the Member Board Community allows users to explore issues not only in their specific jurisdictions but also across the country.



#### **Political and Legislative Engagement**

NCARB's Member Boards faced various legislative and political challenges in FY22. Below are examples of some of the unique challenges from this past year:

#### Louisiana

Lawmakers introduced Senate Bill 483, a "universal licensure" bill, to increase out-of-state licensees for all regulated professions. While their intentions were laudable, it would have confused applicants and created unintended consequences for the Louisiana State Board of Architectural Examiners' already streamlined processes for licensure. NCARB worked alongside the Board, AIA Louisiana, NCEES, and CLARB to educate policymakers. The Louisiana Board was able to obtain an exemption from the final bill language.

#### **West Virginia**

The West Virginia legislature passed House Bill 4634, a version of a universal licensure bill that includes several critical, qualifying provisions. Normally, universal licensure bills require a state licensing board to grant a reciprocal license to an applicant. Beginning in 2021 and continuing into 2022, NCARB worked alongside the board, ARPL, and others to regularly engage policymakers and reach a consensus on the bill's language. Together, these collaborators helped transform a poorly written bill into legislation that still maintains rigorous standards and already streamlined paths to licensure in West Virginia.

#### **Arizona**

The Supreme Court of Arizona has ruled in the case of *Greg Mills vs. the Arizona Board of Technical Registration*. The Arizona Board covers both the practice of architecture and engineering, among others. Mills had been working as an engineer for his decades-long career but had not been licensed with the Board, triggering disciplinary action. Although the investigation into Mills had not gotten to the point of a formal review, he sued the Board on the grounds that their rules violated his free speech and the Board's powers were an unconstitutional delegation of judicial power.

The Court ruled in favor of Mills on those grounds, but only to the extent that he was not able to force the Board to perform a formal review, which he then could have appealed. This decision does not diminish the Board's authority, as the Court dismissed Mills' claims of the Board's powers being unconstitutional.

NCARB has been working with the Board, legal counsel in Arizona, and other relevant organizations to support the Board's authority, including providing an Amicus Brief in collaboration with CLARB to support the Board. NCARB will continue to collaborate with the engineers and other parties involved in this case and continue to provide updates.

#### Mississippi

The Mississippi Secretary of State initiated a red tape reduction plan called "29 by 29," in which they will review all 29 of the state regulatory boards for unnecessary regulations by the year 2029. The Mississippi Board of Architecture is one of the first boards to be reviewed. NCARB joined with CLARB to send a letter directly to the Secretary of State to defend the licensing authority and regulations of the Board. NCARB offered support during their review and is awaiting further action from the secretary's office.

#### **Montana**

Governor Gianforte of Montana directed the Montana Department of Labor and Industry (DLI) to review the rules and statutes of all occupational boards that fall under the DLI's authority to reduce the administrative burden of unnecessary regulations. NCARB is working with the other Alliance for Responsible Professional Licensing (ARPL) organizations to monitor the potential rule changes and provide the DLI with information that will support the Boards. This includes a letter written in collaboration with CLARB to give the context of NCARB and CLARB's roles in the licensing process.

The Advocacy & External Engagement team is committed to supporting NCARB Member Boards maintain critical regulations that protect the public health, safety, and welfare. Our advocacy toolbox includes an array of available resources, including:

- Submitting testimony
- Creating presentations
- Coalition building
- Legal counsel support
- Policy analysis

#### **COALITION BUILDING**

NCARB also strengthened external partnerships to reach key audiences better. ARPL continued to be an integral part of the advocacy program. The organization utilized the Alliance's national reach to help promote a responsible, balanced approach to professional licensing. In addition to ARPL, NCARB has also partnered with the Interorganizational Council on Regulation (ICOR) and the Federation of Associations of Regulatory Boards (FARB) to tackle architectural regulation issues.

#### The Interorganizational Council on Regulation

ICOR comprises the four design-related regulatory associations representing architecture, landscape architecture, interior design, and engineering and surveying. Its members include: NCARB, the Council of Landscape Architecture Registration Boards (CLARB), the National Council of Examiners for Engineering and Surveying (NCEES), and the National Council for Interior Design Qualification (NCIDQ). NCARB partners with ICOR on a variety of issues—including meeting to discuss the regulation of the design industry and licensure trends. Collaborative efforts are also made on political and legislative challenges while continuously strengthening our relationships.

## The Alliance for Responsible Professional Licensing (ARPL)

ARPL promotes a responsible, balanced approach to professional licensing. NCARB, alongside other ARPL members, aims to educate policymakers and the public on the importance of protecting rigorous licensing for professionals



with high public impact. NCARB also provides best practices and practical solutions to help states solve occupation-specific licensing challenges. ARPL made significant strides in FY22 to continue educating stakeholders on the importance of reasonable regulations.

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ARPL focused much of FY22 more narrowly on public relations and earned media. These two strategies enabled the Alliance to reach key audiences more effectively, such as policymakers and the public. Media coverage is a pillar of ARPL's success, promoting awareness of the organization and the importance of rigorous licensure standards that protect the public.

While ARPL has a national focus, its members also organize state-specific efforts. The Alliance worked alongside state licensing boards and associations representing different professions to tackle specific legislative and political challenges. In some particularly challenging cases, the organization has convened groups of "mini-ARPLs." These mini-ARPLs include national organization members (architects, engineers, accountants, etc.), but focus on challenges in a specific state rather than across the country. This year NCARB convened mini-ARPLs in several states, including:

- West Virginia: ARPL helped the mini-ARPL group with anti-licensing efforts by publishing an op-ed, *Smart Licensing Will Protect Infrastructure*, which was signed by a West Virginia-based engineer and certified public accountant. After being distributed throughout the legislature, the anti-licensing efforts were defeated. This was the second year of successful ARPL measures in West Virginia.
- Louisiana: In response to anti-licensing legislation in Louisiana, ARPL commissioned a public opinion poll of Louisiana voters to gauge how they value occupational licensing—with results showing that there is a deep concern about anti-licensing proposals and "widespread support for maintaining rigorous professional licensing standards for professionals." Several proposed bills were concerning to ARPL, so the ARPL mini group continued to meet throughout the course of the legislative session to decide what actions to take.
- Montana: The Montana Department of Labor and Industry (DLI) sent out a survey earlier this year to
  professionals throughout various occupations, including architects and landscape architects. This survey
  was intended to find what professionals thought needed to be changed within the regulatory environment.
  In response, ARPL convened a mini-ARPL group to address the challenges that this survey and subsequent
  legislative proposals may bring.

## Federation of Associations of Regulatory Boards (FARB)

In addition to industry partners and ARPL, NCARB also collaborated with FARB, which is made up of regulatory associations like NCARB. Through FARB, NCARB shares best practices around regulation and provides resources and thought leadership to organizations facing similar opportunities and challenges. NCARB CEO Michael Armstrong currently serves as the Vice Chair of the FARB Executive Board.





In FY22, the ongoing work of NCARB's Futures Collaborative and the Analysis of Practice conducted research that will enable NCARB to anticipate—rather than respond to—the needs of the future.

#### **ANALYSIS OF PRACTICE**

The Analysis of Practice is a profession-wide study designed to explore the current and near-future practice of architecture. NCARB conducts an analysis of practice every 7-10 years to inform changes to the national programs required for architectural licensure, including the AXP and ARE. To better understand the work, scope, and skills required of architects—as well as those that overlap with other related professionals—the study featured a wide range of data collection methods, including focus groups; online polls; and a comprehensive, profession-wide survey released in April 2022.

In FY21, NCARB concluded phase one of research in partnership with consultants from Alpine Testing Solutions and Schlesinger Group. The second and third phases of the Analysis of Practice were put on hold during the pandemic to accommodate any dramatic shifts in architectural practice caused by changes in demand, remote work, or other related factors. During winter and spring 2021, NCARB and its research partners prepared to relaunch the Analysis of Practice in early FY22. Starting in August 2021, NCARB resumed active data collection through online interviews, webinars, and digital ethnographic research.

In April 2022, NCARB launched the final data gathering piece of the Analysis of Practice: an industry-wide validation survey taken by nearly 14,000 architects, licensure candidates, and related professionals. The survey included 12 sections, with topics ranging from ethics to specializations. To promote the study, NCARB launched mini-surveys weekly on different relevant topics, such as mentorship and adaptive reuse, and ran a targeted digital ad campaign.

#### Data highlights:

- Over 19,000 uniquely identified participants throughout the entire AoP
- Over 14,000 main survey respondents, with:
  - More than 6,000 full survey completions
  - O More than 105,000 individual section completions
- To promote engagement with the survey, NCARB:
  - Made over 783,000 ad impressions
  - O Mailed a postcard to over 48,000 Certificate holders
  - Sent 27 tailored group emails (Over 1,000,000 individual emails in total)
  - Partnered with 93% of our Member Boards to connect with licensees and candidates

This Analysis of Practice is the largest and most comprehensive study undertaken to-date, exploring everything from advances in technology to shifts in cross-professional collaboration and specialization.

While previous practice analyses have focused on consistencies that establish the role of a "typical" architect, this Analysis of Practice was designed to better understand the diversity of practice that exists within the profession. In collaboration with research partner Alpine Testing Solutions, NCARB gathered input from the entire profession, ensuring individuals of all demographics are well-represented—including racial, ethnic, and gender representation, as well as representation of practitioners from various firm sizes, regions, experience levels, and beyond.



FY22 President Alfred Vidaurri collaborated with NCARB volunteers at the 202i Committee Summit

#### In FY23, NCARB staff members and

volunteers will review the study's findings. As NCARB moves into the next phase of this ambitious project, results from the study will help staff members to better understand the current state of architectural practice and may lead to changes to the national licensing programs and standards of the future. Due to the complexity of this process, significant changes to the ARE and AXP may take several years.



"The Analysis of Practice study is the mechanism to ensure NCARB continues to align with the ever-evolving practice of architecture. It allows us, as practicing architects, to push 'dents out of the can from the inside' by providing valuable feedback on the issues of today."

—Celestia Carson, AIA, NCARB, LEED AP

#### **EXPLORING FUTURE PATHWAYS TO LICENSURE**

When Alfred Vidaurri Jr., NCARB, NOMA, FAIA, became NCARB's FY22 president, he challenged NCARB staff and volunteers to undertake a blue-sky exploration of how architectural licensing might evolve in the future. Charging the three main programmatic committees to explore education- experience- and examination-only paths to licensure, he encouraged NCARB to look at pathways that mirror the broad range of experiences that bring people to the profession and the different directions their careers can take.

Throughout FY22, volunteers contributed heavily to this research by beginning the fundamental work needed to create a licensing path that is relevant to today's practice and critically considering what is necessary to achieve competency. To dive deeper into this topic, each FY22 Board of Directors meeting featured conversations around how NCARB defines, measures, and test competency.

Exploration of future paths to licensure will continue with FY23 President Bayliss Ward. To pursue this work, FY23 President Ward has created two new volunteer task forces that will focus on researching and developing new licensure models and exploring new methods to measure competency.



"If we had to design a licensing path today, it would probably look very different. We need to encourage the opportunity to question what we've been doing. It may be uncomfortable, but the benefit is that we're thinking forward as an organization."

—FY22 NCARB President Alfred Vidaurri Jr., NCARB, NOMA, FAIA

#### **FUTURES COLLABORATIVE**

In 2017, NCARB established the Futures Collaborative as part of a multi-year effort to ensure licensure programs and regulation keep pace with an evolving profession. Composed of leading architects, experts in emerging technologies, and architectural licensing board members, the collaborative spent the past several years meeting with innovators in the design industry, asking challenging questions, and exploring how current trends could shape the profession.



Members of the Futures Collaborative met with other committee members both in person and virtually at NCARB's 2021 Committee Summit.

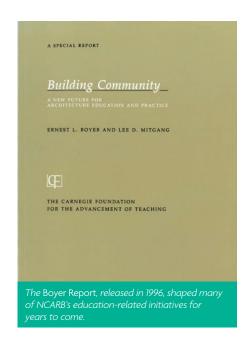
In FY18-20, the collaborative focused on identifying trends shaping the future of architectural practice and licensure and exploring how those trends might impact architectural regulation. In FY21, the collaborative utilized that research to work with NCARB's Program Continuum Advisory Committee on creating a framework for a future path to licensure. This future path would enable alignment across all programs. In FY22, the collaborative engaged with multiple subject matter experts to explore a range of future focused topics, including the interconnectivity between technology and sustainability, the progression of computational design, the automation of code compliance, and issues related to climate adaptation.

Eventually, the results of this work will be used to support updates to NCARB's education, experience, examination, and certification programs.

#### **BEYOND THE BOYER REPORT**

The architecture community has long debated the perceived gap between architectural education and practice. In 1996, Building Community: A New Future for Architecture Education and Practice (often referred to as the Boyer Report) was released, highlighting a gap that existed at the time between education and practice. The Boyer Report drove several NCARB initiatives—starting with the launch of the NCARB Prize in 2001—to help bridge the gap and better connect education with the other components of the licensure process.

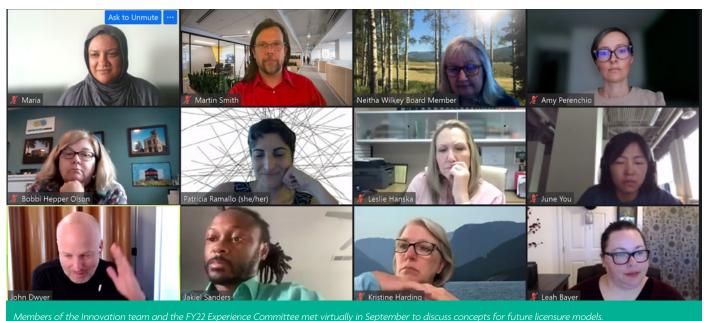
Despite being decades old, the *Boyer Report* is still referenced regularly. In FY22, NCARB worked with the AIA and ACSA to develop a research project scope and request for proposals (RFP) for a follow-up study assessing the interplay between current education and practice. This "Beyond Boyer" study will seek to understand how the landscape has shifted since the 1996 report and chart a path for improving the profession's readiness to meet the challenges of tomorrow.



#### **NCARB'S INNOVATION TEAM**

NCARB's Innovation team was established in FY21 as part of the Office of the Chief Innovation and Information Officer (CIIO). Operating at an enterprise level, the team supports departments across NCARB to promote a forward-looking vision and foster a culture of continuous learning, experimentation, and data-driven decision-making.

Throughout the year, Innovation team members collaborated with the Data & Analytics and Continuous Improvement teams to reinforce data-driven decision-making and other innovative techniques in preparation for NCARB's FY23 annual planning process. Team members also supported FARB's Future Focus team through two rounds of exercises to explore internal and external stressors with the potential to shape the future of professional regulation and the organization's role.



members of the inflovation team and the F122 experience Committee met virtually in september to aiscuss concepts for future licensure mode

To further develop a culture of nimbleness and open-mindedness across the organization, the Innovation team offered training at all levels of the organization, including but not limited to:

- Leading "Sunshine Sessions" with the Administration and Council Relations teams in the continued pursuit of emphasizing learning and encouraging experimentation.
- Hosting Brant Cooper, innovation consultant and author, for an organization-wide training on navigating
  increased complexity and endless disruption by developing a mindset that empowers people, creates value,
  and drives change.
- Hosting "Moves the Needle"—an innovation and management consulting team—for a hands-on workshop
  with senior leadership and assistant vice presidents that focused on measuring effectiveness toward desired
  outcomes and managing projects for exploration.
- Introduced new processes and innovation tools for project managers and owners supporting FY22 initiatives.
- Partnered with the staff liaisons of the Education, Experience, and Examination committees to introduce innovation frameworks and tools.

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## LEADERSHIP REPORTS

NCARB relies on the work of hundreds of volunteers to make up its membership, guide programs and services, and form its Board of Directors. Read reports from each of NCARB's officers, regions, Member Boards, and committees.



NCARB is led by its Board of Directors, which consists of 14 volunteers elected annually by the 55 Member Boards: typically 12 architects, one public director, and one executive from a licensing board. The FY22 Board of Directors' accomplishments include the following highlights:

- Maintained a rolling budget approach, allowing the organization to adapt strategically to residual impact of the pandemic and pursue new opportunities throughout the year
- Oversaw the exam's migration to a new delivery vendor, the creation and launch of six new divisional practice exams, and the introduction of an accommodation for ESL candidates
- Held blue-sky discussions exploring the idea of competency, considering future pathways to architecture licensure
- Led volunteers and staff in the development of a new organizational Vision Statement
- Oversaw NCARB's 2022 Analysis of Practice, a transformative study that will shape the future of architectural regulation and guide the development of an accessible path to earn a license
- Partnered with the Diversity Collaborative and expert consultants to continue organization-wide discussions on encouraging diversity, equity, and inclusion in NCARB's leadership structure
- Worked with CIDQ to finalize a joint report on the similarities and differences between the competencies required to practice architecture and interior design, with the goal of addressing confusion around incidental practice and collaboration
- Led critical discussion and engagement with several collateral organizations and other external partners

#### **President/Chair of the Board**

Alfred Vidaurri Jr., NCARB, NOMA, FAIA Fort Worth, Texas

#### **First Vice President/President-elect**

Bayliss Ward, NCARB, AIA Bozeman, Montana

#### **Second Vice President**

Jon Alan Baker, FAIA, NCARB, LEED AP San Diego, California

#### **Treasurer**

Kenneth R. Van Tine, AIA, NCARB, LEED AP Brighton, Michigan

#### **Secretary**

Edward T. Marley, NCARB, AIA, LEED AP Tucson, Arizona

#### **Past President**

Robert M. Calvani, FAIA, NCARB Albuquerque, New Mexico

#### **Director, Region 1**

Janet L. Hansen, NCARB, AIA, LEED AP Yarmouth, Maine

#### **Director, Region 2**

Philip M. Leinbach, NCARB, AIA, REFP, CSI Reading, Pennsylvania

#### **Director, Region 3**

Richard H. McNeel, AIA, NCARB, LEED AP Jackson, Mississippi

#### **Director, Region 4**

John Patrick Rademacher, AIA, NCARB Loveland, Ohio

#### **Director, Region 5**

David W. Hornbeek, AIA, NCARB Edmond, Oklahoma

#### **Director, Region 6**

Sylvia Kwan, FAIA, LEED AP San Francisco, California

#### **Public Director**

Gary Ey, CDT Abingdon, Maryland

#### **Member Board Executive Director**

Cathe M. Evans Raleigh, North Carolina



## **President's Report**

Alfred Vidaurri, NCARB, NOMA, FAIA 2021-2022 NCARB President

Note: This report is adapted from President Vidaurri's 2022 Annual Business Meeting speech.

It's hard to imagine that 12 months ago, I was named NCARB's new president. This year has been phenomenal. What I was really looking for during my year as president was a season of adjustment—a season of opportunity. I gave NCARB, as an organization, permission to ask the hard questions, to be self-critical, and to look at itself in the mirror and ask why not? Which road will we go down? What avenue is before us? And what direction will we take moving forward?

#### **LOOKING BACK**

By doing that, I stirred the pot a little. Many times, we're uncomfortable when we talk about change. But what we gain in these times of change is far more valuable as we look toward the future.

One of the things I've been so impressed with this year is the tremendous staff, resources, and team that NCARB has put together—our commitment to agility and flexibility have made so many things possible for the organization. Although we are still in times of uncertainty and trying to find a new normal amidst the chaos the pandemic continues to bring today, we are still going. We are creating a new rhythm in the work that we do, how we do it, and how we collaborate. I am truly proud of the work that we have done.

#### **YEAR IN REVIEW**

#### The Future of Licensure

Over the past 12 months, I have challenged NCARB as an organization to work on key areas that are of particular interest to me and near and dear to my heart. The first of these was an in-depth focus on the licensing path of the future. We are in an increasingly global society where borders are becoming more minor. Even our means of communicating are evolving and changing the way architects practice.

So, if we were tasked with designing a licensing path today, it would probably look very different than what we have in place currently for emerging professionals. As president, I wanted us to begin that work and ensure that NCARB is in a forward-thinking position.

Being a part of this discussion around the future of the path to licensure was very challenging—the commitment and effort needed to have successful, resolution-based conversations is tremendous. I leaned on our volunteer community to lead this effort. I took our committees focused on the "three E's" (our Education, Experience, and Examination committees) and designated a single blue-sky charge to each of them: to consider a path to licensure where their component was the only requirement.

I proposed to the Education Committee to create a path to licensure where education was the only requirement. What that would look like was—and still is—unknown, but the charge led them to have indepth conversations about that would change the path to licensure. I proposed something very similar to the Experience Committee. I challenged them to brainstorm a path where a candidate would go through some degree of experience that would result in becoming a licensed architect. And I challenged the Examination Committee to brainstorm what it would look like to become licensed solely by completing an exam.

These charges made people uncomfortable and shook our typical way of thinking that these three E's are critical. As uncomfortable as those conversations were, our volunteers were able to brainstorm and begin the fundamental work needed to create a licensing path that caters to emerging professionals today and critically considers what is truly necessary to achieve licensure.

But in order to dive deeper into the conversation around future paths to licensure, you have to be able to frame up and understand the conversation around competency. How you define, measure, and test competency are root, nonnegotiable issues that have to be considered.



FY22 President Alfred Vidaurri spoke at the 2021 Licensing Advisors Summit

This year, our Board of Directors really dug

into the concept of competency. At each Board meeting, we either had homework or engagement sessions where NCARB staff challenged our thinking around how we define competency. In a recent meeting, we were tasked to assess competency from the perspective of a single practitioner. We asked ourselves, "What is the scope of practice for a single practitioner? How is that different for someone at a firm of 20, 50, 100, or 1,000?"

And when we couldn't answer those questions, we asked ourselves, "What is the scope of a project for a single practitioner?" And we all came up with different responses, and the resulting discussions really stretched us as a Board and made us dive into this topic of competency.

#### **Diversity, Equity, Inclusion (DEI)**

The second issue that was near and dear to my heart was diversity, equity, and inclusion. It's been a great honor and privilege to be the first Hispanic/Latino president of this organization. I take that seriously, and I look forward to seeing more to follow in the future.

There were several promises that I made last June, when I began my role as president, in regard to diversity, equity, and inclusion.

- **Diversity and Governance Consultants:** First, I promised that one of our immediate action items was to hire consultants to help us on this journey. We hired a diversity consultant at Nonprofit HR. We also hired a governance consultant at McKinley Advisors to guide us through these conversations, because DEI is an important factor that underpins a larger conversation about governance as well. The two discussions intertwine, sometimes requiring separate conversations and sometimes needing to be discussed together. We as Board members have spent every single Board of Directors meeting devoting half a day of our three-day board meetings to these very subjects. We're having courageous conversations, and that is important work that will continue to inform us as we go further.
- Town Hall Meetings: We have held ten virtual town hall meetings to explore membership feedback on this topic, and I greatly appreciate all of our members and volunteers who took the time to participate. We received such important information that laid the foundation for our work. It was important for us to hear where our members feel we are in this journey, what impediments they face, what opportunities are available, and how we could move forward to promote greater DEI in the culture of this organization.
- **Vision Statement:** Another important promise that I committed to was for us to spend some time developing a Vision Statement. We have a great Strategic Plan, but it was silent in the area of DEI until we adopted our new Vision Statement, *ensuring safe spaces and places for all communities*, during our June Annual Business Meeting.
- Diversity Collaborative and Board of Directors Engagement: For the past several years, our Diversity Collaborative has been leading amazing work around DEI. This year, our Board of Directors met with the Diversity Collaborative for the first time, and we engaged several times throughout year. Those critical conversations helped us to understand where the Board was, where the Diversity Collaborative is, and what conversations we still needed to have. It was important for us to understand and hear each other, and to work together. We now have a greater appreciation of where we are, where we are trying to go, and what the work ahead might look like. Together, we laid a foundation to begin the work of what the future of governance in this organization could be. We will continue to meet together like this as we move forward.
- **Standing DEI Committee:** At our June Annual Business Meeting, NCARB's membership passed a resolution to create a standing DEI Committee. Similar to the other committees that require continuous conversations and charges to make improvements, our conversations regarding DEI are forever work. By passing this resolution, we are embedding this work into the culture of the organization and making ourselves even more of a dynamic organization.
- **DEI Status Report:** We also produced a mid-year report focusing on the diversity, equity, and inclusion listening sessions and documenting their outcome. This report states, "Here's what we heard and here's what was discussed," giving positives, negatives, and opportunities we'd like NCARB to consider. This is an excellent framing document that gave a sense of where we are and where we hope to be tomorrow.

The work done this year laid an evolutionary foundation. We did the hard work and had those necessary conversations about creating a more diverse, more equitable, and more inclusive culture for this organization.

Over the course of the year, I have enjoyed the opportunity to be in front of other leadership groups and our partner organizations, telling them about the work that we're doing, and our vision, opportunities, and goals. I have used that information to challenge other organizations.

One area where we have especially challenged other organizations is regarding data-sharing. This year, NCARB shared exam performance data filtered by demographic groups, which showed discrepancies in pass rates between people of color versus white candidates. So many people were nervous about sharing that data—but we wanted to be transparent as an organization, and now we're challenging others to do the same.

#### **International Relations**

Another area that has been important to me is international relations. Many years ago, I had the honor of being involved in the Tri-National Mutual Recognition Agreement, moving it from a pilot program to a full program. I wanted to continue this work.

This year we accomplished having a face-to-face meeting with our Tri-National partners, Canada and Mexico. We are reenergizing that agreement and bringing new questions and new challenges to the table, so we can evolve this into an even more valuable and important path to reciprocity across our borders.



President Alfred Vidaurri spoke alongside CEO Michael Armstrong at the 202. Licensing Advisors Summit

And for the first time ever in NCARB history,

we held an International Regulatory Round Table with individuals invited from all of the countries that we have mutual recognition agreements with, as well as others including Singapore and India. We received such great feedback from those regulatory agencies pushing to continue these conversations in the future.

#### **Other Initiatives**

We've also accomplished a tremendous amount of other work during this year. A few efforts stand out:

- The migration of our test provider from Prometric to PSI has been a part of our ongoing work to continue to look at necessary improvements needed to enhance the candidate experience.
- We have done a great deal of work with NOMA on our joint *Baseline on Belonging* study, which requires us to move forward, digging deep with the rich information pulled from our initial survey. We have one report left to release on firm culture, and we are creating additional focus groups to try to better understand the barriers that impact underrepresented groups on the path to licensure and identify solutions that address those impediments.
- And I was proud to continue the work of several past presidents to partner with our colleagues at CIDQ.

  Together, our organizations compared our requirements for competency and exam objectives and created a report on similarities and differences between our professions.
- Lineup, our for-profit subsidiary, continues to grow and expand, and I look forward to seeing it bear fruit in the future.

I am amazed at the work that has been done this year, the challenging conversations our Board has taken on, and most importantly the amount of participation we've received from all our volunteers. Thank you to all of our members and volunteers for their work throughout the year—the best is yet to come.



## First Vice President's Report

Bayliss Ward, NCARB, AIA

2021-2022 NCARB First Vice President/President-elect

Note: This report is adapted from First Vice President Bayliss Ward's Annual Business Meeting speech.

Being in NCARB leadership is a team effort. Everything we hope to accomplish in the coming year will happen because we—members, volunteers, and staff—are all engaged in this journey to "Go Further."

Sometimes, people exaggerate the role of elected leadership. The NCARB Board of Directors may not be what you expect. Our goal is not to over-involve ourselves in the work of our committees or staff, but rather to lean into open-ended questions about how to strategically position the Council to best serve all entities of the organization.

In the year ahead, I plan to expand the amazing things we've accomplished so far as an organization and use my presidency to lead discussions on how to improve communication and accessibility, remain agile, and strengthen our ability to tell our story.

One of the great privileges of serving on the NCARB Board of Directors is the opportunity to work with bright and talented colleagues from around the country. NCARB's work could not be accomplished alone. All of our community members inspire me, each carrying unique skill sets needed to set out and accomplish what lies ahead of us in the next twelve months.

#### **LOOKING FORWARD**

#### **Analysis of Practice**

In FY22, NCARB completed all three phases of the most comprehensive Analysis of Practice in our history. In the coming months, we will mine our data for ideas and indicators regarding how our licensure toolkit might grow, evolve, and change. Most importantly, we will adjust our programs to remove unnecessary impediments—which may stem from outdated approaches, unconscious bias, or well-intentioned but overly complicated steps—while still maintaining our critical focus on rigor for a reason.

#### **FY23 Committees**

One of the greatest things that NCARB's incoming president-elect gets to do is create and craft the committees, work groups, and task forces that will operate during the coming year—including the committees' charges and leadership. In FY23, our committees will be challenged by new charges that ask our

volunteers to explore a variety of paths, acknowledging that there are multiple ways to get to the licensure threshold. This year, our volunteers will also build on the Analysis of Practice work conducted this past. Accordingly, I'm establishing two new task forces to review data, explore options, and advise the NCARB Board of Directors:

- **Research & Development Task Force:** This task force will revive the concept of research and development and apply it broadly to licensure tools and models.
- **Competency Task Force:** This task force will discover how we measure competency, what it means, and how we can be realistic about the elements of new licensure versus the skills of the seasoned practitioner.

#### Diversity, Equity, and Inclusion (DEI) Efforts

In addition, we will continue focusing on the larger issues of encouraging greater diversity, equity, and inclusion—both in the profession and in NCARB's regulatory community. At the June Annual Business Meeting, our membership voted to establish a new standing committee on diversity, equity, and inclusion. I am charging the new DEI Committee to explore how it might stimulate ongoing conversation, provide important insights, and help encourage new and seasoned volunteers from all backgrounds to consider serving in leadership. This is one area of "forever work" that we need and will continue to be incorporated into NCARB's mission.

Additionally, In the coming months, a special work group will be created to continue the ongoing conversation regarding DEI in NCARB governance. This new Governance Work Group will assess data from our membership gathered at the Annual Business Meeting, feedback from our Board and the Diversity Collaborative, and information supplied by many members and volunteers in focus groups throughout FY22. This work group will be charged with developing a first draft of a resolution on NCARB governance, to be reviewed by our Board of Directors in September. The Board deliberations will lead to additional engagement with our Member Board Members. The Board will continue its discussions in January and offer a draft for membership consideration in the weeks leading up to NCARB's March Regional Summit. A final Board discussion will occur next April, with the goal of placing a resolution to update NCARB's governance structure on the agenda to be voted on during the 2023 Annual Business Meeting.

I thank these volunteers in advance. It's an impressive group, and I know they will work diligently to design an approach that will guide our discussions in the months to come.

## Refreshing NCARB's Outreach Strategy

Another key area of focus for me during the coming fiscal year is rethinking our strategy for conducting outreach to students and licensure candidates. During the year ahead, we will be putting renewed emphasis on how we conduct outreach to the many communities impacted by NCARB—including how we engage with NCARB's community of volunteer architect licensing advisors.



First Vice President Ward engages with licensing advisors at the 2021 Licensing

Throughout FY23, we will experiment with reinventing our current outreach strategy and increasing the frequency and depth of our engagement with practitioners, students, and the academy.

Using our superior communications platforms and our talented volunteers and staff, we can make new inroads to better position the next generation of architects to have meaningful coaching and mentoring experiences.

We have a great story to tell. By continuously improving our services, we have the opportunity to raise awareness and correct misinformation about our programs, the path to licensure, and NCARB's role in the profession. We can build on a strong foundation by providing additional tools, resources, and strategies to support the next generation of architects.

#### **Going Further**

I am committed to leading NCARB through the many discussions that are ahead of us in FY23. But again, this is about "we" and not just "me." When you look back at how we've grown and evolved as an organization, it's truly incredible. Our pipeline of customers is healthy. Our alliances are stronger. Our ability to support and engage our Member Boards is unprecedented. The commitment of our volunteers and staff is undeniable.

But there's still more to do. We can "Go Further" if we stay focused on inclusion, both along the path to licensure and in NCARB leadership. We can "Go Further" if we double down on telling stories that are as motivational as they are informative. And we can "Go Further" if we embrace new ideas, apply data and research, and continue to experiment.

Thank you all in advance as we step into the next chapter at NCARB.



## Second Vice President's Report

Jon Alan Baker, FAIA, NCARB, LEED AP 2021-2022 NCARB Second Vice President

### Tell us about your responsibilities as NCARB's second vice president. What were some personal highlights from the year?

As second vice president, my primary duties include being a member of NCARB's Executive Committee, which meets regularly to discuss important matters related to NCARB's strategy and finance. I also attended and participated in various engagements with allied organizations, including meetings with members of the architectural alliance, which is made up of ACSA, AIA, AIAS, NAAB, NOMA, and NCARB. Additionally, I engaged with the American Society of Association Executives (ASAE) CEO Symposium.

In my position, I also had the opportunity to participate in two volunteer efforts: as a member of our Responsible Charge Task Force and as the Board liaison to the Member Board Executives Committee.

#### You've been involved with NCARB since 2006. How has the organization evolved over the years?

During my NCARB involvement, the Council has become increasingly effective and responsive to the needs of the licensing community, Member Boards, Certificate holders, and licensure candidates. The Council has had to navigate numerous calamities such as the global pandemic and various political efforts to deregulate professional licensure. Existing programs have evolved and new programs have been created to respond to changes in professional services, candidate needs, accreditation changes, and Member Board needs. The most notable change has been in the leadership and management of the Council's operations, which has promoted transparency, inclusion, and ethics in its everyday practices.

#### What keeps you committed and motivated to continue to volunteer?

I believe architects can change the world and have the training, talent, and creativity to be at the forefront of addressing the challenges that face our society and our built environment. NCARB is in a position to exert great influence and advance significant improvements that can protect the health and safety of the public. The real power and influence that drives the Council's success is its pool of Member Boards and volunteers, and I have benefitted greatly over the years through my participation.

### You're licensed to practice architecture in 10 states. How has being NCARB certified helped you throughout your career, and why are national models for reciprocity important?

Over the years, the reciprocity provided through the NCARBB Certificate has allowed me to take advantage of a much broader range of professional opportunities. The ability to expand my practice and to respond to the needs of clients over a wider geographic range is a huge advantage in building a successful professional practice.

#### What initiatives will you focus on as NCARB's 2022-2023 first vice president?

I believe we have the opportunity to expand our offerings of alternative pathways to licensure and thereby provide opportunities to a vast population of talented and inspired candidates who have been left behind by a profession that is expensive and difficult to access. The diversity of the architectural community is severely limited due to the resources required to pursue a career in architecture and the limited opportunities for access by those lacking those resources. I believe we can substantially improve these odds and will focus on opportunities to achieve that goal.



## **Treasurer's Report**

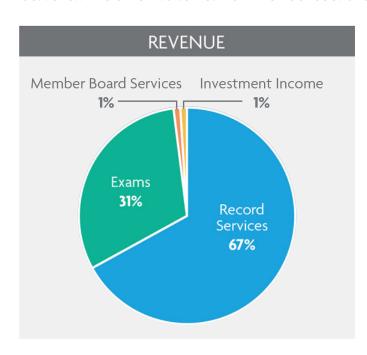
Kenneth R. Van Tine, AIA, NCARB, LEED AP 2021-2022 NCARB Treasurer

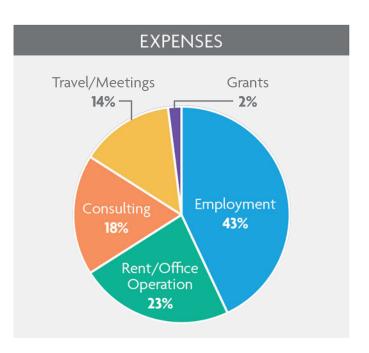
Note: This report is adapted from Treasurer Van Tine's 2022 Annual Business Meeting speech.

Immediately following the close of the 2021 Annual Business Meeting, the newly seated NCARB Board of Directors took action to approve the fiscal year 2021-2022 budget.

#### **BUDGET**

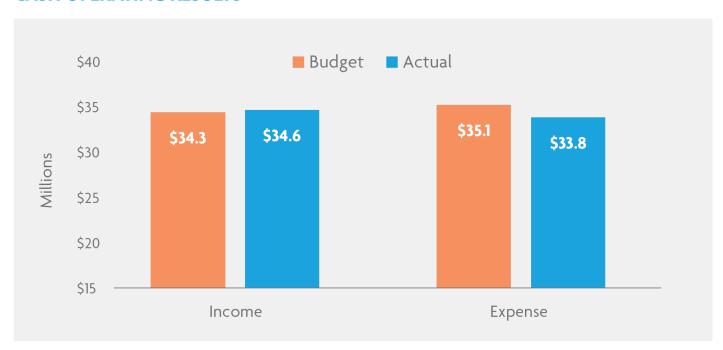
We approved a \$37 million operating budget, with 98% of the revenue coming from Record services and exam deliveries. The other 2% comes from member dues and investment income.





Our major categories of expenses include office rent and operations, employment, consulting services, travel and meeting costs, and a small fund for the National Architectural Accrediting Board (NAAB). Also included in our expenses is the Freedom by Design™ program run by the American Institute of Architecture Students (AIAS).

#### **CASH OPERATING RESULTS**



Throughout the last year, we managed to achieve our income goal. NCARB has had steady, sustained growth in the number of NCARB Certificate holders. Architects have also sought reciprocal licensure at a record pace in the past 12 months. The number of licensure candidates opening new NCARB Records today proves that we are making a recovery from pandemic lows. Our exam activity has also made a comeback and returned to pre-pandemic levels.

Expenses were approximately \$1.3 million lower than anticipated in the budget. Due to the ongoing COVID-19 pandemic, travel was halted early in the fiscal year and was not reinstated until the Committee Summit in December. Staff vacancies throughout the year also contributed to lower-than-expected operating costs. The operating surplus from these expense savings will be funneled back into ongoing improvements in Council programs and services.

#### **BENEFITS TO LICENSURE CANDIDATES**

The FY22 budget funded several initiatives for licensure candidates including:

- We eliminated NCARB's portion of the exam rescheduling fee, permanently reducing the cost to reschedule an exam for candidates.
- We also provided direct support for candidates choosing to use online proctoring to take the exam.
  - We continued providing funding to first-time online testers, so they could purchase an external video camera, which is required for online proctoring.
  - We continued to cover the cost for candidates to do an online proctoring system check—providing them the time and opportunity to identify and resolve technical glitches before their testing appointment.
- And, throughout the year, we have invested in new practice exams that will give candidates a better preview of the look and feel of the exam while providing appropriate study material. These are available at no cost to all candidates.

#### **STATUS OF FUNDS**



Over the past few years, we have had significant growth in the Council's Strategic Reserves—a good portion of which was due to market gains in the investments, as well a change to reduce the target balance in the operating fund to make more funds available to expand innovation and strategic efforts. This also provided an opportunity to expand our investments and create the Strategic Growth Fund. This new fund is geared to increase investment earnings to help fund strategic initiatives in the future.

The Council currently has approximately \$27 million distributed between the Strategic Reserves and Strategic Growth Fund.

The recent volatility in the investment market has resulted in a 10% drop in these reserve accounts in recent months. However, we maintain sufficient balances in these accounts to allow for market volatility. Our policies and our work with our investment advisors protect opportunities to continue investing in our programs, services, and resources for Council stakeholders.

#### **STRATEGIC RESERVES**

Each year, the Board of Directors conducts an Opportunity and Risk Assessment. This empowers us to invest in opportunities and mitigate against risks with Strategic Reserves funds, without impacting core services. As a part of this annual assessment, we identify the potential costs of the opportunities and risks and consider the likelihood, and level of impact associated with each scenario. The assessment also supports the minimum target balance for the Strategic Reserve Fund at \$21.2 million.

#### **INNOVATION**

In FY22, the Board invested approximately \$1.8 million of the Council's Strategic Reserve funds to support the following product enhancements:

- Redesigning NCARB's customer management system, also known as My NCARB. This is the personalized interface that our Record holders experience when they log into our portal. For many of our customers, it's their main point of connection with us, and where they go to see and update their career information.
- Migration of the exam to a new exam vendor (PSI). As we transition to this new vendor for both test center and online proctored exams, we have invested in a more integrated customer service system, providing more flexible and less expensive exam rescheduling.
- New online, on-demand continuing education (CE) content for our Continuum Education program. This is a benefit for Certificate holders that provides free CE courses in a variety of health, safety, and welfare (HSW) content areas.
- We also made an upgrade to our website to ensure we keep pace with web technology and remain a go-to source of information, not just for our customers, but also for journalists and people considering a career in architecture.

#### **USE OF STRATEGIC RESERVES**

The Board authorized an additional \$1 million in Strategic Reserves to:

- Fund the Analysis of Practice study.
- Partner with AIA and ACSA in developing the concept for the new "Beyond Boyer" study, which assesses the
  dynamic between the academy and practice.
- Support the diversity, equity, and inclusion (DEI) work of the Board and Diversity Collaborative.
- Expand our internal Fairness in Licensure study, analyzing the AXP and ARE through a DEI lens.
- Fund an ARE readability study to understand the exam performance impact of speaking English as a second language.
- Fund the next phase of *Baseline on Belonging*, our partnership with the National Organization of Minority Architects (NOMA).
- Perform accessibility audits of our technology platforms.
- Fund special purpose task forces related to responsible charge and incidental practice.

The investment of \$1.8 million in new program enhancements and the \$1 million spent on these efforts, total an expenditure of \$2.8 million from Strategic Reserves toward opportunities for the Council.

#### **MOVING FORWARD**

Despite recent market volatility, our finances and reserves remain healthy. The Council is committed to doing more than just building our reserves. We are committed to leveraging our financial assets for the benefit of the Council. I'm sure in the years to come, the effort to balance the financial health of the Council with the opportunity to advance our services to customers as well as our Member Boards will continue.



## Secretary's Report

Edward T. Marley, NCARB, AIA, LEED AP 2021-2022 NCARB Secretary

## Before being elected secretary, you served as the Arizona Board of Technical Registration's chair and vice chair. How do you think your experiences in these roles prepared you for your role as secretary?

In my role as the Arizona Board chair, I was responsible for reviewing correspondence and meeting minutes for accuracy before they were issued for board approval. These tasks were very similar in my role as NCARB secretary. The role of board chair also requires that you be able to take on and respond to tough questions and issues from time to time. My experience allowed me to be prepared when presenting resolutions to NCARB membership.

## You have offered your expertise to many NCARB efforts, including the Broadly Experienced Architect, Credentials, Policy Advisory, and Regional Leadership committees. What motivates you to volunteer so much of your time to the architecture profession?

The profession of architecture has given me so many opportunities, and I feel it is imperative that I give something back. I also want to ensure that the future of our profession is preserved for generations to come. I have found that NCARB is the place where I can be most effective in shaping the future of our profession.

### You were the FY22 Board liaison to the Policy Advisory Committee. What role does the committee play in NCARB's processes, and why is their work important?

NCARB's Policy Advisory Committee is charged with reviewing any potential resolutions that may be put forward to NCARB's membership and providing feedback to the Board of Directors. The committee is responsible for evaluating how potential resolutions or policy changes fit within the bigger picture of NCARB's policies and procedures. The committee includes the chairs of all six NCARB regions, who offer suggested revisions and feedback to ensure that any changes are reflective of all NCARB's members. The resolutions are updated as necessary based on their feedback before they are finalized for voting by NCARB's membership.

The Policy Advisory Committee also reviews existing NCARB documents for impact and consistency, offering advice on policy-related issues to the Board of Directors. This offers transparency into any potential updates to NCARB's policies and governing documents, ensures that all NCARB's members have a representative at

the table when changes are considered, and provides upcoming NCARB leaders with the opportunity to become familiar with NCARB's processes and policies.

#### NCARB's members voted on seven resolutions this year. Can you tell us a little about them?

NCARB's members passed all resolutions that were put forward for a vote this year at the Annual Business Meeting. They included:

- A new Mutual Recognition Agreement (MRA) with the United Kingdom that would provide reciprocity for architects licensed in both countries. This is expected to be implemented in spring 2023.
- An amendment to our NCARB Model Law and Regulations document, updating the definition of "responsible charge" and changing the term to "responsible control," bringing NCARB's language into alignment with current practice.
- Two omnibus resolutions to sunset outdated policy resolutions that did not align with how NCARB currently operates.
- An amendment to the *NCARB Bylaws*, creating a new standing committee on diversity, equity, and **inclusion**. This transforms NCARB's Diversity Collaborative into a permanent committee.
- Omnibus updates to the NCARB Bylaws, which added the Northern Mariana Islands back to our list of regional membership, ensured we consistently used gender-neutral pronouns throughout, and clarified language around elections.
- A refresh of the requirements for NCARB certification in the *Certification Guidelines*, updating language for clarity and consistency throughout the document and making other minor changes.

#### Can you tell us about an initiative the Board has worked on this year that you're proud of?

It may not be a specific initiative for this year, but I'm particularly excited about our work on exploring competency and how we explored the "what ifs" of different approaches to licensure through exam-only, education-only, and experience-only routes to licensure. It is this type of thought-provoking exercise that keep this organization on the forefront of our profession and regulation.

#### How can members and the public stay informed about NCARB's activities?

Members can stay up-to-date with Board activities by visiting the Member Board Community, as well as participating in the pre- and post-BOD meeting calls with their regional leadership. Board minutes and BOD Briefs are uploaded to the community and sent to members after each meeting. The public can find the latest news on NCARB's programs on nearb.org and our social media channels.



# Past President's Report

Robert M. Calvani, FAIA, NCARB 2021-2022 Past President

## When did you first become involved with NCARB, and what inspired you to give back to the profession?

I was appointed to the New Mexico Board in 2003, and I became an NCARB volunteer soon after. I began as an ARE item writer, writing questions about toilets, foot candles, and elevators. I have always seen and have been impressed with how NCARB and its initiatives and programs influence the profession, my firm, our team members, and what we do as architects every day.

#### What was the most rewarding aspect of being president of NCARB?

When serving as president of NCARB, you become immersed in all the programs, committees, and committee charges. Being able to see the progress in their work was really satisfying and exciting. I especially enjoyed the interaction with the CEO, NCARB staff, and their work. Giving almost half my work week to NCARB, you can imagine how involved and dedicated you become to the success of what we do on so many fronts.

#### How has NCARB evolved since you first volunteered?

It has been 20 years since I first volunteered, and over this time I have seen NCARB really improve in its relevancy to the profession and in its transparency in all that the organization does and offers. We have improved our services to all our customers: the 55 jurisdictions, Certificate holders, emerging professionals, and the architectural community.

#### What was your favorite committee to work on?

Over the many years, there have been quite a few. I enjoyed chairing the Examination Committee and the ARE 5.0 Test Specification Task Force, which led the transition to ARE 5.0. The Model Law Task Force was certainly interesting. Working on restructuring the AXP and ARE to be more practice-based was rewarding as well.

#### Tell us about the major initiatives NCARB focused on during your presidency.

NCARB was in the process of several major initiatives, including the broad topic of diversity, the new look at different paths to licensure, responsible control, incidental practice with engineers and interior designers, and our involvement with schools of architecture and the professional practice community. Many of these will continue to evolve and improve.

#### What are your expectations for the organization in the future?

NCARB and its leadership have a process that is somewhat seamless between its Board of Directors and its leaders over the transition between the years. Many initiatives take years to evolve and come to fruition. I look forward to NCARB's constant quest for improvement on many issues that will improve the regulation of the profession.

#### How do you plan on staying involved with NCARB?

I am still volunteering for committee work, just like I began 20 years ago.

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## COMMITTEE REPORTS

NCARB has more than a dozen standing committees, subcommittees, and task forces that meet throughout the year to review topics including education, the AXP, the ARE, certification, and more. Made up of volunteers from across the profession—including members of state licensing boards, practicing architects, licensure candidates, and collatera representatives—these groups help steer the organization by reflecting on our programs and policies and making recommendations for improvement.

In FY22, NCARB had over 360 volunteers, including members of licensing boards, practicing architects, licensure candidates, and representatives from related organizations.

#### **Standing Committees**

Each year, NCARB's standing committees explore topics that are central to NCARB's mission, goals, and objectives. The purpose and existence of these committees are outlined in the *NCARB Bylaws*. When necessary, standing committees may have subcommittees or task forces that report to the standing committee.

# CREDENTIALS COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: Catherine C. Morrison AIA, NCARB, LEED AP BD+C North Carolina Member Board Member

Charles L. Ward III
California Member Board Member

Sandra M. Matsushima
Hawaii Member Board Executive

Allison McClintick
Idaho Member Board Member

Albert Zaccone FAIA New Jersey Member Board Member

Caitlin Stromberg
Staff Liaison

#### **Committee Purpose**

Members of the Credentials Committee oversee the nomination and election process for positions on the Board of Directors, verify candidate qualifications for office, examine and verify voting delegate credentials, report to the membership regarding quorum at the Annual Business Meeting, and tabulate and report election results to the president/chair of the Board. The Credentials Committee contributes to the evolution and improvement of the nomination and elections process, as well as provides feedback on existing procedures and offers advice to the Board of Directors.

#### Report

Highlights

- As part of the committee's charges, committee members ensured that all candidates for the FY23 NCARB Board of Directors met qualifications.
- The committee also successfully executed the elections of multiple contested races during the Annual Business Meeting.

# **EDUCATION COMMITTEE**



#### **COMMITTEE MEMBERS**

Chair: Kevin Singh AIA, LEED AP BD+C, NCARB Louisiana Member Board Member

Linda Alfson Schemmel

Melanie D'Souza Assoc. AIA, EDAC

**Robert Easter** 

Mark Flemming

Maryland Member Board Member

Brian M. Kelly

NCARE

Nebraska Member Board Member

Whitney Martin AIA, NCARB

Emmanuel Moreno

CCCAP Liaison

Marilys Nepomechie

NAAB Liaison

Stephen D. Schreiber

FAIA, DPACSA

Nathaniel St Jean

AIA, NCARB

Brian Tibbs

RA, AIA, NCARB

Tennessee Member Board Member

Adriana Tzigantcheva

AIA, NCARB, EDAC

Ingalill E. Wahlroos-Ritter

FAIA, NCARB

Travis Wiegand

NCARB, RA, CID

David W. Hornbeek

AIA, NCARB

Board Liaison

Jeremy Fretts

AIA, NCARB, M.A. Ed.

Staff Liaison

#### **Committee Purpose**

Members of the Education Committee contribute to the development of programs and initiatives impacting architecture education. Examples of initiatives include oversight of the *NCARB Education Standard*, education alternatives for NCARB certification, Integrated Path to Architectural Licensure (IPAL), and lifelong learning opportunities.

#### Report

#### Highlights

- As with each core program committee this year, the Education Committee was charged with the thought experiment of attempting to design an "education-only" path to licensure. This "thinking outside the box" work is a precursor to the work of the FY23 task forces to identify possible alternative paths to licensure.
  - The members focused on competency as a distinct pass-fail approach, with learning fixed but time to completion variable. An approach like this would require assessment criteria to be determined by NCARB.
- Continuing work suggested by the FY21 Education Committee, the FY22 group further investigated the role of pre-collegiate educational preparedness prior to acceptance to B.Arch. programs. Reframing the original charge, the committee sought to "identify ways students from historically underrepresented race, gender, economic, or other minorities can prepare for success in architecture prior to entering college." The committee reviewed selected readings and began discussions on this work jointly with the Licensure Advisory Forum and the Diversity Collaborative, particularly focusing on identifying barriers to success. Then, the Education Committee discussed ways in which NCARB might better support pre-collegiate preparation for architecture school. Key themes that emerged included outreach to middle schools and better informing high school students and college freshman about the requirements for licensure. The committee also thought it important to facilitate stronger connections and articulation agreements between community colleges and universities, and to better publicize those agreements. For example, encouraging licensure boards to specifically promote articulation agreements in their jurisdictions.
- Committee members also provided critical review of three new proposals for IPAL options.

## CONTINUING EDUCATION SUBCOMMITTEE



#### **SUBCOMMITTEE MEMBERS**

Chair: Linda Alfson Schemmel

AIA, NCARB

Hypatia Alexandria Virginia Member Board Member

**Kerry Bartini** AIA, NCARB

Frank Brescia

Justin D. Brinson NCARB

James A. Chaney FCSI, CCS, CCCA

Carly De La Hoz

Elizabeth Dunay AIA, NCARB

Glenn Gall

Michelle Gillette-Murphy AIA, NCARB

Illinois Member Board Member

Leon Holloway

William Hurley

AIA, NCARB, LEED AP BD+C Arkansas Member Board Member

Bhujon Kang

**Brooke McCurdy** 

Jack Morgan

Lori SchraderBachar

Iowa Member Board Executive

Sreedevi Moodahanglur Sooryanarayana

EDAC, LEED Green Assoc., Assoc. AIA

Douglas L. Steidl

FAIA

Ohio Member Board Member

Roberto Yumol

AIA, LEED AP

Hawaii Member Board Member

Courtney Zunis

Jeremy Fretts

AIA, NCARB, M.A. Ed.

Staff Liaison

#### **Committee Purpose**

Members of the Continuing Education Subcommittee contribute to the development and/or evaluation of continuing education related initiatives. Examples include NCARB's continuing education programs and collaboration with the AIA to evaluate the HSW content of proposed seminars and tours for their national convention.

#### Report

#### Highlights

- Subcommittee members reviewed 30 existing NCARB Continuum Education courses, providing feedback used to improve the courses prior to renewal. They also reviewed author proposals for four new courses, providing feedback to improve the learning objectives and content.
- Members also reviewed 108 proposals for sessions at the AIA Conference on Architecture, identifying 21 that were recommended for rejection or revision. (Note: AIA sent the subcommittee all proposed sessions for review, including those that they had already flagged as problematic.)
- In response to its charge regarding state-specific jurisprudence CE courses, the subcommittee identified new and existing ways to educate architects about jurisprudence. The members were united in their opinion that requiring state-specific jurisprudence courses was unlikely to reduce disciplinary cases.
- In developing suggestions for how to approach jurisprudence education, the subcommittee identified three overarching categories:
  - Disciplinary cases
  - Periodic refresher courses (explicitly NOT an annual requirement)
  - Code or regulation updates
- The subcommittee also observed that there should be a focus on those persons whom architects supervise and the familiarity of those (unlicensed) persons and their compliance with state laws.

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## CERTIFICATION ALTERNATIVES REVIEW TEAM



#### **TEAM MEMBERS**

Mark Aspaas AIA, NCARB

Allen J. Bacqué

AIA, NCARB

Louisiana Member Board Member

Joshua Barnett

AIA

T. Rexford Cecil

NCARB, AIA Emeritus

Danny D. Clark

NCARB, RA, LEED Green Assoc.

Joseph Cruz

NOMA, AIA, NCARB

Gary Demele

FAIA, NCARB

Debra Dockery

FAIA, NCARB

Texas Member Board Member

April C. Drake

AIA, NCARB, LEED AP ID+C Virginia Member Board Member

Tian A. Feng

FAIA, FCSI

California Member Board Member

Shannon D. French

AIA, NCARB

Louisiana Member Board Member

David E. Heyne

AIA, NCARB, LEÉD AP

Susan Schaefer Kliman

Ph.D., AIA, NCARB, LEED AP

Michael G. Kolejka

AIA, NCARB, LEED AP

Arizona Member Board Member

Mark R. McKechnie

AIA, NCARB

John F. Miller

FAIA, NCARB

Jonathan C. Moore

AIA, LEED AP BD+C, NCARB

Carole E. Pacheco

AIA, NCARB

Georgia Member Board Member

Matthew Peddie

AIA, LEED AP, NCARB

Roula Habash Qubain

AIA

North Carolina Member Board Member

Roark Redwood

Juan Riestra

AIA, NCARB, WELL AP

Raul Rivera-Ortiz

AIA, NCARB

Cheryl C. Walker

FAIA, NCARB

Yingfei Wang

AIA, LEED AP

**Brittney Cosby** 

Staff Liaison

#### **Team Purpose**

Members of the Certification Alternatives Review Team (CART) are responsible for evaluating NCARB Certificate Portfolios submitted in support of obtaining NCARB certification through the Education Alternative. This team is also responsible for reviewing dossiers and conducting interviews in support of an application for certification through the Tri-National Mutual Recognition Agreement. The review of all portfolios is performed virtually and independently through a work-flow process.

#### Report

#### Highlights

- During FY22, architects' interest in obtaining NCARB certification through the Education Alternative's
   Certificate Portfolio process remained steady. The CART saw improved success in exhibits presented by
   applicants in their reviews, based on additional information recommended by the FY21 CART and included in
   the "NCARB Certificate Portfolio Applicant Guide."
- A Mexican architect applied for licensure in the United States and Canada through the Tri-National Mutual Recognition Agreement, requiring a dossier review and interview team. NCARB selected evaluators from the CART for the U.S. application, who successfully reviewed the applicant's dossier and conducted an in-person interview for the U.S. and Canada.

#### Summary of Charges

• During FY22, the CART implemented recommended modifications to Certificate Portfolio documents and exhibit requirements for each subject area in the Certificate Portfolio to better align with NCARB's *Education Standard* criteria.

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## EXAMINATION COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: Wayne G. Hilbert AIA, NCARB, CSI, CSS, LEED AP

Subcommittee Chair: Deborah Huff

AIA, NCARB, LEED AP BD+C

Subcommittee Chair: J. Brent Lance

AIA, NCARB LEED AP

Subcommittee Chair: Christine Snetter-Dick

AIA

Catherine Fritz

AIA

Alaska Member Board Member

Darryl R. Hamm

Pennsylvania Member Board Member

Lisa Howard

Oregon Member Board Executive

Matthew Okazaki

Nichole Perkins

Catherine C. Polk AIA, NCARB, LEED AP

Michael Samuelian

FAIA

New York Member Board Member

Cynthia Shonaiya

AIA, NCARB, LEED AP

Maryland Member Board Member

Corey R. Solum

AIA, NCARB

Utah Member Board Member

Gregory D. Wynn

AIA, NCARB

Sylvia Kwan

FAIA, NCARB, LEED AP

Board Liaison

**Brett Foley** 

Consultant

Amanda Wolkowitz

Consultant

Joan Paros

Staff Liaison

#### **Committee Purpose**

The Examination Committee oversees the research initiatives related to the development, delivery, and assessment of the ARE for use by all 55 licensing boards. This committee is composed of the chairs of the ARE subcommittees and task forces, as well as a limited number of at-large appointees necessary to provide insight from the perspective of educators, recently licensed architects, licensure candidates, and the public.

#### Highlights

The primary charge of the FY22 Examination Committee was to develop and propose a theoretical examination-only path to licensure that would ensure NCARB's interests in protecting public health, safety, and welfare. This charge was completed successfully, with the resulting report supporting the work of future NCARB task forces and committees.

#### Summary of Charges

- The Examination Committee approved an updated ARE score report that provides enhanced, detailed feedback to candidates who fail divisions of the ARE.
- The committee also monitored the work of the ARE subcommittees through regular reports from the subcommittee chairs.
- With support from NCARB's psychometric consultants, the Examination Committee evaluated if psychometric differences exist between online versus onsite delivery of the ARE.
- As a joint charge with the Education and Experience Committees, the Examination Committee determined
  the perceived strengths and weaknesses of the current programs in place to evaluate competency for
  initial licensure.

## **ARE 5.0 CASE STUDY SUBCOMMITTEE**



#### **SUBCOMMITTEE MEMBERS**

Chair: J. Brent Lance AIA, NCARB LEED AP

William Johnson

Staff Liaison

#### **Construction & Evaluation Work Group**

Coordinator: Mark Sangin

Katie Lynn AIA. NCARB

Stephanie Clarkson

**Dmitriy Kazakov** 

Richard McKinley

#### **Practice Management Work Group**

Coordinator: Brian

Fujiwara

AIA

Hawaii Member Board Member

Michael Archer AIA, NCARB, LEED AP BD+C **Kurt Basford** 

AIA, NCARB, LEED AP BD+C

Carole E. Pacheco

Georgia Member Board Member

Susan Scarlet-Macaw

NCARB, AIA, CSI

#### **Programming & Analysis Work Group**

Coordinator: Erin Fox NCARB, LEED AP, CDT

Katelyn Nunn AIA, NCARB, EDAC

Eric E. Anderson

Zahra Hassanipour

AIA

Daniel J. Topping AIA, NCARB, LEED AP BD+C

#### Project Development & Documentation Work Group

Coordinator: J. Brent Lance

AIA, NCARB LEED AP

Noelle Mook

LEED AP

Thomas Krejci

Andrew Shelby AIA, NCARB, LEED AP BD+C

Scott Oglesby

AIA, NCARB

#### **Project Management Work Group**

Coordinator: Rachel Harman Clarence D. Olsen

AIA, NCARB

Melissa Ford

**Christine Smith** 

AIA. NCARB

David Frey

FAIA, DBIA, LEED AP BD+C

#### **Project Planning & Design Work Group**

Coordinator: Jessica O'Donnell

AIA. NCARB

Anthony Cosentino AIA, NCARB, LEED AP

**Gedeon Trias** 

Martina Bello

R. Matthew Conard AIA, LEED AP BD+C, WELL AP,

EDAC

#### **Subcommittee Purpose**

The ARE 5.0 Case Study Subcommittee is responsible for developing case study scenarios and coordinated resource documents to be used by the ARE 5.0 Item Development Subcommittee for the development of case study questions in each division of ARE 5.0.

#### **Report**

Highlights and Summary of Charges

- The ARE 5.0 Case Study Subcommittee developed two case study scenarios with coordinated resource documents for each division of ARE 5.0.
- Along with the development of the case studies, the subcommittee identified the ARE test specification objectives each case study scenario is expected to support to maximize opportunities for future item development.
- In FY23, the ARE 5.0 Item Development Subcommittee will author questions for these finalized case studies.

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## **ARE 5.0 FORMS ASSEMBLY SUBCOMMITTEE**



#### **SUBCOMMITTEE MEMBERS**

Chair: Christine Snetter-Dick

Susan Cooley

Consultant

Laura Brooks PMP, ICE-CCP Consultant

William Johnson

Staff Liaison

#### **Construction & Evaluation Work Group**

Coordinator: Andrea Lucas Peter Koehler AIA NCARR

Taryn Petrela Monica Green

Ohio Member Board Member

Winston Thorne

#### **Practice Management Work Group**

Coordinator: Kendra E. Logan

Courtney Brand

Michael Chapman

AIA, LEED AP

Candace Wong

Alabama Member Board Member

AIA

Roan Isaku AIA, NCARB

**Brent Reif** Consultant

#### **Programming & Analysis Work Group**

Coordinator: Laura H. Riegler

Tonya Ohnstad

AIA, LEED AP, NCARB

**Gregory Overkamp** AIA, WELL AP, LEED AP, NCARB

Chris Hyun NCARB, LEED AP BD+C

**Julie Torres** 

Faisal Mohsin NCARB, AIA, ARB, RIBA Consultant

#### Project Development & Documentation Work Group

Coordinator: Jeffrey Heath Perry

Samuel Mathau

Caroline Buckner

Mario Walker

AIA, APA

NCARB, AIA, NOMA, LEED Green

Stefania Fleck Kristina Hollowell

AIA, NCARB, LEED AP Consultant

#### **Project Management Work Group**

Coordinator: Craig Michael Shannon

Adrianne Steichen

AIA, NCARB, LEED AP

**Kermit Thompson** 

Ting-Hsuan (Delia) Chang

Sarah Hughes

Joseph Cruz

NOMA, AIA, NCARB

Consultant

#### **Project Planning & Design Work Group**

Coordinator:

**Kelsey Richey** 

Martina Bello

**Eric Street** 

Clayton Cowell

Robert W. McKinney

Casey Johnson

Consultant

Ed.D., NCARB

#### **Subcommittee Purpose**

The ARE 5.0 Forms Assembly Subcommittee is responsible for quality control of the assembled exam forms to be delivered to ARE 5.0 candidates, as well as reviewing newly-authored items to be used on these forms.

#### **Report**

Highlights and Summary of Charges

- In FY22, the ARE 5.0 Forms Assembly Subcommittee completed several ARE quality control review assignments to prepare new test forms for delivery to ARE 5.0 candidates, so that all items delivered to candidates are properly formatted.
- The subcommittee ensured that all items aligned to the ARE item writing standards and that assembled exam forms contained no items that overlap or cue other items within the same form.

## **ARE 5.0 ITEM DEVELOPMENT SUBCOMMITTEE FY22**



#### **SUBCOMMITTEE MEMBERS**

Chair: Deborah Huff AIA. NCARB. LEED AP BD+C

Terrance Gutberlet

Staff Liaison

Ben Sutter Staff Liaison

Sheronne Wilson

Staff Liaison

**Omari Winslow** 

Staff Liaison

Michael Yates Staff Liaison

#### **Construction & Evaluation Work Group**

Coordinator: Pearl McLin

AIA, LEED AP BD+C, NCARB

Coordinator: Edward W. Tucker

FAIA. NCARB

Michael Bonick

Tyler Cini

AÍA, NCARB

Ramsey Dabby

Justin Dowhower RA, AIA, LEED AP, WELL AP

**Christopher Gerrity** 

AIA, LEED AP, NCARB, Assoc. DBIA

Jennifer Knop

Maxim Nasab

AIA. NCARB

#### **Practice Management Work Group**

Coordinator:

John Beystehner

Coordinator: Brent Frick

Leigh Jaunsen

Mississippi Member Board Member

Katherine Keller-Kratzer

RA. NCARB

Asli Duru Meric

AIA. NCARB

Ralph Raymond AIA. NCARB. NOMA

Jerry Roller

AIA, LEED AP, NCARB

Pennsylvania Member Board Member

J. Sanders Tate

AIA, NCARB

South Carolina Member Board

Member

**Edward Wolfstein** 

AIA, MRAIC, NCARB

#### **Programming & Analysis Work Group**

Coordinator: Miranda Beystehner

Coordinator:

Andrew Malanowski

AIA. NCARB

Carly Fenton

Carlos A. Murrieta

AIA, NOMA, NCARB, LEED AP

BD+C

Andrew Lee

AIA. OAA

Thomas Provost

Li Ren

AIA, NCARB, LEED AP BD+C

Zachary Stoltenberg

AIA, NCARB

**Bryan Turner** 

FAIA

Dagmara Ziolkowska

AIA, LEED Green Assoc.

#### **Project Development & Documentation Work Group**

Coordinator: Steven Jones

NCARB. LEED AP BD+C

Coordinator:

Vivian Workman AIA, NCARB

Anibal Bellomio

NCARB. LEED AP BD+C

**Christopher Biggers** 

James Devine

NCARB, AIA, LEED AP North Dakota Member Board

Member

Colin Jones

AIA, NCARB, LEED AP

Washington Member Board Member

Joshua Mollenkamp

Yike Qin

PE. AIA. LEED AP

Robert Santaniello

Jesse Santiago

Rebecca Schwartz

Julie Trinh

AIA, NOMA, NCARB

#### **Project Management Work Group**

Coordinator: Stephen Alex Booth

Coordinator: Jennifer Myers AIA, NCARB, LEED AP Michigan Member Board Member

Steven Wade Braun AIA, NCARB, RA

Tyler Curl
AIA, NCARB, LEED AP BD+C

Ryan Ford AIA, NCARB

Julia Hartman

AIA

Tram Anh Pham NCARB, LEED AP BD+C

Abdulrazaq Ogun AIA, LEED Green Assoc.

Philip Riazzi

Kendrick Richardson

**Sébastien Simonnet** AIA, NCARB, LEED Green Assoc.

Kyonta Smith

#### **Project Planning & Design Work Group**

Coordinator: Jarr Brandon Hepburn

Coordinator: Cynthia Mueller AIA, NCARB, LEED AP BD+C

Marion Bledsoe

**Edward Brya** 

William Caple

AIA

Ahmed Emara

Casey Hagen
AIA, NCARB, LEED AP BD+C

Jarret Hudson

Fokruddin Khondaker

AIA, NCARB

**Andrew Mailloux** 

Joseph Miller

Frank W. Wagster
AIA, NCARB, LEED AP BD+C
Tennessee Member Board Member

Raymond R. Vigil AIA, CSI, LEED AP

Virginia Member Board Member

Ruobing Xia

#### **Subcommittee Purpose**

The ARE 5.0 Item Development Subcommittee developed and reviewed individual items and case study items for both the operational ARE and the new ARE practice exams.

#### Report

Highlights and Summary of Charges

- The ARE 5.0 Item Development Subcommittee developed newly authored case study items, using scenarios developed by the ARE 5.0 Case Study Subcommittee, and developed discrete items to ensure the item pool of the operational ARE is replenished.
- The subcommittee reviewed the performance of pretested items and operational items to determine the future status of each item.
- In addition to writing items for the operational ARE, the subcommittee authored new case study items and discrete items for NCARB's new ARE practice exams for each division, which were made available to candidates at no cost.

# **EXPERIENCE COMMITTEE**



#### **COMMITTEE MEMBERS**

Chair: Leah Bayer AIA, NCARB

Gabriella Bermea AIA, NCARB, LEED AP

Greg L. Durrell AIA, NCARB, NOMA

John Dwyer AIA, NCARB

Leslie Hanska

Oklahoma Member Board Executive

Kristine Annexstad Harding FAIA, NCARB

Bobbie Hepper Olson AIA, NCARB

North Dakota Member Board Member

Amy Marie Perenchio

AIA, LEED AP

Neitha Wilkey

RA

Juan You

Gary Ey

Board Liaison

Martin Smith

AIA, NCARB Staff Liaison

#### **Committee Purpose**

Members of the Experience Committee contribute to the development of programs and initiatives impacting the architecture experience requirement. Examples of initiatives include the development of the AXP.

#### Highlights

- Engaged with the Education Committee at multiple meetings throughout the year to identify various roles that contributors hold in the practice of architecture and what responsibilities those roles hold when it comes to protecting the health, safety, and welfare of the public.
- Participated in Committee Summit conversations with various other volunteer groups.

#### Summary of Charges

- Created a theoretical experience-only path to further future discussions on the current licensure path.
- Along with the Education Committee, Experience Committee members discussed several roles in the
  profession that protect the health, safety, and welfare of the public, while being inclusive of backgrounds
  and abilities.
- Identified aspects of AXP and organized them regarding the aspect's value to the development of competency compared to the control NCARB has regarding that aspect's quality.
- Completed a strengths, weaknesses, opportunities, and threats (SWOT) analysis of the current licensure path and identified one thing about the AXP that each member would like to see changed, which will feed into future NCARB discussion in combination with the Analysis of Practice.

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# MEMBER BOARD EXECUTIVES COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: Shannon Himes
Ohio Member Board Executive

**Shana W. Bryant**Arkansas Member Board Executive

**Esther Fleming** 

Northern Mariana Islands Member Board Executive

Bobbie Mayo

New Hampshire Member Board Executive

Laura Zuniga

California Member Board Executive

Jon Alan Baker FAIA, NCARB, LEED AP

Board Liaison

Caitlin Stromberg

Staff Liaison

#### **Committee Purpose**

Members of the Member Board Executives (MBE) Committee consider issues of concern to the licensing boards and Member Board Executives, develop the agenda for the Spring MBE Workshop, and serve as a focus group for the Board of Directors and Council staff.

#### Report

Highlights

- The committee assessed the continued effectiveness of the current Member Board Executives Workshop and designed the FY22 workshop agenda to ensure maximum engagement from both in-person and virtual attendees.
- The committee worked with NCARB staff in developing an asynchronous Quality Assurance Audit and shared findings on the MBE Community.
- Members also contributed to updates to the MBE Handbook, ensuring the migration to PSI was accurately reflected.
- With the launch of the MBE mentoring program, six mentors and mentees were matched for the year.
- The committee provided feedback to NCARB, as requested, relative to system tools, including the transmittal feedback tool and the Licensing Management System so the perspective of the MBEs and licensing boards continue to be considered in program and service development.

## POLICY ADVISORY COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: Lenora A. Isom AIA, NCARB, LEED AP Nebraska Member Board Member

Jennifer R. Arbuckle NCARB, AIA, LEED AP

Emily Cronbaugh

Wyoming Member Board Executive

**Brett Foley** 

Ph.D.

Nebraska Member Board Member

Melarie Gonzales

New Mexico Member Board Executive

George H. Miller

FAIA

New York Member Board Member

Margaret (Meg) S. Parsons

FAIA, NCARB, LEED AP BD+C, ALEP Minnesota Member Board Member

Miguel A. Rodriguez

FAIA, NCARB

Florida Member Board Member

Tara Rothwell

AIA, NCARB, LEED AP

New Mexico Member Board Member

Edward T. Marley

NCARB, AIA, LEED AP

Board Liaison

Vanessa Williamson

CAE

Staff Liaison

#### **Committee Purpose**

The Policy Advisory Committee (PAC) reviews proposed resolutions, procedures, and documents for their impact on and consistency with Council policies and programs and makes recommendations on such matters to the Board of Directors. The committee also assesses the usefulness of special Council publications and modifies them as appropriate.

#### Highlights

- The PAC sponsored and advocated for several FY22 NCARB resolutions related to *Bylaws* updates, sunsetting outdated resolutions from past decades, updates to NCARB's *Certification Guidelines*, and in support of the mutual recognition arrangement with the United Kingdom. PAC members provided advocate videos, participated in resolutions webinars, and spoke as advocates at the NCARB June 2022 Annual Business Meeting.
- The committee reviewed older resolutions related to ARE and general policies to determine relevance with today's NCARB policies, positions, and practices.
- The PAC reviewed all FY22 proposed resolutions to provide insight related to impact and consistency with NCARB policies and programs.

# PROFESSIONAL CONDUCT COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: John Cothron

Mississippi Member Board Executive

Nathan Baker

AIA, NCARB

Oklahoma Member Board Member

Cathyann C. Gogue

Guam Member Board Member

Scott E. Harm

NCARB, AIA

Washington Member Board Member

Robert Lopez

RA, AIA, NCARB

New York Member Board Executive

Tari Rayala

Minnesota Member Board Member

Joyce Smith

CPA, CGMA

Texas Member Board Member

Marcus Thomas

AIA, NOMA, NCARB

Janet L. Hansen

NCARB, LEED AP

Board Liaison

Vanessa Williamson

CAE

Staff Liaison

#### **Committee Purpose**

The purpose of the Professional Conduct Committee (PCC) is to oversee the development, application, assessment, and adjudication of Council policies relating to the professional conduct of Council Record holders and others using Council services.

#### Highlights

- The PCC reviewed disciplinary matters, or "cases," on a monthly basis. The PCC worked with input from legal counsel to determine appropriate disciplinary sanctions, if any, for over 30 cases.
- The PCC provided recommendations for language updates for the NCARB Certification Guidelines to align language related to the Professional Conduct Committee: Rules of Procedure with updates to the Certification Guidelines.
- The PCC conducted an overview of the PCC presentation at the March 2022 Member Board Executives Workshop.

#### Summary of Charges

- The PCC's FY22 charges were to:
  - Review and act on reported sanctions of NCARB Record holders, as appropriate and in accordance with the *Rules of Procedure*.
  - Review conduct/discipline language in NCARB documents and recommend updates for clarification and currency.
  - Provide Member Board education opportunities regarding the PCC and the *Rules of Procedure* and provide educational material regarding *Rules of Procedure* updates.

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## REGIONAL LEADERSHIP COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: Bayliss Ward

Jennifer R. Arbuckle NCARB, AIA, LEED AP Region 1 Chair

Judy Belcher

Region 2 Member Board Executive

Dawne Broadfield

Region 1 Member Board Executive

Melarie Gonzales

Region 6 Member Board Executive

Lenora A. Isom AIA, NCARB, LEED AP

Region 5 Chair

Stacy Krumwiede Region 5 Member Board Executive

Glenda Loving

Region 4 Member Board Executive

George H. Miller

Region 2 Chair

Jenny Owen

Region 3 Member Board Executive

Margaret (Meg) S. Parsons

FAIA, NCARB, LEED AP BD+C, ALEP

Region 4 Chair

Miguel A. Rodriguez

FAIA, NCARB Region 3 Chair

Tara Rothwell

AIA, NCARB, LEED AP

Region 6 Chair

Joshua Batkin

Staff Liaison

Caitlin Stromberg

Staff Liaison

#### **Committee Purpose**

The Regional Leadership Committee addresses issues specific to the regions of the Council, plans the spring Regional Summit, and provides input into the planning and development of additional membership engagement efforts.

This committee also reviews each resolution submitted by regions and Member Boards for conformity with the Council *Bylaws* and may recommend to the author of any resolution such changes as are deemed advisable for the purpose of clarity and to avoid duplication.

#### Highlights

- The committee was charged with exploring options for gaining greater visibility into Board actions as leadership development opportunities and developed several engagements throughout the year, including an engagement with the Board of Directors and an event during the Annual Business Meeting.
- The committee planned and led the annual Regional Summit—the first summit held with an in-person option since 2020.

# SPECIAL INITIATIVES

In addition to its standing committees, NCARB's leadership creates other volunteer groups to explore current issues and evaluate emerging trends as necessary. These groups—whose work can span anywhere between a single year and several—take on topics ranging from exploring the future of the profession to providing suggestions on the path to licensure.

# DIVERSITY COLLABORATIVE TASK FORCE



#### **COLLABORATIVE MEMBERS**

Chair: Celestia Carson

AIA. LEED AP

Utah Member Board Member

Jennifer R. Arbuckle

NCARB, AIA, LEED AP

Lenora A. Isom

AIA, NCARB, LEED AP

Nebraska Member Board Member

Nolanda Hatcher

Alabama Member Board Member

Latoya Kamdang

AIA

New York Member Board Member

George H. Miller

FAIA

New York Member Board Member

Kathleen (Kate) R. Nosbisch

Hon. AIA VA

Virginia Member Board Executive

Margaret (Meg) S. Parsons

FAIA, NCARB, LEED AP BD+C, ALEP

Minnesota Member Board Member

Miguel A. Rodriguez

FAIA, NCARB

Florida Member Board Member

Tara Rothwell

AIA, NCARB, LEED AP

New Mexico Member Board Member

Nilza Serrano

California Member Board Member

Aelan Tierney

AIA, LEED AP BD+C

Massachusetts Member Board Member

Cathe Evans

Board Liaison

Philip M. Leinbach

NCARB, AIA, REFP, CSI

Board Liaison

Caitlin Stromberg

Staff Liaison

#### **Collaborative Purpose**

The Diversity Collaborative Task Force explores research and recommends strategies to increase the diversity of NCARB regional and national leadership to ensure that the organization fully represents the diversity of the population it serves.

#### Highlights

During FY22, the Diversity Collaborative:

- Held blue-sky discussions on DEI with the Education, Experience, and Examination committees at NCARB's Committee Summit, identifying opportunities for NCARB to continue to investigate how the organization can go further in developing programs that provide equitable paths to licensure.
- Supported a series of listening sessions, inviting Member Board Members to share their perspectives and experiences related to DEI at NCARB.
- Developed and advocated for a resolution to amend the *NCARB Bylaws*, adding the Diversity Collaborative as a standing committee called the Diversity, Equity, and Inclusion Committee. This resolution was passed at the June Annual Business Meeting.

## ETHICS WORK GROUP



#### **WORK GROUP MEMBERS**

Chair: Jorge Calderón López

AIA Fsa

Puerto Rico Member Board Member

Larry W. Bishop

NCARB

Mississippi Member Board Member

Ann M. Borys

Ph.D., AIA

Robert (Bob) A. Boynton

FAL

Philip H. Cerrone III

AIA, NCARB

Connecticut Member Board Member

Paul D. Edmeades

RA, AIA, NCARB

Maryland Member Board Member

M. Bradley Gaskins

AIA, CASp, NCARB

Oklahoma Member Board Member

Elizabeth A. Glasgow

AIA NCAR

Oklahoma Member Board Member

Mary McClenaghan

AIA, NCARB

Pennsylvania Member Board Member

Susan B. McClymonds

FAIA, CSI, CSS, SCIP, NCARB

David Schulz

AIA, PP, AUA

New Jersey Member Board Member

R.K. Stewart

FAIA, NCARB, Hon. FRAIC, Hon. JIA

Jeremy Fretts

AIA, NCARB, M.A. Ed.

Staff Liaison

#### **Work Group Purpose**

The Ethics Work Group drives critical review and innovative thinking about the role of the Council and its Member Boards in developing programs and resources to advance education and maintain high standards in professional ethics among architects.

#### Highlights

- Work group members conducted independent research on ethics requirements in other professions, as well
  as a review of ethics education in architecture programs and ethics requirements in jurisdictions. Based on
  this research and the ensuing discussion, the work group developed recommendations for consideration by
  the Council.
- Key examples from their recommendations include:
  - Developing a recommended rubric for ethics education
  - Encouraging jurisdictions to publish annual reports of disciplinary action formatted in a way that could be utilized for education and awareness
  - Expanding the NCARB Model Rules of Conduct to include several additional items from the AIA Code of Ethics.
- The work group recommended against requiring a separate ethics-specific CE requirement for Certificate renewal or in NCARB's *Model Law and Regulations*.

# FUTURES COLLABORATIVE



#### **COLLABORATIVE MEMBERS**

Chair: Rick Storvick

Washington Member Board Executive

Kingkini Arend RA, AIA, NCARB

Ronald B. Blitch

FAIA, FACHA, NCARB

Louisiana Member Board Executive

Wyly Brown

AIA, NCARB

Tian A. Feng

FAIA, FCSI

California Member Board Member

Guillermo Ortiz de Zárate

Dena Prastos

AIA, NCARB

Douglas W. Sams

AIA, LEED AP BD+C

**Alastair Stokes** 

AIA, NCARB

Richard H. McNeel

 $\mathsf{NCARB}, \mathsf{AIA}, \mathsf{LEED} \; \mathsf{AP}$ 

Mississippi Member Board Member

Andrew McIntyre

Staff Liaison

Patricia N. Ramallo

AIA, NCARB, CAE, LEED AP BD+C & Homes

Staff Liaison

#### **Collaborative Purpose**

The Futures Collaborative monitors and researches changes in the regulatory environment and the practice of architecture. Efforts will guide the ongoing development of forecasts of possible future outcomes, as well as inform strategic conversations across the Council.

#### Report

Highlights

• In FY22, the collaborative engaged with multiple subject matter experts to explore a range of future-focused topics, including the interconnectivity between technology and sustainability, progression of computational design, the automation of code compliance, and issues related to climate adaptation.

# INCIDENTAL PRACTICE TASK FORCE



#### **TASK FORCE MEMBERS**

Chair: Wendy Ornelas

FAIA

Kansas Member Board Member

Terry L. Allers

FAIA, NCARB, Hon. FCARM

David H. Barkin

FAIA, NCARB

Connecticut Member Board Member

Mark Glenn

New Mexico Member Board Member

Julie Hildebrand

Texas Member Board Executive

Stephanie McCrery

CIDQ, KYCID

Kentucky Member Board Member

Philip J. Meyer

Mary M. Morissette

FAIA, NCARB, LEED AP

Colorado Member Board Member

James C. Rearden

AIA, CSI, NCARB

Missouri Member Board Member

Dean Ringle

Rachelle Schoessler Lynn

FASID, CID, LEED Fellow

**Kevin Sneed** 

FAIA, NCARB, LEED AP BD+C Maryland Member Board Member

Jon D. Wilbeck

Nebraska Member Board Executive

John Patrick Rademacher

AIA, NCARB

Ohio Member Board Member, Board Liaison

Joshua Batkin

Staff Liaison

Maurice Brown

Staff Liaison

#### **Task Force Purpose**

The Incidental Practice Task Force (originally established in FY2I) explored the various approaches to incidental practice used by architect, engineer, interior design, and landscape architect licensing boards. Its purpose was to research the areas of commonality and what defines each of the professions that are a part of the built environment. Each design profession, in some respect, overlaps with another profession's work.

#### Highlights and Summary of Charges

- The task force compiled and discussed the advantages and disadvantages of approaches to incidental practice found in each state and territory's architecture practice act as well as national regulatory organizations' model laws and rules.
- Reviewed research and analysis from NCARB's legal counsel, which determined there are few commonalities or uniform elements among the architecture practice acts. They found no standard approach to regulating incidental practice.
- Provided the NCARB Board of Directors with a recommendation report suggesting a framework for a larger ICOR effort involving equal representation from the related design disciplines to develop a clear and shared definition, guidelines, and/or best practices that professional licensing authorities can use to regulate the overlap of practice more effectively.

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## LICENSURE ADVISORY FORUM



#### **FORUM MEMBERS**

Chair: Robert M. Calvani

FAIA, NCARB

New Mexico Member Board Member

Zaida Basora

Scott Cornelius AIAS, CSI-S, Assoc. AIA

Theodore Edaakie

Saif Haq

Kelly Hayes McAlonie

Melvalean McLemore AIA, NOMA, LEED AP Penny Nelson

CDFA

Russell Peterson

Octavio Santurio

Carl Sergio

**Joshua Batkin** Staff Liaison

Maurice Brown
Staff Liaison

#### **Forum Purpose**

The Licensure Advisory Forum was a diverse group of engaged external partners who provided feedback to the Council programs and initiatives. Its purpose was to provide perspectives to NCARB outside of its own membership and identify opportunities and challenges regarding the path to licensure.

#### Highlights

- Forum members exchanged updates and best practices from their respective organizations' DEI-related initiatives and learned more about the Diversity Collaborative's work.
- Discussed barriers to prospective architecture students with the Education Committee.
- Examined the strengths and weaknesses of each licensure program with the Examination Committee.
- Learned more about NCARB's Analysis of Practice initiative and how the Licensure Advisory Forum members could support the initiative by reaching out to promote participation among their members.

#### Summary of Charges

- Each member shared their organization's efforts to support licensure candidates and promote licensure and reciprocity.
- Provided feedback on various NCARB programs and special initiatives.

# RESPONSIBLE CHARGE TASK FORCE



#### **TASK FORCE MEMBERS**

Chair: David L. Hoffman FAIA, NCARB, Hon. FCARM

Philip H. Cerrone III

AIA, NCARB

Connecticut Member Board Member

Beth Chenette

Vermont Member Board Member

Debra Dockery

FAIA, NCARB

Texas Member Board Member

Gregory L. Erny

FAIA, NCARB

Nevada Member Board Member

Monica Harrison

Nevada Member Board Executive

Susan Schaefer Kliman

Ph.D., AIA, NCARB, LEED AP

Robert Larrimer

AIA. LEED AP

Ohio Member Board Member

Thomas D. Lonardo

RA. NCARB

Rhode Island Member Board Member

Anne Muller

Kentucky Member Board Member

John Pesa

AIA, NCARB, MBA

Massachusetts Member Board Member

Rick D. Thompson

AIA, NCARB

Tennessee Member Board Member

Jon Alan Baker

FAIA, NCARB, LEED AP

Board Liaison

Jared Zurn

Staff Liaison

#### **Task Force Purpose**

The Responsible Charge Task Force was established to research the potential need for updating and refining the current model law definition of "responsible charge." As architectural services continue to be delivered in a variety of ways within a wide range of firm sizes with diverse project complexities, the previous definition created potentially unrealistic expectations for the architect in responsible control. The task force's purpose was to research how current practice is being conducted safely and effectively and, if appropriate, recommend updated model law language that more accurately addresses the variety of ways in which responsible control can be maintained.

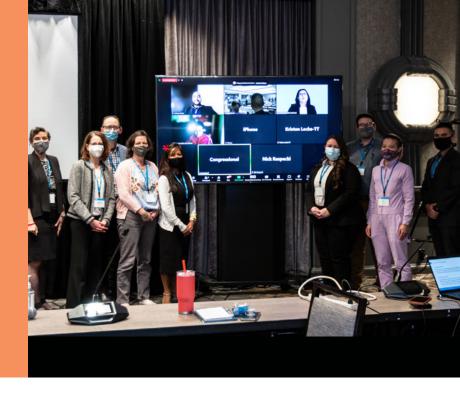
#### Highlights

- Efforts during this fiscal year were built on research completed in FY21 on jurisdictional rules and regulations. In addition, the task force met with representatives from the insurance industry and professional arbitrators that adjudicate architectural claims. Findings from the research showed that although jurisdictions do vary in how they define responsible charge/control, from a claims perspective, the insurance industry is more concerned with the overall quality assurance processes that exist within an office for technical submission preparation than with the procedural aspects a practitioner may use in applying a seal and signature.
- Jurisdictional licensing requirements continue to reinforce the importance of the role of the "Architect of Record" as the individual taking professional responsibility for all work under their seal. The Responsible Charge Task Force agreed that this responsibility is paramount to the role of the architect as protector of the public interest and that of the client.
- A survey of practitioners was completed, and results showed that the role the licensed architect serves in a small firm compared to a large firm may vary. However, core aspects of responsibility including ensuring a design complies with building codes remained critical in all firm settings. Other aspects of work such as the development of project specifications and incorporation of building systems were found to be more directly controlled by architects in small firms while large firm practitioners delegated this work to other specialists. Even when delegation occurred, results showed the architect understood their responsibility for reviewing completeness and accuracy while integrating the work of others.
- In the end, the task force recommended updates to the current NCARB Model Law & Regulations definition including the change of the term to "responsible control." The recommendation was made to the NCARB Board of Directors, which accepted and moved a resolution to the membership for consideration. The resolution was voted on by the membership at the FY22 Annual Business Meeting and overwhelmingly adopted.

#### Summary of Charges

- The task force had three main charges:
  - Conduct research on current practice.
  - Propose Model Law updates to reflect current safe practice.
  - Develop an educational outline that can be used to inform practitioners on their role and responsibilities when sealing and signing technical submissions.
- The task force developed an educational outline and criteria for a variety of delivery methods to
  communicate to practitioners their responsibilities to maintain responsible control over all projects under
  their seal. The proposed educational courses will reinforce the important role the sealing architect must play
  in ensuring a safe and well-coordinated solution that may incorporate the work of others.

### RE-THINK TANK



#### **RE-THINK TANK MEMBERS**

Tatyana Aksamentova AIA, LEED Green Assoc.

Bryce Bounds

AIA

A. L. Hu

NOMA, NCARB, AIA

Bhawya Joshi AIA, NCARB

Michael Perez

Andrew Portis
AIA, NOMA, NCARB

Jaime Rasmussen AIA, LEED AP, GGP

Paul Rathjen

Rebecca Ruppert

AIA, NCARB

Sarah Thomson

NCARB

David Woshinsky

AIA

Joette Yago

AIA, NCARB

Michelle Cohn

AIA, NCARB, LEED AP, PMP

Staff Liaison

Patricia N. Ramallo

AIA, NCARB, CAE, LEED AP BD+C & Homes

Staff Liaison

#### **Re-Think Tank Purpose**

Each year, NCARB selects a group of 12 recently licensed architects from around the country to be a part of the Re-Think Tank. Members have the opportunity to shape the future of licensure by sharing their feedback and ideas as part of the think tank for recently licensed architects.

#### Highlights

- Through in-person and virtual meetings, Re-Think Tank members:
  - Explored pros and cons of the current licensure model.
  - Examined the current state of architectural practice, including COVID-19's influence on the profession.
  - Brainstormed solutions to address licensure disparities, including equity, diversity, and inclusion initiatives, and candidate access to education, experience, and examination.
  - Provided feedback on current programs and resources.
  - Identified the most challenging areas of practice post-licensure.
- At the 2021 Committee Summit, the Re-Think Tank, together with the Think Tank, engaged with the
  Education, Experience and Examination Committees, as well as the Licensure Advisory Forum, Futures
  Collaborative, Responsible Charge Task Force, Diversity Collaborative, and NCARB leadership. Through these
  engagements, Re-Think Tank members learned more about how NCARB's programs are developed and
  provided essential insight into pinch points along the path to licensure, opportunities for increasing inclusion
  in the profession, and more.

## TEST PREP PROVIDER REVIEW COMMITTEE



#### **COMMITTEE MEMBERS**

Chair: Anne Smith

FAIA, NCARB

Georgia Member Board Member

Courtney Chin

NCARB

Martha Green

Caitlin Whitley Hayes

AIA, NCARB

Denis Henmi

FAIA, LEED AP, NCARB

Nea Maloo

AIA, NCARB, LEED AP, ICC

Kevin Minster

Michael (Mike) Popp

AIA. CS

Missouri Member Board Member

Carol Sakata

Jimmy Seay Jr.

AIA, NCARB, LEED AP

Alabama Member Board Member

Terance B. White

AIA, NCARB

Vanessa Williamson

CAE Staff Liaison

#### **Committee Purpose**

The Test Prep Review Committee reviews test prep materials submitted to NCARB under NCARB's Approved Test Prep Provider Program. The cadre of diverse, architect volunteers conduct in-depth reviews of submitted materials. Approved materials are listed on NCARB's website as a resource to assist the ARE candidate community as they consider test prep materials as part of their preparation efforts for the ARE.

#### Report

Highlights

- The committee reviewed ARE test prep material submissions.
- The Approved Test Prep Provider Program was sunset in July 2022, as part of NCARB's efforts to evolve support for ARE candidates and transition to focusing on in-house resource development.

### **THINK TANK**



#### **THINK TANK MEMBERS**

Cyrus Dahmubed

**Tihomir Dimitrov** 

Maureen Fery

Catherine Hernandez

Assoc. AIA, NOMA

Kelsey Kaiser

Yan Li

RA, LEED AP BD+C

Kristen Locke

Assoc. AIA

**Emily Matis** 

Assoc. AIA

Davielle Phillips Assoc. AIA, MBA

Ana Maria Reyes

Assoc. AIA

Leopoldo Robledo Jr.

AIA, NCARB, LEED AP

Linda Williams

Martin Smith

AIA, NCARB

Staff Liaison

Samantha Miller

Staff Liaison

#### **Think Tank Purpose**

For nearly a decade, NCARB has invited emerging professionals from around the country to share feedback on licensure programs, brainstorm areas for improvement, and engage with NCARB leadership. Many alumni members go on to volunteer for our standing committees, task forces, and even state licensing boards.

#### Highlights

- Think Tank members identified the most successful and challenging elements of the licensure process and brainstormed solutions to common pinch points.
- Members also recommended resources to strengthen outreach to college students at non-accredited architecture programs.
- Additionally, the Think Tank explored the meaning of competency and recommended new approaches to measure competency among licensure candidates—a common theme across NCARB's volunteer groups during FY22.
- Members also suggested improvements to NCARB's programs and resources for licensure candidates.

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# COMMITTEE SUMMIT



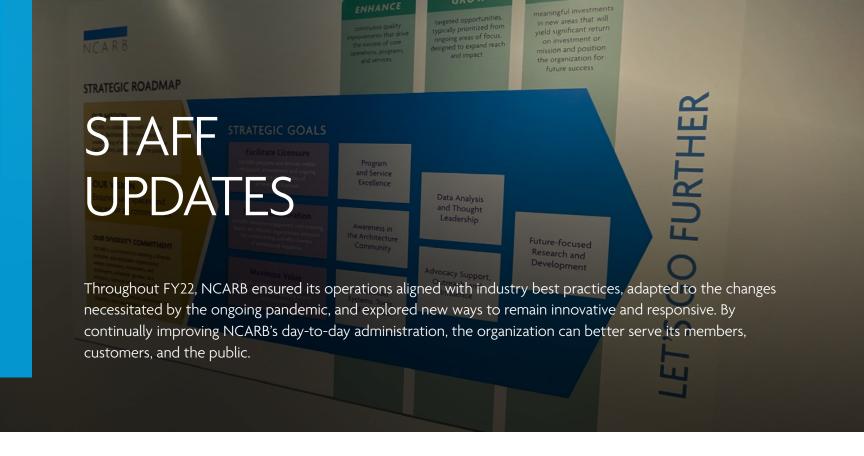
Each year, hundreds of volunteers—including licensure candidates, architects, educators, and other professionals—help NCARB develop and maintain its major programs and initiatives. In early December 2021, NCARB volunteers gathered in Washington, DC, for the organization's annual Committee Summit.

Each of NCARB's volunteer groups focuses on a different aspect of the organization's work—from candidate-focused programs like the ARE to internal items like NCARB's policy and governance documents. The annual Committee Summit is designed to give volunteers the opportunity to see how their work aligns with the rest of NCARB's efforts, providing a holistic understanding of each program or project.

During this year's summit, members of various committees focused on engaging in joint sessions and exploring how their charges relate to each other. In addition, alumni members of NCARB's Think Tank of licensure candidates and Re-Think Tank of recently licensed architects met with other volunteer groups to see how their previous efforts impacted NCARB's ongoing work.

## BUSINESS OPERATIONS

Explore the Council's structure, financials, and day-to-day administration—plus find information about NCARB's Innovation and Data & Analytics teams, continued focus on data security, staff operations amid the COVID-19 pandemic, and the Organizational Health team's initiatives.



#### **ORGANIZATIONAL HEALTH TEAM**

NCARB's Organizational Health team was established in FY20. In FY22, the department worked to strengthen NCARB's organizational culture, providing frequent opportunities for shared learning and personal development. During the year, the team:

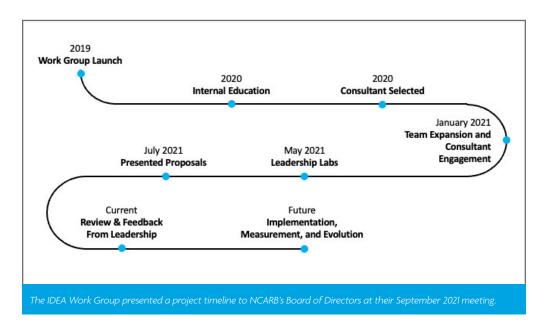
- Continued a bi-monthly newsletter for NCARB staff featuring project updates, coaching tips, and more
- Worked with guest speakers to conduct helpful workshops for staff on a variety of topics, from stress reduction to financial wellbeing
- Launched a leadership development training program
- Provided support for NCARB's all-staff employee engagement activities
- Supported the IDEA work group and its efforts to engage with colleagues on DEI-related holidays and various cultural and religious celebrations.
- Regularly celebrated project team accomplishments



The Organizational Health team will continue to evolve over the coming fiscal year.

#### **IDEA WORK GROUP**

The Inclusion/Diversity/
Equity/Agility (IDEA) work
group was formed in
2019 to address inclusion,
diversity, equity, and agility
(IDEA) within NCARB
culture. The work group's
initial efforts included
a campaign to create a
shared understanding of
DEI definitions, as well as
themed DEI conversations
to increase employees'
familiarity and comfort
levels with these topics.



In FY21, the IDEA work group expanded to more than double its original size and began working alongside a DEI consultant. With the consultant's support, the work group was able to hold two leadership labs with NCARB leadership and deliver various work products and suggestions to the CEO.

The IDEA work group continued its efforts in FY22 to educate NCARB employees and leadership on DEI, provide opportunities for meaningful discussion, and make strides for a more inclusive organization.

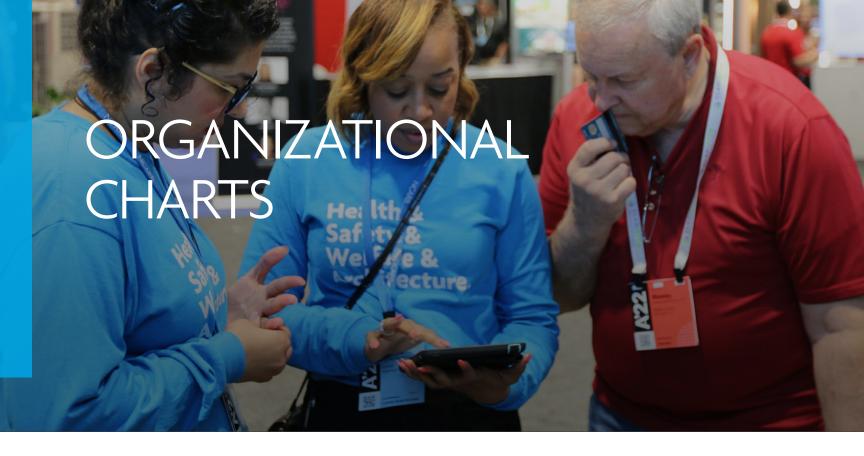
#### **STAFF OPERATIONS**

In March 2020, NCARB staff began working remotely due to the onset of the COVID-19 pandemic. This continued through FY21 and the majority of FY22, as NCARB leadership continually re-evaluated return-to-office plans in light of evolving information and guidance from the Centers for Disease Control and Prevention (CDC). In May 2022, the organization welcomed staff back to the office on a hybrid schedule, with staff members working from the Washington, DC, office four days per two-week pay period. With careful safety measures in place regarding room capacity, vaccination, testing, and masking, this return-to-work plan ensured NCARB could resume in-person collaboration while protecting employee health and safety.

#### **ENHANCED CYBERSECURITY**

With staff working both in person and remotely, NCARB's Information Systems team collaborated across the organization to release updates that would improve the security of NCARB's systems and customer data. These enhancements ensure that staff have the resources and support needed to serve members and customers, without compromising sensitive information. Some new resources and updates from FY22 include:

- Worked with a vendor to minimize risk of ransomware
- Updated systems and hardened cyber protection at NCARB's data center
- Continued focus on remote work protection and visibility
- Execution of "best practices" audit to address risk mitigation, business continuity, and compliance

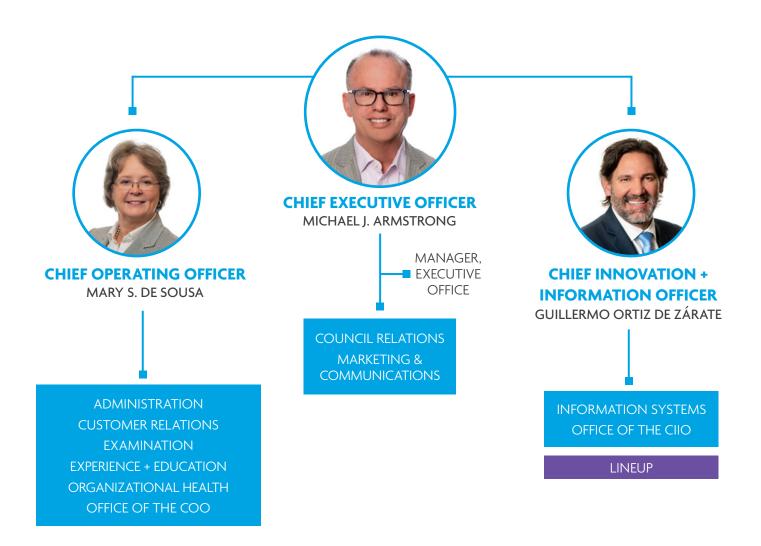


The following pages visually summarize NCARB's organizational structure and provide background information about the various teams that make up the Council, as well as NCARB's for-profit subsidiary, Lineup:

- Executive Office
- Administration
- Customer Relations
- Council Relations
- Examination
- Experience + Education
- Information Systems
- Marketing & Communications
- Office of the Chief Operating Officer
- Office of the Chief Information + Innovation Officer
- Organizational Health
- Lineup

## **EXECUTIVE OFFICE**

Headquartered in Washington, DC, NCARB has approximately 120 employees who work to provide the best possible service to our Member Boards and customers. The staff, consisting of experts in architecture as well as other fields, is divided into several departments that provide a wealth of diverse experiences and skill sets to the organization.



National Council of Architectural Registration Boards detailed organizational structure as of June 2022

# ADMINISTRATION

The Administration team manages NCARB's finances and human resources, and plans NCARB meetings, including the Annual Business Meeting.

## CHIEF OPERATING OFFICER MARY S. DE SOUSA



• Adminstrative Assistant

#### **MEETING PLANNING**

- Senior Manager, Meetings + Events
  - Manager, Meetings + Events

## DOUG MORGAN VICE PRESIDENT, ADMINISTRATION



ROBERT DICKINSON, CPA Assistant Vice President, Finance

- Assistant Controller
  - Senior Accountant
  - Accountants



MARGOT SIMMONS
Assistant
Vice President,
Human Resources

- Senior HR Generalist
- HR Generalist

# CUSTOMER RELATIONS

The Customer Relations team is the first line of contact for questions and concerns, giving outstanding service to students, licensure candidates, architects, and Member Boards for all our services.

### CHIEF OPERATING OFFICER MARY S. DE SOUSA



• Adminstrative Assistant

## ROXANNE ALSTON VICE PRESIDENT, CUSTOMER RELATIONS



CASANDRA WALKER
Assistant
Vice President,
Customer Relations

- Managers,
   Customer Relations
  - Senior Specialists
  - Program Specialists
  - O Specialists 2
  - O Specialists 1



**KATRINA HUMPHREY**Assistant
Vice President,
Customer Relations

- Managers,
   Customer Relations
  - Senior Specialists
  - Program Specialists
  - O Specialists 2
  - O Specialists 1

## COUNCIL RELATIONS

The Council Relations team collaborates with and supports the Member Board Executives Committee and works with NCARB's Member Board Members to help implement national programs, advocate for reasonable regulation, and maintain our collateral relationships.

## CHIEF EXECUTIVE OFFICER MICHAEL J. ARMSTRONG



## JOSHUA C. BATKIN VICE PRESIDENT, COUNCIL RELATIONS



MAURICE BROWN
Assistant Vice President,
Advocacy + External
Engagement

- Manager, External Engagement
- Program Specialist, Advocacy & Engagement



Assistant Vice
President,
Member Relations and
Volunteer Engagement

- Manager, Member Relations
- Council Relations Coordinator

## EXAMINATION

The Examination team focuses on advancing and improving the Architect Registration Examination (ARE), and ensuring transparency in information relating to the examination.

## CHIEF OPERATING OFFICER MARY S. DE SOUSA



## JARED ZURN, AIA, NCARB, CAE VICE PRESIDENT, EXAMINATION



MICHELLE COHN,
AIA, NCARB, LEED AP BD+C, PMP
Assistant Vice President,
Examination



JOAN PAROS, MBA Assistant Vice President, Examination

- Senior Manager, Examination
  - Program Specialist

Test Development Coordinators

• Managers, Examination

# EXPERIENCE + EDUCATION

The Experience + Education team develops and maintains the Architectural Experience Program (AXP), which guides licensure candidates through the process of gaining architecture experience. They also work with universities to ensure architectural degree programs meet the criteria needed to ensure students are equipped with the knowledge needed to move forward in becoming an architect.

### CHIEF OPERATING OFFICER MARY S. DE SOUSA



• Senior Manager, E+E

HARRY M. FALCONER, JR.,
FAIA, NCARB, HOND, HON. FCARM
VICE PRESIDENT, EXPERIENCE + EDUCATION



MARTIN SMITH,
AIA, NCARB, LEED GREEN ASSOC.
Assistant Vice President,
Experience + Education

• Outreach Manager, E+E



JEREMY FRETTS, AIA, NCARB Assistant Vice President, Experience + Education

• Manager, E+E

O Program Specialist, E+E

# INFORMATION SYSTEMS

The Information Systems team leads the modernization of our technology including My NCARB, NCARB's line of business applications, infrastructure, and help desk.

CHIEF INNOVATION + INFORMATION OFFICER
GUILLERMO ORTIZ DE ZÁRATE



## ROUEL DE GUZMAN VICE PRESIDENT, INFORMATION SYSTEMS



PARISA ILCHI-BRADLEY
Assistant Vice President,
Product Management

- Senior UX Designer
  - UX Designer
- Quality Assurance Analyst II
- Administrative Assistant



**KUNLE OLOW OYEYE**Assistant Vice President,
Information Systems

- Senior Principle Software Engineer
  - O Principal Software Engineer
  - Senior Software Engineers
  - Lead Software Engineer
  - Software Engineer
- Systems Operation Manager
- Lead Software Engineer

# MARKETING & COMMUNICATIONS

The Marketing & Communications team gets the word out about NCARB's initiatives, program updates, and news, and develops marketing materials, videos, website content, and social media campaigns.

### CHIEF EXECUTIVE OFFICER MIKE ARMSTRONG



## ANDREW MCINTYRE VICE PRESIDENT, MARKETING & COMMUNICATIONS



AMANDA PICA
Assistant Vice President,
Marketing &
Communications

- Manager, Content Strategy
  - Content Producers
- Senior Digital Marketer
- Public Relations Specialist
- Senior Visual Designer
- Visual Designer

# OFFICE OF THE CHIEF OPERATING OFFICER

The Office of the Chief Operating Officer facilitates the work of the NCARB Board of Directors and ensures the continuous improvement of NCARB's existing programs and services.



MARY S. DE SOUSA

CHIEF OPERATING OFFICER

#### **VACANT**

Assistant Vice President, Continuous Improvement

• Business Analysts



VANESSA
WILLIAMSON, CAE
Assistant Vice President,
Executive Office

# OFFICE OF THE CHIEF INNOVATION + INFORMATION OFFICER

The Office of the Chief Innovation + Information Officer explores new areas for experimentation, innovation, and exploration for the Council, including efforts related to data and analytics.



## GUILLERMO ORTIZ DE ZÁRATE CHIEF INNOVATION + INFORMATION OFFICER



**KATHERINE MATTHEWS**Assistant Vice President,
Data & Analytics

• Data & Analytics



PATRICIA RAMALLO Assistant Vice President, Innovation

- Innovation Specialist
- Senior Scrum Master

## ORGANIZATIONAL HEALTH

The Organizational Health team works to improve the collective health of NCARB's employees and the organization by advocating for healthy habits, offering tools and resources, and facilitating training. Their efforts ensure that NCARB is able to provide better service to its members and customers in support of the organization's essential mission.

CHIEF EXECUTIVE OFFICER MICHAEL J. ARMSTRONG

COO, ADMINISTRATION VP, AND CUSTOMER RELATIONS VP







#### **ORGANIZATIONAL HEALTH**



**HEATHER COLES**Assistant Vice President,
Organizational Health

# LINEUP

Established in November 2018, Lineup Management Services, LLC, is a for-profit subsidiary of NCARB created for the purpose of marketing and distributing NCARB's proprietary, volunteer management and team-building software.

## CHIEF INNOVATION + INFORMATION OFFICER GUILLERMO ORTIZ DE ZÁRATE



#### **LINEUP**

#### **BOARD MEMBERS**

- Michael Armstrong
- Philip Leinbach AIA, NCARB, REFP
- Jodi McDermott
- Mark Lowery

#### **STAFF**

- Director of Sales
  - Director, Account Management
  - Lineup, Sales Executive
  - Sales Development Representative
- UX Designer
- Digital Marketer

# BYLAWS

NCARB's organization structure, functions, and processes are governed by the *NCARB Bylaws*. Changes to the *NCARB Bylaws* must be approved by the Member Boards. Several updates were approved by the membership this year.

(Adopted June 23, 1979, Cambridge, MA. Amended June 27, 1981, Maui, HI; June 26, 1982, Minneapolis, MN; June 25, 1983, Philadelphia, PA; June 30, 1984, Portland, OR; June 29, 1985, San Antonio, TX; June 28, 1986, Atlanta, GA; June 27, 1987, Seattle, WA; June 29, 1988, Chicago, IL; June 28, 1989, Boston, MA; June 30, 1990, Washington, DC; June 29, 1991, Denver, CO; June 27, 1992, San Francisco, CA; June 26, 1993, Kansas City, MO; June 25, 1994, Dearborn, MI; June 24, 1995, New Orleans, LA; June 29, 1996, Baltimore, MD; June 28, 1997, Minneapolis, MN; June 27, 1998, San Diego, CA; June 26, 1999, Charleston, SC; June 17, 2000, Chicago, IL; June 23, 2001, Seattle, WA; June 29, 2002, Boston, MA; June 28, 2003, San Antonio, TX; June 26, 2004, Portland, OR; June 25, 2005, Miami, FL; June 24, 2006, Cincinnati, OH; June 23, 2007, Denver, CO; June 28, 2008, Pittsburgh, PA; June 26, 2010, San Francisco, CA; June 25, 2011, Washington, DC; June 23, 2012, Minneapolis, MN; June 22, 2013, San Diego, CA; June 21, 2014, Philadelphia, PA; June 20, 2015, New Orleans, LA; June 18, 2016, Seattle, WA.; June 30, 2018, Detroit, MI; May 14, 2021, Special Vote; June 26, 2021, Los Angeles, CA; June 4, 2022, Austin, TX.)

#### **ARTICLE I—NAME**

The name of this organization shall be the National Council of Architectural Registration Boards.

#### **ARTICLE II—DEFINITIONS**

The following terms shall have the following meanings when used in these Bylaws:

- A. "Advisory Committee" shall mean any committee not having and exercising the authority of the Board of Directors:
- B. "Board Committee" shall mean a committee which is comprised solely of two or more Directors and shall have and exercise the authority of the Board of Directors, to the extent authorized by the Board of Directors and permitted by law;
- "Board of Directors" shall mean the Board of Directors of the National Council of Architectural Registration Boards;
- D. "Committee" shall mean a Board Committee or an Advisory Committee;
- "Council" shall mean the National Council of Architectural Registration Boards;
- F. "Council Record" shall mean a record of the education, training, examination, practice, and character of an individual member of the architectural profession;
- G. "Delegate" shall mean any member of a Member Board in attendance at an Annual Business Meeting or any special meeting of the Council as a representative of such Member Board;
- H. "Director" shall mean a member of the Board of Directors;

- "Elected Officer" shall mean any of the President/Chair of the Board, the First Vice President/President-Elect, the Second Vice President, the Treasurer, and the Secretary;
- J. "Examination" shall mean the Architect Registration Examination® prepared by the Council;
- K. "Executive Director" shall mean a person holding such title at a Member Board or having a comparable position as the primary administrator responsible for overseeing the activities of the Member Board;
- L. "Jurisdiction" shall mean any political subdivision of the United States, including any State, commonwealth, territory, dependency, and the District of Columbia, which has a law regulating the practice of architecture;
- M. "Member Board" is a member of the Council in good standing and shall mean the body legally authorized by a Jurisdiction to certify that an applicant for Registration as an architect is qualified;
- "Public Director" shall mean the individual serving as the Public Director (as that term is described in Article VII of these Bylaws) on the Board of Directors;
- O. "Public Member" shall mean a member of a Member Board who does not hold or have a license in a discipline regulated by such Member Board or in a related design profession;
- P. "Regional Chair" shall mean the chairperson of a Region, as such term is described in Article VI of these Bylaws;
- Q. "Regional Director" shall mean a Director who was nominated to serve on the Board of Directors by a Region;
- R. "Registration" shall mean licensure as an architect by the body legally authorized by a Jurisdiction to grant such licensure
- S. "Remote Meeting" shall mean any Annual Business Meeting or any Special Meeting held by telephone or video conference technology or other electronic communications technology that allows all participants to hear and participate in the proceedings and to vote, pose questions, and make comments.
- T. "Voting Delegate" shall mean a Delegate who is authorized to vote on behalf of a Member Board, as evidenced by a letter of credentials provided by the applicable Member Board.

#### ARTICLE III—PURPOSE

The purpose of the Council shall be to work together as a council of Member Boards to safeguard the health, safety, and welfare of the public and to assist Member Boards in carrying out their duties. Pursuant thereto, the Council shall develop and recommend standards to be required of an applicant for architectural Registration; develop and recommend standards regulating the practice of architecture; provide a process for certifying to Member Boards the qualifications of an architect for Registration; and represent the interests of Member Boards before public and private agencies, provided that the Council shall not purport to represent the interest of a specific Member Board without that Member Board's approval.

#### **ARTICLE IV—MEMBERSHIP**

SECTION 1. <u>Members</u>. The membership of the Council shall be the Member Boards. Membership in the Council shall be attained through acceptance by the Board of Directors. Application shall be made upon forms furnished by the Council. Every Member Board shall annually provide the Council with the names and addresses of its members, a copy of its law relating to the Registration and practice of architecture, a copy of its rules or regulations administering such law, and a roster of all persons registered by the Member Board, and shall pay the annual membership dues. All Member Boards shall have equal rights.

SECTION 2. <u>Removal</u>. If, after written notification from the Board of Directors, a Member Board shall:

- A. fail to pay its dues or other financial obligations to the Council or to its Region, or
- B. refuse Registration or otherwise fail to register architects holding the Council Certificate for the reason that such architects are not the residents of the Member Board's jurisdiction, or
- C. fail to administer the Architect Registration Examination prepared by the Council to all its applicants (other than applicants of whom it does not require a written examination) for Registration,

then the Board of Directors may recommend to the Council that such Member Board be removed from membership in the Council. Following such recommendation, the Council may determine by the affirmative vote of not less than two-thirds of all Member Boards to remove such Member Board or, with respect to non-payment of dues or other financial obligations, waive or modify the Member Board's obligation to pay such amounts due to the Council.

SECTION 3. <u>Reinstatement</u>. A Jurisdiction that has been removed from membership in the Council for reasons of non-payment of dues or other financial obligations shall be automatically reinstated as a Member Board:

 following payment of all financial obligations of membership had the Jurisdiction not been removed (or such lesser amount approved, by a vote of two-thirds of all Member Boards), B. upon being in compliance with all other membership requirements of Article IV, Sections 1 and 2; A Member Board that was removed from the Council for reasons other than failure to pay dues or other financial obligations shall only be reinstated upon the affirmative vote of two-thirds of all Member Boards.

#### ARTICLE V—MEETINGS

SECTION 1. <u>Annual Business Meeting</u>. The Council shall hold an Annual Business Meeting at a time and place as determined by the Board of Directors. Notice of all Annual Business Meetings shall be sent to the chair or equivalent presiding officer and to the Member Board Executive of each Member Board not less than 90 days prior to each such meeting.

SECTION 2. Special Meetings. Special business meetings of the Council may be called by the President/Chair of the Board, with the approval of the Board of Directors, or by a majority of the Member Boards. The Bylaws provisions which govern notice for, and the procedures and conduct of business of, the Annual Business Meeting shall apply to Special Meetings.

SECTION 3. Remote Meetings. The Annual Business Meeting and any Special Meetings may be held as a Remote Meeting. The Bylaws provisions which govern calling and providing notice for, and the procedures and conduct of business of, the Annual Business Meeting or special meetings, as applicable, shall apply to Remote Meetings. Holding a Remote Meeting does not preclude allowing participants to gather in a designated location during such meeting.

SECTION 4. <u>Delegates and Credentials</u>. Each Member Board shall be entitled to be represented at Annual Business Meetings and special meetings of the Council by one or more official delegates who shall be members of that Member Board.

Notwithstanding a Member Board's total number of Delegates, each Member Board shall be represented at each Annual Business Meeting and special meeting of the Council by one Voting Delegate, who shall be entitled to cast the vote of its Member Board and who shall be identified as the Voting Delegate by a letter of credentials from the applicable Member Board. A Member Board may change its Voting Delegate from time to time by issuing a subsequent letter of credentials to the Council. Each Voting Delegate shall have an equal vote on all matters on which all Member Boards are entitled to vote.

SECTION 5. <u>Quorum</u>. A quorum for the transaction of business at the Annual Business Meeting of the Council shall be Voting Delegates representing a majority of the Member Boards.

SECTION 6. Resolutions and Other Motions. Resolutions are the substantive matters placed on the agenda for a meeting of the Council in accordance with this Section. All resolutions to be considered at any meeting of the Council, except those submitted by the Board of Directors, those submitted by Select Committees and those of the laudatory type, shall be submitted to the Regional Leadership Committee not later than 75 days prior to the day at the Annual Business Meeting at which the resolution is to be considered. The Regional Leadership Committee shall review each resolution submitted by Regions and Member Boards for conformity with the

Council Bylaws and may recommend to the author of any resolution such changes as are deemed advisable for the purpose of clarity and to avoid duplication. All resolutions shall, insofar as practicable without altering or confusing the intent of the resolution, avoid invective or argument; but the proponent of a resolution may, when submitting the resolution to the Regional Leadership Committee, include a brief summary of the argument in support of the resolution, which summary shall be published with the publication of the resolution. The Council shall distribute all resolutions, except laudatory resolutions, to the Member Boards not less than 30 days prior to the meeting at which the resolution is to be considered. If the Board of Directors discloses its position to the Council, the vote of the Board of Directors shall be disclosed at the same time.

Only Member Boards, Regions, Select Committees, and the Board of Directors may offer resolutions to be presented at any meeting of the Council, or amendments to resolutions so presented. All other motions permitted under Robert's Rules of Order Newly Revised may be made by any Delegate or Director.

SECTION 7. <u>Voting</u>. The affirmative vote of two-thirds of all Member Boards is required to pass any amendment to these Bylaws, to remove any Member Board from membership in the Council, or as provided in Article IV, Section 3. The affirmative vote of a majority of all Member Boards is required to pass any other resolution. Except as otherwise specified in these Bylaws, voting upon all other issues shall require the quantum of vote set forth in Robert's Rules of Order Newly Revised.

Except as expressly permitted by these Bylaws, there shall be no voting by proxy.

SECTION 8. <u>Order of Business</u>. An agenda outlining the order of business shall be prepared for all Council meetings. The agenda shall be prepared under the direction of the Board of Directors and sent by the Secretary to all Member Boards at least 30 days before the date set for a particular meeting.

SECTION 9. <u>Rules of Order</u>. The Council shall be governed by Robert's Rules of Order Newly Revised when not in conflict with: first, applicable laws, then, the Articles of Incorporation, and lastly the Bylaws of the Council.

SECTION 10. <u>Advisory Votes by Letter or Electronic Ballot</u>. The Board of Directors may from time to time submit any issue or question to the Member Boards for an advisory vote by letter or electronic ballot, provided the subject matter and the ballot shall have been officially submitted in writing to the Member Boards at least 60 days prior to a date therein set for final receipt of ballots. Only ballots returned in the prescribed time will be counted.

SECTION 11. Other Participants. Council Directors, Delegates, Member Board Executives or Attorneys when designated by their Member Boards, persons designated by the Board of Directors, and persons designated by the Presiding Officer shall have the privilege of the floor at Council meetings and may take part in the discussions and perform all functions of the Delegates except to vote, or, except as provided in Article V, Section 5, with respect to Directors, to initiate action.

SECTION 12. <u>International Agreements</u>. All written international and/or foreign agreements entered into by the Council shall be subject to ratification by majority vote of the members at an Annual Business Meeting.

#### ARTICLE VI—REGIONS

SECTION 1. <u>Purpose</u>. In order to foster closer communication between Member Boards and the Council, as well as among Member Boards, and further to foster the development of future leaders and assist the Council in achieving its stated purpose, six geographical Regions comprising, in the aggregate, all the Member Boards are hereby established. Each Member Board shall be required to be a member of its Region.

SECTION 2. <u>Membership</u>. The membership of the Regions is established as follows:

REGION 1—New England Conference: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont.

REGION 2—Middle-Atlantic Conference: Delaware, District of Columbia, Maryland, New Jersey, New York, Pennsylvania, Virginia, West Virginia.

REGION 3—Southern Conference: Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, Puerto Rico, South Carolina, Tennessee, Texas, Virgin Islands.

REGION 4—Mid-Central Conference: Illinois, Indiana, Iowa, Kentucky, Michigan, Minnesota, Missouri, Ohio, Wisconsin.

REGION 5—Central States Conference: Kansas, Montana, Nebraska, North Dakota, Oklahoma, South Dakota, Wyoming.

REGION 6—Western Conference: Alaska, Arizona, California, Colorado, Guam, Hawaii, Idaho, Nevada, New Mexico, Northern Mariana Islands, Oregon, Utah, Washington.

#### ARTICLE VII —THE BOARD OF DIRECTORS

SECTION 1. <u>Membership</u>. The Board of Directors shall be comprised of the Elected Officers of the Council, one Regional Director from each Region, the immediate Past President, one Member Board Executive Director, and one Public Director.

SECTION 2. <u>Qualifications and Limitations</u>. The qualifications for serving as a Director shall be as set forth in this Article VII, Section 2, and no entity responsible for nominating any Director shall impose any qualification not set forth herein.

- A. A candidate for election to any Director position shall, at the time such person is nominated:
  - (i) be a citizen of the United States;
  - (ii) have served at least two (2) years as a member of a Member Board; or, in the case of a candidate

- for the position of Member Board Executive Director, have served at least two (2) years as an Executive Director:
- (iii) be a current member of a Member Board; be a past member of a Member Board whose service as a member ended no more than one year before nomination; be an officer of a Region; be an incumbent Director; or, in the case of a candidate for the Member Board Executive Director, be a current Executive Director; and,
- (iv) in the case of candidates who are architects, hold an active NCARB Certificate.
- B. With respect to candidates for a Regional Director position, all qualifications relating to current or past membership in a Member Board or Region must be within the Region from which the candidate is nominated.
- C. If a Member Board regulates professions in addition to the profession of architecture, the candidate will qualify as a member or former member of a Member Board only if the candidate is or was an architect-member or a public member of the architect section of the Member Board.
- D. A candidate for election as the Public Director shall be at the time of nomination a public or consumer member on a Member Board, or have served in such position no more than one (1) year prior to the time of nomination to the Board of Directors.
- E. An individual shall qualify to serve as the President/ Chair of the Board during the one-year period immediately following their term as First Vice President/President-Elect.
- F. An individual shall qualify to serve as the Immediate Past President during the one-year period immediately following their term as President/Chair of the Board.

SECTION 3. Terms of Office and Election. The term of office of a Director shall be one year from the adjournment of the Annual Business Meeting at which they are elected to serve or, in the case of President/Chair of the Board and Immediate Past President, succeeds to office, until the adjournment of the next Annual Business Meeting or until their successor is duly elected and succeeds to office. No person shall serve more than two terms in succession as a Regional Director or three terms in succession as a Member Board Executive Director or Public Director; provided, however, that service as an Elected Officer and Immediate Past President shall not count against such limits. No incumbent shall serve for more than one term in any Elected Officer position or as Immediate Past President; provided, however, that an Elected Officer shall be eligible for reelection for the full term of office if, during the period immediately prior thereto, such Elected Officer had succeeded to or been elected to the office to fill a vacancy.

#### SECTION 4. Removal.

- A. A Director may be removed with cause by a majority vote of the Member Boards at a meeting where a quorum is present, with the meeting notice stating that the purpose, or one of the purposes, of the meeting is the removal of the director.
- Director may be removed with cause by the affirmative vote of two-thirds (2/3) of the Board of Directors.

#### SECTION 5. Nomination and Election of Directors.

- A. Directors shall be nominated as set forth below in this Section 5 of this Article VII. Notwithstanding the various methods of nomination set forth below, all Directors must be elected by a majority vote of the Member Boards at a meeting at which a quorum is present.
- B. Each Region shall select its nominee for Regional Director at a Region meeting. The nominations will be announced by the several Regions prior to and/or at the Annual Business Meeting of the Council.
- C. Any person qualified to serve as an Elected Officer (other than President/Chair of the Board) may be nominated by declaring their candidacy at the Annual Business Meeting by the time determined by the Credentials Committee.
- D. The candidate for Member Board Executive Director shall be nominated by majority vote of the Member Board Executive community comprised of the Executive Director of each Member Board. The nomination will be announced by the community prior to and/or at the Annual Business Meeting of the Council.
- E. Any person qualified to serve as the Public Director may be nominated by declaring their candidacy at the Annual Business Meeting by the time determined by the Credentials Committee.

#### SECTION 6. Vacancies.

A. Vacancies in the office of any Regional Director or Member Board Executive Director shall be filled by an appointee nominated by the Region or the Member Board Executive community respectively and appointed by the Board of Directors to hold office from the time of such appointment until the adjournment of the next Annual Business Meeting. Vacancies in the office of the Public Director and Elected Officers other than First Vice President/ President-Elect and President/Chair of the Board shall be filled by an appointee designated by the Board of Directors to hold office from the time of such appointment until the adjournment of the next Annual Business Meeting. Any such appointee shall meet

- all qualifications applicable to the vacant Director position, as determined by the Credentials Committee.
- B. A vacancy in the office of President/Chair of the Board shall be filled by the First Vice President/President-Elect, who shall serve the remainder of the term as President/Chair of the Board and the following term during which they would have succeeded to the office if not for the vacancy.
- C. A vacancy in the office of First Vice President/
  President-Elect shall be filled by the Second Vice
  President, who shall hold such office of First Vice
  President/President- Elect until the adjournment of
  the next Annual Business Meeting, at which Annual
  Business Meeting the Member Boards shall elect both
  a First Vice President/President-Elect and a President/
  Chair of the Board, each of whom shall be subject to
  the qualifications applicable to candidates for First
  Vice President/President-Elect.
- D. A vacancy in the office of Immediate Past President shall remain vacant.
- E. Any Regional Director who moves their principal residence to a place outside the Region from which they were nominated shall be deemed to have vacated the office of Regional Director, and any Director who ceases to be eligible as provided in this Article VII, Section 2 shall be deemed to have vacated their directorship.

SECTION 7. Duties. The affairs of the Council shall be managed under the authority and direction of the Board of Directors, who shall act by majority vote of the Directors present at a meeting at which there is a quorum, except as otherwise expressly required by these Bylaws or applicable law. It shall exercise all authority, right, and power granted to it by the laws of the State of Iowa and shall perform all duties required by the said laws and by these Bylaws, and, in accordance therewith, it shall not delegate any of the authority, rights, or power or any of the duties imposed on it by these Bylaws or otherwise, unless such delegation is specifically provided for in these Bylaws. All Directors shall serve without compensation; provided, however, that nothing herein shall prohibit the Board of Directors from providing reasonable allowances from time to time to the President/Chair of the Board and to the First Vice President/ President-Elect. Any such allowances shall be included in budget reports furnished to the Member Boards.

SECTION 8. Meetings of the Board. The Board of Directors may meet in any manner allowed by applicable law in regular or special meetings in order to transact business. Unless finances of the Council will not permit, the Board of Directors shall hold a regular meeting immediately prior to the opening of the Annual Business Meeting and a regular meeting immediately following the adjournment of the Annual Business Meeting of the Council. Special meetings may be held upon call of the President/Chair of the Board or the Executive Committee and shall be held upon written request of the majority of the Board of Directors. All Directors shall be given due notice in writing of the time and place of all meetings, although notice of any

meeting may be waived in writing by any Director. A majority of the membership of the Board of Directors shall constitute a quorum for the transaction of business.

#### **ARTICLE VIII—OFFICERS**

SECTION 1. <u>Elected Officers</u>. The Elected Officers of the Council shall be the President/Chair of the Board, the First Vice President/President - Elect, the Second Vice President, the Treasurer, and the Secretary.

SECTION 2. <u>President/Chair of the Board</u>. The President/Chair of the Board shall be the senior Elected Officer of the Council and shall:

- A. preside at all meetings of the Board of Directors, the Executive Committee of the Board of Directors, and the Annual Business Meeting;
- B. present to the Council at the Annual Business Meeting a report of activities during the President/Chair of the Board's term of office;
- C. develop charges for all committees that will serve during their term as President/Chair of the Board and, following approval of the charges by the Board of Directors, oversee the work of all Committees;
- select all members of Committees to serve during their term of office as President/Chair of the Board subject to the terms of Article XII, Section 5;
- E. have the power to make appointments to any unfilled or vacant Committee membership during their term as President/Chair of the Board, subject to the approval of the Board of Directors;
- F. represent the Board of Directors and its policies to all external and internal constituents including to the Chief Executive Officer; and
- G. perform such other duties and powers as the Board of Directors may from time to time decide.

SECTION 3. <u>First Vice President/President-Elect and Second Vice President.</u> The First Vice President/President-Elect and the Second Vice President, in order, shall, in the absence of the President/Chair of the Board, exercise the duties of and possess all the powers of the President/Chair of the Board. In addition, the First Vice President/President-Elect shall:

- A. develop the Committee charges to be completed during their term of office as President/Chair of the Board, subject to the approval of the Board of Directors:
- B. select the Chair of all Committees to serve during their term as President/Chair of the Board, subject to the approval of the Board of Directors; and
- C. select all members of Committees to serve during their term of office as President/Chair of the Board, subject to the approval of the Board of Directors.

#### SECTION 4. Treasurer. The Treasurer shall:

- A. oversee the financial affairs of the Council and be the primary liaison of the Board of Directors with the person designated by the Chief Executive Officer as the chief financial officer of the Council;
- B. report to the Board of Directors and at the Annual Business Meeting on financial matters of the Council; and
- C. perform such duties and have such powers additional to the foregoing as the Board of Directors may designate.

#### SECTION 5. Secretary. The Secretary shall:

- A. record or cause to be recorded all votes, consents, and the proceedings of all meetings of the Council and of the Board of Directors; and
- B. perform such duties as the Board of Directors may designate.

Records of the Council meetings shall be open at all reasonable times to the inspection of any Member Board.

In the absence of the Secretary from any meeting of the Council or from any meeting of the Board of Directors, a temporary Secretary designated by the person presiding at the meeting shall perform the duties of the Secretary.

SECTION 6. <u>Chief Executive Officer</u>. The Chief Executive Officer shall be the senior appointed officer of the Council. Such person shall be appointed by and shall serve at the pleasure of the Board of Directors, and shall have such compensation and benefits as shall be established from time to time by the Board of Directors. The Chief Executive Officer shall have general charge of the management and administration of the Council's affairs, the implementation of policies established from time to time by the Board of Directors and such other duties and powers as the Board of Directors may from time to time determine, subject always to the ultimate authority of the Board of Directors under applicable law and these Bylaws.

SECTION 7. <u>Bonding</u>. The Council's Chief Executive Officer and those in general charge of the Council's financial matters shall be bonded in an amount of not less than \$500,000. The Chief Executive Officer may decide to have others bonded in the Council. The cost of such bond shall be paid from funds of the Council.

## ARTICLE IX—COUNCIL SERVICES TO MEMBERS OF THE ARCHITECTURAL PROFESSION

SECTION 1. <u>Council Record</u>. The Council shall, upon request of individual members of the architectural profession, secure, authenticate, and record factual data of an applicant's education, training, examination, practice, and character for purposes of establishing a Council Record. Upon request of the applicant, this Council Record will be forwarded to any Member Board or to

any foreign Registration authority with whom the Council has an agreement for mutual reciprocity.

SECTION 2. <u>Council Certification</u>. Council Certification shall be given to an Architect holding a Council Record verifying that the Architect has complied with the Council standards of education, training, examination, Registration, and character. In addition to this verification, the Certification shall carry the recommendation of the Council that Registration be granted the Architect without further examination of credentials. For applicants registered as Architects in countries where formal agreements with the Council exist, the standards and procedures for Certification will be in accordance with such written agreements or as otherwise established by the Council. Architects certified by the Council shall have a Certificate incorporated in their Council Record.

SECTION 3. <u>Annual Renewal</u>. Council Certification shall be in effect for a period of one year. Renewal of the Council Certification shall be predicated upon the submission of an annual fee and an annual report containing such information as the Council deems appropriate. The Council Certification shall lapse if the annual fee and report are not received by the Council within such grace period as the Board of Directors may establish. A lapsed Council Certification may be reactivated by paying delinquent renewal fees, furnishing delinquent annual reports, and paying such fee for reinstatement as the Board of Directors may establish from time to time.

SECTION 4. <u>Revocation of Certification</u>. The Council shall revoke an Architect's Council Certification if:

- A. a Member Board has revoked (without limitation as to time) the Architect's Registration for a cause other than nonpayment of renewal fees or failure to file information with the Member Board: or
- B. facts are subsequently revealed which show that the Architect was actually ineligible for Council Certification at the time of Council Certification.

In addition, the Council may revoke an Architect's Council Certification if:

- C. a Member Board or a court makes a finding, not reversed on appeal, that the Architect has, in the conduct of their architectural practice, violated the law or has engaged in conduct involving wanton disregard for the rights of others; or
- the Architect has surrendered or allowed to their Registration to lapse with the Member Board in connection with disciplinary action pending or threatened; or
- E. a Member Board has denied the Architect registration for a cause other than the failure to comply with the educational, experience, age, citizenship, or other technical qualifications for registration in such jurisdiction; or

F. the Architect has willfully misstated a material fact in a formal submission to the Council.

The Council may reinstate a Certification previously revoked, if the cause of the revocation has been removed, corrected, or otherwise remedied.

In order to assist the Council in carrying out its responsibilities under this Section, each Member Board shall (unless prohibited by applicable law) report to the Council the occurrence of any event that qualifies an Architect for revocation of their Council Certification, as described herein.

#### ARTICLE X—COUNCIL SERVICES TO MEMBER BOARDS

SECTION 1. Architect Registration Examination. The Council shall prepare an Examination for use by Member Boards. The Board of Directors shall issue, from time to time, rules respecting the administration and grading of Examinations, which shall include, among other things, the schedule of charges for the use of the Examinations, the date or dates on which Examinations may be administered, safeguards to prevent improper disclosure of information respecting the Examinations, and such other matters respecting the administration and grading of Examinations as the Board of Directors deems appropriate. Every Member Board using the Examination shall comply strictly with the rules issued by the Board of Directors, unless the Board of Directors agrees to waive any of the rules in a particular case. If any Member Board refuses to comply with the rules applicable to its use of the Examination or, after so agreeing, fails to comply with such rules, the Board of Directors may withhold the Examinations from such Member Board until it is satisfied that such Member Board will comply with such rules thereafter. Any Member Board which refuses Registration to architects holding the Council Certification for the reason that the Member Board has requirements or procedures for grading the Examination which are different from the requirements or procedures established by the Council shall be denied the use of the Examinations until such policy of refusing Registration is revoked; but the Board of Directors may, with sufficient cause, waive the denial of the use of the Examinations.

SECTION 2. <u>Architectural Experience Program.</u> The Council shall prepare a structured experience program for use by Member Boards. The Board of Directors shall issue, from time to time, updates to program rules and opportunities to remain relevant with experiences and competencies necessary for the current practice of architecture.

SECTION 3. <u>Additional Services.</u> Additional services may be offered as determined by the Board of Directors from time to time.

SECTION 4. Forms and Documents. In order to ensure uniformity in the reporting of an applicant's education, experience, Registration (if applicable), and other necessary supporting data for determining eligibility for the Examination, Council Certification, or reciprocal Registration, the Council shall study and prepare forms, documents, and/or systems appropriate for use by both the Council and Member Boards.

SECTION 5. <u>Research</u>. The Council, through work of committees, shall engage in research pertinent to all matters relating to legal Registration of architects.

SECTION 6. <u>International Relations</u>. The Council shall engage in the exploration and formulation of agreements with foreign countries to allow architects to practice in countries other than their own.

## ARTICLE XI—FINANCES, FUNDS, ACCOUNTING, INVESTMENTS, AND RECORDS OF THE COUNCIL

SECTION 1. Dues and Fees.

- A. Annual membership dues may be changed for any period, by resolution adopted at an Annual Business Meeting with implementation of any increase to take place not less that three years after such resolution is adopted.
- B. The fees to be charged for services to members of the architectural profession shall be established, from time to time, by an affirmative vote of not less than two-thirds of the Board of Directors present and voting.

#### SECTION 2. Operating Fund.

- A. All membership dues and all fees and other revenues received from any of the activities of the Council shall be placed in the operating fund of the Council. The operating fund shall be administered by the Council's chief financial officer.
- B. As soon as feasible following the Annual Business Meeting, the Board of Directors shall adopt a general budget which shall show the anticipated income and expenditures for the current year.
- C. No, Director, Committee, or employee of the Council shall have the right, authority, or power to expend any money of the Council, to incur any liability for and in its behalf, or to make any commitment which will or may be deemed to bind the Council in any expense or financial liability, unless such expenditure, liability, or commitment has been properly incorporated into the budget, and the Board of Directors has made an appropriation to pay the same.
- D. The Fiscal Year of the Council shall be from July 1 of one year to June 30 of the next succeeding year.

SECTION 3. Securities and Investments. In accordance with the Board of Directors' policies and directions by the Board of Directors to the Chief Executive Officer, the Council's chief financial officer shall have charge of the investment of all funds of the Council not held in its operating fund. In accordance with such policies and such directions, such chief financial officer may sell, purchase, transfer, and convey securities and exercise all rights, by proxy or by participation, of the Council with respect to such securities, or may authorize such purchases, sales, transfers, conveyances, and the exercise of any or all of said rights.

SECTION 4. <u>Liabilities of Officers, Directors, and Employees</u>. No Director, officer, or employee of the Council shall be personally liable for any decrease of the capital, surplus, income, balance, or reserve of any fund or account resulting from their acts performed in good faith and within the scope of their authority.

SECTION 5. <u>Disclosure of Records</u>. Upon written request made with reasonable specificity, a Member Board shall have the right to receive from the Council with reasonable promptness copies of any Council record it may reasonably request, but excluding:

- A. information barred from disclosure by an applicable statute;
- B. trade secrets:
- information disclosed to the Council in reliance upon its continued non-disclosure:
- D. information that, if released, would give an inappropriate advantage to a competitor or bidder with respect to a request for proposals issued or about to be issued by the Council;
- E. personnel information, the disclosure of which would constitute an unwarranted invasion of personal privacy;
- attorney-client communications and attorney work-product materials;
- G. transcripts and personal information respecting Certificate applicants or holders without the permission of such applicant or holder;
- H. contents and results of examinations except to the extent disclosure is provided for in the contract between the Council and the Member Board together with data, methodologies, practices, plans, proposals, records of committee deliberations and other records relating to the content, administration, scoring or security of examinations; and
- I. information arising from investigatory cases.

Any of the excluded records that the Council has already distributed publicly shall, notwithstanding the preceding sentence, be available to any Member Board.

To the extent permitted by applicable law, Council records furnished to a Member Board shall not be distributed by the Member Board other than to members of such Member Board. The Council may charge the Member Board only reasonable costs to comply with the request. Such charges shall be itemized by the Council in an invoice to the Member Board.

#### **ARTICLE XII—COMMITTEES**

SECTION 1. <u>Board Committees</u>. The Board of Directors may, by the affirmative vote of a majority of the Directors then in office or as otherwise set forth in these Bylaws, create one or more Board Committees. Board Committees, to the extent provided in the applicable authorizing action of the Board of Directors or

these Bylaws, shall have and exercise the authority of the Board of Directors in the management of the Council. A Board Committee may not, however:

- A. authorize distributions;
- B. approve or recommend to members dissolution, merger, or the sale, pledge, or transfer of all or substantially all of the Council's assets;
- elect, appoint, or remove Directors or fill vacancies on the Board of Directors or on any Board Committees; or
- D. adopt, amend, or repeal the Council's Articles of Incorporation or Bylaws.

The designation of, and the delegation of authority to, a Board Committee shall not operate to relieve the Board of Directors, or any individual Director, of any responsibility imposed upon them by law.

SECTION 2. Executive Committee of the Board of Directors. The Executive Committee of the Board of Directors shall be a Board Committee and shall comprise the President/Chair of the Board, the First Vice President/President-Elect, the Second Vice President, the Treasurer, the Secretary, and the Immediate Past President. The Executive Committee shall:

- A. act for the Board of Directors between meetings only as directed by the Board of Directors;
- B. prior to the start of the new fiscal year of the Council, review the budget for the next fiscal year for presentation to the Board of Directors; and
- C. periodically review the budget, investments, financial policies, and financial positions of the Council and make recommendations concerning the same to the Board of Directors for appropriate action.

SECTION 3. <u>Audit Committee</u>. The Audit Committee, appointed in the same manner and with the same term as all other Committees, shall be a Board Committee and shall consist of the Treasurer, who shall serve as the chair of the Committee, up to one additional Executive Committee member, and from one to three additional members of the Board of Directors who are not members of the Executive Committee. The Audit Committee shall report to the Board of Directors and shall be responsible for overseeing the Council's financial controls and auditing, including receiving the annual audit and considering the items of internal accounting control that arise from the audit, from personnel changes, and from the implementation of changes in policies that affect internal financial controls. The Audit Committee shall annually select and engage an independent auditor of the Council's financial records.

SECTION 4. <u>Advisory Committees</u>. Advisory Committees may be created by affirmative vote of a majority of the Directors present at a meeting at which there is a quorum or as set forth in these Bylaws. The Board of Directors may delegate to any of the Elected Officers or the Immediate Past President the authority to supervise the work of any of the Advisory Committees.

SECTION 5. Committee Membership. In accordance with Article VIII, Section 2, the President/Chair of the Board shall select the members of all Committees subject to approval by the Board of Directors. Except as otherwise specifically provided in these Bylaws, the President/Chair of the Board shall select the Chair of each Committee. The terms of all Committee appointments shall be for one year, during the President/Chair of the Board's term in such capacity, except as otherwise approved by the Board of Directors. Any unfilled or vacant Board Committee positions shall be filled in accordance with the regular procedures for appointment. The Board of Directors may at any time, by the affirmative vote of a majority of the Directors then in office, discontinue a Board Committee or Advisory Committee other than those established by these Bylaws (which may only be discontinued by amendment of these Bylaws), and make any changes in a Committee's membership without regard to the terms of appointment of the Committee members.

SECTION 6. <u>Reports of Committees</u>. Each Committee shall report in writing annually to the Board of Directors, at least 60 days prior to the date of the Annual Business Meeting and shall make interim reports to the Board of Directors as directed.

SECTION 7. General Procedure of Committees. Every Committee shall perform in accordance with these Bylaws and with the directions of the Board of Directors. The provisions of these Bylaws that govern Board of Directors' meetings, action without meetings, notice and waiver of notice, and quorum and voting requirements of the Board of Directors shall apply to meetings and action of the Committees and their members as well. With the approval of the Board of Directors, every Committee may call and hold meetings and meet with other organizations or their representatives; provided that an Advisory Committee may not take any action to bind the Board of Directors or otherwise exercise any powers or authority of the Board of Directors, and no Committee may take any actions prohibited under Article XII, Section 1 of these Bylaws.

SECTION 8. <u>Advisory Committees</u>. The following Advisory Committees are hereby established and may from time to time make recommendations to the Board of Directors for consideration, subject to the terms of these Bylaws and applicable law:

- A. Education Committee: The Education Committee shall assess and recommend updates to the Board of Directors with respect to the Council's education and continuing education policies for use by Member Boards and the Council's relationship with the National Architectural Accrediting Board.
- B. Experience Committee: The Experience Committee shall assess and recommend updates to the Board of Directors with respect to the Architectural Experience Program for use by Member Boards.
- C. Examination Committee: The Examination Committee shall assess and recommend updates to the Board of Directors with respect to the Examination for use by Member Boards.

- D. Policy Advisory Committee: The Policy Advisory Committee shall review proposed resolutions and special publications, as directed by the Board of Directors, for their impact on and consistency with Council policies and programs and make recommendations on such matters to the Board of Directors.
- E. Professional Conduct Committee: The Professional Conduct Committee shall oversee the development, application, assessment, and adjudication of Council policies and practices relating to the professional conduct of Council Record holders and others using Council services.
- F. Member Board Executives Committee: The Member Board Executives Committee shall consider issues of concern to the jurisdictions and Member Board Executives.
- G. Regional Leadership Committee: The Regional Leadership Committee shall discharge its responsibilities as described in Article V, Section 5, and consider issues of concern to the Regions. The membership of the Committee shall be the Region Chairs of each of the Regions, any person designated by the Region as the chief administrative officer of the Region, and the First Vice President/President-Elect who shall serve as Chair of the Committee.
- H. Credentials Committee: The Credentials Committee shall oversee the nomination and election process for positions on the Board of Directors, verify candidate qualifications for office, examine and verify Voting Delegate credentials, report to the membership regarding quorum at the Annual Business Meeting, and tabulate and report election results to the President/ Chair of the Board. Members of the Credentials Committee shall be sitting Member Board Members and/or Member Board Executives.
- Diversity, Equity, and Inclusion Committee: The Diversity, Equity, and Inclusion (DEI) Committee explores and recommends strategies to improve the diversity, equity, and inclusive culture of NCARB to ensure that the organization represents the population it serves.
- J. Other: Committees, task forces, and work groups may be established from time to time by the President/ Chair of the Board with the approval of the Board of Directors

SECTION 9. <u>Select Committees</u>. Whenever the Council establishes by resolution a Committee, a majority of whose members are, in accordance with such resolution, to be selected by a procedure other than those set out in Section 5 of Article XII, such a Committee shall be deemed a Select Committee and shall have, in addition to the duties and powers set out in the resolution, the right, to offer resolutions to be voted on at the Annual Business Meeting on subjects germane to the work of such Select Committee, provided such resolutions are included in the annual report of

such Select Committee submitted to the Board of Directors in accordance with Section 6 of this Article XII. Such annual report of a Select Committee shall be distributed to the membership not later than 30 days prior to the Annual Business Meeting without revision by the Board of Directors. A Select Committee may be a Board Committee or an Advisory Committee, provided that the procedures and authority applicable to such Select Committee are consistent with those of a Board Committee or Advisory Committee, as applicable.

#### **ARTICLE XIII—INDEMNIFICATION**

In addition to such further indemnification as may be authorized by the Board of Directors from time to time consistent with applicable law, to the fullest extent permitted by law, including without limitation Section 504 of the Iowa Code known as the Revised Iowa Nonprofit Council Act ("RINCA") and after the Council's Board of Directors makes the determination that the standards of Section 504.852 of RINCA (or successor provisions) have been met for the specific proceeding at issue, any present or former Director or employee determined by Board of Directors to be an executive employee, or member of a Committee, or the estate or personal representative of any such person, made a party to any action, suit or other proceeding, civil or criminal, by reason of the fact that such person is or was serving the Council as such, or serving at the Council's request in any other entity or with respect to the Council's employee benefit plan, shall be indemnified by the Council against the reasonable expenses, including without limitation amounts paid by way of judgment, fine or penalty and reasonable defense costs including attorney's fees incurred in connection with the defense of such proceeding whether or not such defense shall be successful in whole or in part, or in connection with any appeal therein, or any settlement of any such proceeding on terms approved by the Board of Directors. Such indemnification shall not be deemed exclusive of any other rights to which such persons may be entitled. Any other present or former employee or agent of the Council may also be indemnified with the approval of the Board of Directors. Expenses incurred of the character described above may, with the approval of the Board of Directors, be advanced to any person entitled to indemnity upon satisfaction of the requirements of Section 504.854 (or successor provisions) of RINCA. The Council shall have the power to purchase and maintain insurance on behalf of any person described above, or any other employee, volunteer or agent of the Council, against liability asserted against or incurred by such person on account of their status as such, whether or not the Council would have the power to indemnify or advance expenses to such persons.

#### ARTICLE XIV—AMENDMENTS

These Bylaws may be amended at any special meeting or Annual Business Meeting of the Council by resolution submitted to the Member Boards not less than 30 days prior to the meeting at which the resolution is to be considered. An affirmative vote by not less than two-thirds of the Member Boards shall be required to secure adoption of any amendment to these Bylaws.

## STRATEGIC PLAN

Last updated in 2019, the Strategic Plan provides a framework for organizational initiatives over the next several years. This year, the plan's design was updated to include the Vision Statement and Statement on Diversity.

#### STRATEGIC PLAN

#### **OUR MISSION**

NCARB, in collaboration with licensing boards, facilitates the licensure and credentialing of architects to protect the health, safety, and welfare of the public.

#### **OUR VISION**

Ensuring safe spaces and places for all communities.

#### **OUR DIVERSITY COMMITMENT**

NCARB is committed to creating a diverse, inclusive, and equitable organization where customers, volunteers, and employees, whatever gender, race, ethnicity, national origin, age, sexual orientation or identity, experience, backgrounds, perspectives, education, or disability, feel valued and respected...

#### ENHANCE

continuous quality improvements that drive the success of core operations, programs, and services

#### GROW

targeted opportunities, typically prioritized from ongoing areas of focus, designed to expand reach and impact

#### TRANSFORM

meaningful investments in new areas that will yield significant return on investment or mission and position the organization for future success

#### STRATEGIC GOALS

#### **Facilitate Licensure**

NCARB's programs and services enable the pursuit, achievement, and ongoing maintenance and mobility of architectural licensure

#### **Foster Collaboration**

NCARB's proactive engagement with licensin boards and industry organizations advances the understanding and effectiveness of architectural regulation

#### **Maximize Value**

NCARB's programs and services further the progress of our licensing boards and customers Program and Service Excellence

Awareness in the Architecture Community

Stakeholder Systems, Tools, and Resources Data Analysis and Thought Leadership

Advocacy Support, Outreach, and Influence Future-focused Research and Development LET'S GO FURTHER

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## FINANCIAL STATEMENTS

NCARB provides Member Boards with a yearly summary of the organization's financial results at the Annual Business Meeting, including the year-end results, next fiscal year's budget, and organizational fees. An audit of NCARB's financial statements is conducted annually by an independent auditing firm.

# National Council of Architectural Registration Boards

Consolidated Financial Report June 30, 2022

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#### **Independent Auditor's Report**

RSM US LLP

Board of Directors

National Council of Architectural Registration Boards

#### **Report on the Audit of the Financial Statements**

#### **Opinion**

We have audited the consolidated financial statements of National Council of Architectural Registration Boards and Lineup Management Services, LLC (collectively, the Council), which comprise the consolidated statements of financial position as of June 30, 2022 and 2021, the related consolidated statements of activities, cash flows and functional expenses for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Council as of June 30, 2022 and 2021, and the changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

#### **Basis for Opinion**

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Council and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### Emphasis of Matter

As discussed in Note 11 to the financial statements, the 2021 financial statements have been restated to correct a misstatement. Our opinion is not modified with respect to this matter.

#### Responsibilities of Management for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Council's ability to continue as a going concern within one year after the date that the financial statements are issued or available to be issued.

#### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

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#### Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and, therefore, is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to
  fraud or error, and design and perform audit procedures responsive to those risks. Such procedures
  include examining, on a test basis, evidence regarding the amounts and disclosures in the financial
  statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Council's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that
  raise substantial doubt about the Council's ability to continue as a going concern for a reasonable
  period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

#### Other Information Included in the Annual Report

Management is responsible for the other information included in the annual report. The other information comprises the contents of "Annual Report 2022" but does not include the financial statements and our auditor's report thereon. Our opinion on the consolidated financial statements does not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the consolidated financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the consolidated financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

RSM US LLP

Washington, D.C. December 7, 2022

#### National Council of Architectural Registration Boards

## Consolidated Statements of Financial Position June 30, 2022 and 2021

	2022	(	2021 (As Restated)	
Assets	-		,	
Cash and cash equivalents	\$ 3,627,179	\$	2,666,715	
Investments	28,345,338		35,885,370	
Accounts receivable, net	12,870		58,861	
Prepaid expenses and other assets	861,404		880,112	
Investments—deferred compensation	612,624		597,618	
Property, equipment and capitalized software, net	 7,069,652		6,874,689	
Total assets	 40,529,067	\$	46,963,365	
Liabilities and Net Assets				
Liabilities:				
Accounts payable and accrued expenses	\$ 2,161,019	\$	1,484,079	
Accrued payroll and related liabilities	2,413,688		1,619,420	
Deferred revenue	2,856,519		3,197,443	
Deferred rent	5,214,185		5,402,896	
Deferred compensation	 612,624		597,618	
Total liabilities	 13,258,035		12,301,456	
Commitments and contingencies (Notes 8 and 9)				
Net assets without donor restrictions:				
Undesignated	25,864,599		33,096,701	
Regional conferences' net assets	599,321		553,904	
Board designated—business development	 807,112		1,011,304	
Total net assets	 27,271,032		34,661,909	
Total liabilities and net assets	\$ 40,529,067	\$	46,963,365	

See notes to consolidated financial statements.

#### **National Council of Architectural Registration Boards**

#### Consolidated Statements of Activities Years Ended June 30, 2022 and 2021

		2021	
	2022	(	As Restated)
Revenue, NCARB and regional activities:			
Customer relations income	\$ 23,588,050	\$	22,591,322
Examination income	10,428,480		9,543,641
Member board dues	55,000		357,500
Interest and dividends, net of fees	466,983		513,757
Education income	30,790		23,625
Annual meetings, regional activities and other income	 128,834		191,730
Total revenue, NCARB and regional activities	34,698,137		33,221,575
Expenses, NCARB and regional activities:			
Program services:			
Examination directorate	8,793,164		8,654,311
Information systems directorate	8,500,099		6,666,302
Customer relations directorate	5,017,051		4,293,302
Council relations directorate	3,962,715		2,996,538
E + E directorate	2,426,250		1,326,289
Marketing and communications directorate	1,701,314		1,538,638
Total program expenses, NCARB and regional activities	30,400,593		25,475,380
Supporting services:			
Executive office	3,917,154		2,041,820
Administration directorate	2,853,609		3,933,362
Total supporting expenses, NCARB and regional activities	 6,770,763		5,975,182
Total supporting expenses, NOARD and regional activities	 0,770,700		0,010,102
Total expenses, NCARB and regional activities	37,171,356		31,450,562
Change in net assets before Lineup LLC activities			
and investment gain or loss	(2,473,219)		1,771,013
Lineup LLC revenue	291,464		113,962
Lineup LLC business development expenses	(1,138,461)		(690,414)
Change in net assets—Lineup LLC	(846,997)		(576,452)
Realized and unrealized (loss) gain on investments	 (4,070,661)		5,068,124
Change in net assets	(7,390,877)		6,262,685
Net assets:			
Beginning (as restated)	 34,661,909		28,399,224
Ending	\$ 27,271,032	\$	34,661,909

See notes to consolidated financial statements.

# Consolidated Statements of Cash Flows Years Ended June 30, 2022 and 2021

		2022	2021
Cash flows from operating activities:			_
Cash received from:			
Customer relations income	\$	23,920,074	\$ 22,615,115
Examination income		9,655,540	8,538,185
Education income		38,790	31,875
Member board dues		245,900	452,879
Annual meetings, regional activities and other income		506,692	217,543
Total cash received		34,366,996	31,855,597
Cash paid for:			
Employment/human resource expenses		(17,150,669)	(14,229,699)
Operating expenses		(5,044,845)	(4,944,623)
Contributions		(523,318)	(423,987)
Consulting		(7,523,014)	(6,172,318)
Travel/other meeting expenses		(4,600,925)	(1,390,535)
Total cash paid		(34,842,771)	(27,161,162)
Net cash (used in) provided by operating activities		(475,775)	4,694,435
Cash flows from investing activities:			
Cash paid for:			
Transfers from (into) investments		3,936,995	(2,249,609)
Capital expenditures		(2,500,756)	(1,823,256)
Net cash provided by (used in) investing activities		1,436,239	(4,072,865)
Net increase in cash and cash equivalents		960,464	621,570
Cash and cash equivalents:			
Beginning		2,666,715	2,045,145
Ending	<u>\$</u>	3,627,179	\$ 2,666,715

See notes to consolidated financial statements.

# Consolidated Statements of Functional Expenses Years Ended June 30, 2022 and 2021

								2022										
				Progran	n Ex	penses					Supporting Expenses							
		Information	Customer	Council			Marketing and	_		Total						Total	•	
	Examination	Systems	Relations	Relations		E+E	Communications		Business	Program		Executive	Α	dministration		Supporting		
	Directorate	Directorate	Directorate	Directorate		Directorate	Directorate		Development	Expenses		Office		Directorate		Expenses		Total
Expenses:																		
Employment/human resources	\$ 1,331,148	\$ 4,296,685	\$ 3,882,802	\$ 992,113	\$	1,134,622	\$ 1,308,748	\$	778,576	\$ 13,724,694	\$	1,643,004	\$	2,236,127	\$	3,879,131	\$	17,603,825
Operating expenses	1,082,016	3,949,885	1,032,224	227,634		331,518	265,338		279,777	7,168,392		593,673		480,907		1,074,580		8,242,972
Consulting	5,992,916	241,142	89,012	265,932		93,905	120,048		29,457	6,832,412		368,961		121,021		489,982		7,322,394
Travel and meeting expenses	386,529	12,387	10,436	1,835,357		864,281	7,180		50,066	3,166,236		1,235,011		15,396		1,250,407		4,416,643
Contributions	555	-	2,577	487,318		1,924	-		585	492,959		76,505		158		76,663		569,622
Other BOD/office expenses	-	-	-	154,361		-	-		-	154,361		-		-		-		154,361
Total expenses	\$ 8,793,164	\$ 8,500,099	\$ 5,017,051	\$ 3,962,715	\$	2,426,250	\$ 1,701,314	\$	1,138,461	\$ 31,539,054	\$	3,917,154	\$	2,853,609	\$	6,770,763	\$	38,309,817

								2021										
				Progran	n Exp	penses					Supporting Expenses							
•		Information	Customer	Council			Marketing and			Total						Total		
	Examination	Systems	Relations	Relations		E+E	Communications		Business	Program		Executive	F	Administration		Supporting		
	Directorate	Directorate	Directorate	Directorate		Directorate	Directorate	ŗ	Development	Expenses		Office		Directorate		Expenses		Total
Expenses:																		
Employment/human resources	\$ 1,119,714	\$ 2,891,993	\$ 3,078,484	\$ 996,015	\$	1,055,480	\$ 1,149,859	\$	481,360	\$ 10,772,905	\$	1,636,938	\$	2,243,189	\$	3,880,127	\$	14,653,032
Operating expenses	1,088,539	3,766,947	1,164,257	337,068		257,488	192,376		185,695	6,992,370		74,274		1,398,451		1,472,725		8,465,095
Consulting	6,443,077	5,480	47,726	129,979		6,060	192,208		13,058	6,837,588		83,457		242,042		325,499		7,163,087
Travel and meeting expenses	2,981	899	1,828	998,979		6,989	498		10,301	1,022,475		235,343		19,288		254,631		1,277,106
Contributions	-	983	1,007	417,257		272	3,697		-	423,216		11,808		30,392		42,200		465,416
Other BOD/office expenses	-	-	-	117,240		-	-		-	117,240		-		-		-		117,240
Total expenses	\$ 8.654.311	\$ 6.666.302	\$ 4.293.302	\$ 2.996.538	\$	1.326.289	\$ 1,538,638	\$	690.414	\$ 26.165.794	\$	2.041.820	\$	3.933.362	\$	5.975.182	S	32,140,976

See notes to consolidated financial statements.

#### **Notes to Consolidated Financial Statements**

#### Note 1. Nature of Activities and Significant Accounting Policies

**Nature of activities:** National Council of Architectural Registration Boards (the Council) is a nonprofit organization of individual architectural registration boards. The general purpose of the Council is to protect the public health, safety and welfare by leading the regulation of the practice of architecture through the development and application of standards for licensure and credentialing of architects.

The accompanying consolidated financial statements include the accounts of the Council and five of its regional conferences. The Council authorizes these five regional conferences to use its taxpayer identification number in conjunction with operating and managing the activities of the regional conferences. The net assets and operations of these five regional conferences have been included in the Council's operations for purposes of financial and tax reporting.

During the year ended June 30, 2019, Lineup Management Services, LLC (Lineup) was formed as a single member limited liability company with the Council as its sole member. The purpose of Lineup is to develop and sell a software tool designed to help organizations better manage the skills and demographics of work teams.

A summary of the Council's significant accounting policies follows:

**Principles of consolidation:** The consolidated financial statements include the accounts of National Council of Architectural Registration Boards, inclusive of council regions one, two, four, five and six (see Note 10), and Lineup Management Services, LLC (collectively, referred to as the Council). Significant intercompany accounts and transactions have been eliminated in consolidation.

**Basis of presentation:** The consolidated financial statement presentation follows the Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC). As required by the Not-For-Profit Entities Topic of the FASB ASC, the Council is required to report information regarding its financial position and activities according to two classes of net assets: without donor restrictions and with donor restrictions. As of and for the years ended June 30, 2022 and 2021, there were no net assets with donor restrictions.

**Net assets without donor restrictions, undesignated:** Net assets held by the Council and its regional conferences whose use is not restricted by donors or internally designated for other uses.

**Net assets without donor restrictions, designated:** Net assets consisting of funds designated by the Board of Directors (the Board) to be used for specific purposes. The Business Development Fund was created to support the development and sale of proprietary software products to third parties. Since the inception of the Business Development Fund, a cumulative amount of \$3,163,975 and \$2,663,975 has been expended for this purpose through June 30, 2022 and 2021, respectively.

**Income tax status:** The Council is exempt from income taxes on its exempt activities under the provisions of Section 501(c)(6) of the Internal Revenue Code. However, the Council is subject to income taxes on any unrelated business income. For the years ended June 30, 2022 and 2021, the Council had unrelated business income from Lineup LLC software sales of \$291,464 and \$113,962, respectively. As a single member LLC, Lineup does not file a separate income tax return and its activities are included in the Council's tax returns. Thus, Lineup is treated as a disregarded entity for income tax purposes.

**Use of estimates:** The preparation of consolidated financial statements in conformity with accounting principles generally accepted in the United States of America (U.S. GAAP) requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from estimates.

#### **Notes to Consolidated Financial Statements**

#### Note 1. Nature of Activities and Significant Accounting Policies (Continued)

Cash and cash equivalents: For consolidated financial statement purposes, the Council considers all checking accounts, overnight repurchase agreements, money market funds and highly liquid investments with original maturities of 90 days or less to be cash and cash equivalents except for money market funds held in the investment portfolio. At times, certain balances held within these accounts may not be fully guaranteed or insured by the U.S. federal government. The Council has not experienced any such losses in the past and does not believe it is exposed to any significant financial risk on these cash balances.

Overnight repurchase agreements involve investment risks, including the possible loss of principal. The mortgage-backed securities bought and sold daily are collateralized by one or more pools of residential mortgage loans that conform to the standards of the Federal National Mortgage Association (FNMA or Fannie Mae) or the Federal Home Loan Mortgage Corporation (FHLMC or Freddie Mac) at the time of securitization. The Council had \$2,177,617 and \$1,696,488 in its overnight repurchase agreements account at June 30, 2022 and 2021, respectively.

**Investments:** Investments with readily determinable fair values are reflected at fair value. To adjust the carrying value of these investments, the change in fair value is recorded to investment return net of related fees on the statements of activities. The Council invests funds in a professionally managed portfolio that contains various securities. Such investments are exposed to market and credit risks. Thus, the Council's investments may be subject to significant fluctuations in fair value. As a result, the investment balances reported in these consolidated financial statements may not be reflective of the portfolio's value during subsequent periods.

**Investment income:** Interest and dividends are reported as operating activities, while the current year changes in fair value of investments (realized and unrealized gains and losses) are reported as nonoperating activities. Investment fees are netted with interest and dividends income in the consolidated statements of activities.

Accounts receivable: Accounts receivable consists primarily of registration fees for the Council's annual meeting. Accounts receivable are presented at the net amount due to the Council. The Council's management periodically reviews the status of all accounts receivable balances for collectability. Each receivable balance is assessed based on management's knowledge of the customer, the Council's relationship with the customer, and the age of the receivable balance. Based on management's assessment, there are no uncollectible receivables as of June 30, 2022 and 2021, respectively.

**Property, equipment and capitalized software:** Acquisitions of property, equipment and capitalized software greater than \$5,000 are recorded at cost and depreciated using the straight-line method over their respective useful lives, ranging from three to 10 years. Leasehold improvements are amortized on a straight-line method over the shorter of the lease term or estimated useful life of the asset. Capitalized Architect Registration Examination (ARE) development costs are amortized on a straight-line method over an estimated useful life of five years.

**Impairment policy:** Long-lived assets are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount of an asset may not be recoverable. Recoverability of long-lived assets is measured by a comparison of the carrying amount of the asset to future undiscounted net cash flows expected to be generated by the asset. If such assets are considered to be impaired, the impairment to be recognized is measured by the amount by which the carrying amount of the assets exceeds the estimated fair value of the assets. Assets to be disposed of are reportable at the lower of the carrying amount or fair value, less costs to sell. During the years ended June 30, 2022 and 2021, management did not consider the value of any property or equipment or intangible assets to be impaired.

#### **Notes to Consolidated Financial Statements**

#### Note 1. Nature of Activities and Significant Accounting Policies (Continued)

Adopted accounting pronouncements: In September 2020, the FASB issued ASU 2020-07, *Not-for-Profit Entities (Topic 958): Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets*, which requires a not-for-profit entity to present contributed nonfinancial assets in the consolidated statements of activities as a line item that is separate from contributions of cash or other financial assets. ASU 2020-07 also requires additional qualitative and quantitative disclosures about contributed nonfinancial assets received, disaggregated by category. This ASU was adopted by the Council for the fiscal year ended June 30, 2022. The adoption of the ASU had no impact on the consolidated financial statements.

**Revenue:** The Council's activities are primarily supported through customer relations income, examination income and member board dues. Prices charged to customers are specific to distinct performance obligations and do not consist of multiple transactions. Economic factors are driven by consumer confidence, employment, inflation and other world events that impact the timing and level of cash received and revenue recognized by the Council. Periods of economic downturn resulting from any of the above factors may result in declines in future cash flows and recognized revenue of the Council.

The Council did not have any impairment or credit losses on any receivables or contract assets arising from contracts with customers. There are also no incremental costs of obtaining a contract and no significant financing components. Finally, there are no significant changes in the judgments affecting the determination of the amount and timing of revenue from contracts with customers.

Customer relations income: Revenue from the Council's customer relations income includes services performed by the Council related to the creation, maintenance and transmittal of records for registered architects and architect licensure candidates. Fees paid by the customer are nonrefundable and paid in advance for each transaction. Income related to the creation of records is recognized at the point in time when the customer has access to their record. Income related to annual renewals of records is recognized at the point in time when the previous customer record has expired. Income related to transmittals is recognized at the point in time when the record has been transmitted to the designated architectural authority.

**Examination income:** Revenue associated with the ARE is recognized at the point in time when registrants take the divisions of the examination (including no-shows) or when the allowable exam scheduling period has lapsed. Revenue and the related third-party exam administration fees are reported at gross based on a contractual agreement, which requires the Council to withhold and pay fees from the amounts collected from the candidates.

Member board dues: Member board dues are billed annually in advance of the membership period which coincides with the Council's fiscal year (July 1 to June 30). Dues revenue is recognized during the fiscal year of the membership. Member benefits are not available individually outside of membership. Member benefits include the development and delivery of the ARE for the member jurisdiction's licensure candidates; administration of the Architectural Experience Program (AXP); administration of the architect/licensure candidate record development, credential verification and electronic transmittal process, which facilitates the licensure process; access to a database of disciplinary actions taken against architects around the country; development of and access to regulatory tools and advocacy resources to help navigate the current licensing environment and funding for authorized member board staff to attend certain meetings held by the Council. All member benefits are considered one performance obligation, given that benefits are accessible to the member throughout the term of membership.

#### **Notes to Consolidated Financial Statements**

#### Note 1. Nature of Activities and Significant Accounting Policies (Continued)

**Deferred revenue:** Deferred revenue consists primarily of cash received for record renewals and examination registrations, which have been received in advance of the record expiration date and examination date, respectively.

**Contract balances:** The timing of revenue recognition may not align with the right to invoice the customer. The Council records accounts receivable when it has the unconditional right to issue an invoice and receive payment, regardless of whether revenue has been recognized. If revenue has not yet been recognized, a contract liability (deferred revenue) is also recorded. If revenue is recognized in advance of the right to invoice, a contract asset (unbilled receivable) is recorded. Opening contract balances as of July 1, 2020 consisted of \$79,447 of accounts receivable and \$3,398,962 of deferred revenue.

**Functional allocation of expenses:** The costs of providing various programs and other activities of the Council have been summarized on a functional basis in the consolidated statements of activities and consolidated statements of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited. Salaries and benefits are allocated based on estimates of the percentage of the employee time spent on relevant activities as determined by the annual budget. Rent and other overhead costs are allocated based on individual department headcounts.

**Upcoming accounting pronouncements:** In February 2016, the FASB issued ASU 2016-02, *Leases (Topic 842)*, which changes the accounting for leases. Under the new guidance, lessees will be required to recognize the following for all long-term leases: (1) a lease liability, which is the lessee's obligation to make lease payments measured on a discounted basis and (2) a right-of-use asset, which represents the lessee's right to use (or control use of) a specified asset for the lease term. The standard will be effective for the Council for the fiscal year ending June 30, 2023. The Council is currently in the process of evaluating the impact the new accounting guidance will have on the consolidated financial statements.

**Subsequent events:** The Council has evaluated subsequent events through December 7, 2022, the date one which the consolidated financial statements were available to be issued.

#### Note 2. Investments

Investments other than deferred compensation holdings consist of the following at June 30, 2022 and 2021:

	2022	2021
Fixed income securities:		_
Exchange-traded funds	\$ 9,089,481	\$ 9,941,164
Equity securities:		
Exchange-traded funds	15,293,135	22,310,534
Mutual funds	373,798	-
Alternative investments	3,338,071	3,437,711
Certificate of deposits	102,778	71,262
Cash and money market funds	148,075	124,699
Total investments	\$ 28,345,338	\$ 35,885,370

#### **Notes to Consolidated Financial Statements**

#### Note 2. Investments (Continued)

Deferred compensation holdings consist of the following at June 30, 2022 and 2021:

	 2022	2021
Equity mutual funds	\$ 241,948	\$ 346,368
Money market funds	 370,676	251,250
	\$ 612,624	\$ 597,618

The Council's investments are allocated as follows as of June 30, 2022 and 2021:

	2022			2021
Short-term reserve	\$	3,906,197	\$	3,986,587
Business development fund		807,112		1,011,304
Strategic reserve		18,184,823		24,769,031
Growth fund		5,447,206		6,118,448
	\$	28,345,338	\$	35,885,370

Investment (loss) income consists of the following for the years ended June 30, 2022 and 2021:

	2022			2021
Interest and dividends	\$	582,406	\$	615,915
Realized and unrealized (loss) gain on investments		(4,070,661)		5,068,124
Investment fees		(115,423)		(102,158)
	\$	(3,603,678)	\$	5,581,881

Investment purchases and sales between investment accounts for the year ended June 30, 2022, were \$8,875,344 and \$12,398,085, respectively, and investment purchases and sales between investment accounts for the year ended June 30, 2021, were \$18,323,005 and \$17,905,065, respectively.

### Note 3. Fair Value Measurements

The Fair Value Measurement Topic of the ASC defines fair value as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date and sets out a fair value hierarchy. The fair value hierarchy gives the highest priority to quoted prices in active markets for identical assets or liabilities (Level 1) and the lowest priority to unobservable inputs (Level 3). Inputs are broadly defined under this topic as assumptions market participants would use in pricing an asset or liability.

**Level 1:** Unadjusted quoted prices in active markets for identical assets or liabilities that the reporting entity has the ability to access at the measurement date. As required by the Fair Value Measurement Topic, the Council does not adjust the quoted prices for these investments even in situations where the Council holds a large position, and a sale could reasonably impact the quoted price.

#### **Notes to Consolidated Financial Statements**

#### Note 3. Fair Value Measurements (Continued)

**Level 2:** Inputs other than quoted prices within Level 1 that are observable for the asset or liability, either directly or indirectly, and fair value is determined through the use of models or other valuation methodologies. A significant adjustment to a Level 2 input could result in the Level 2 measurement becoming a Level 3 measurement.

**Level 3:** Inputs that are unobservable for the asset or liability and include situations where there is little, if any, market activity for the asset or liability. The inputs into the determination of fair value are based upon the best information in the circumstances and may require significant management judgment or estimation. There were no Level 3 inputs for any assets or liabilities held by the Council at June 30, 2022 and 2021.

As a practical expedient, the Council is permitted to estimate fair value of an investment using the reported net asset value (NAV) without further adjustment unless the Council expects to sell the investment at a value other than NAV or if the NAV is not calculated in accordance with generally accepted accounting principles. Management monitors the reports provided by fund managers and believes their estimates of value to be fair approximations of the exit price for these investments.

The following is a summary of the input levels used to determine fair values at June 30, 2022 and 2021:

				2022	<u>)</u>			
		Total		Level 1		Level 2	Le	evel 3
Investments:								
Fixed income exchange-traded funds	\$	9,089,481	\$	9,089,481	\$	-	\$	-
Equity exchange-traded funds		15,293,135		15,293,135		-		-
Equity mutual funds		373,798		373,798		-		-
		24,756,414		24,756,414		-		-
Alternative investments valued at NAV		3,338,071						
Cash and CDs, at cost		250,853						
Total investments	\$	28,345,338	<b>-</b> =					
Deferred compensation assets:								
Equity mutual funds	\$	241,948	\$	241,948	\$	-	\$	-
Money market funds		370,676		370,676		-		-
Total deferred compensation								
assets	\$	612,624	\$	612,624	\$	-	\$	
Liebilities.								
Liabilities:	•	040.004	•		•	040.004	•	
Deferred compensation liability	\$_	612,624	\$	-	\$	612,624	\$	-

#### **Notes to Consolidated Financial Statements**

Note 3. Fair Value Measurements (Continued)

	2021										
		Total		Level 1		Level 2	L	evel 3			
Investments:											
Fixed income exchange-traded funds	\$	9,941,164	\$	9,941,164	\$	-	\$	-			
Equity exchange-traded funds		22,310,534		22,310,534		-		-			
		32,251,698	\$	32,251,698	\$	-	\$	-			
Alternative investments valued at NAV		3,437,711									
Cash and CDs, at cost		195,961	_								
Total investments	\$	35,885,370	_								
Deferred compensation assets:											
Equity mutual funds	\$	346,368	\$	346,368	\$	-	\$	-			
Money market funds		251,250		251,250		-					
Total deferred compensation											
assets	\$	597,618	\$	597,618	\$	-	\$	-			
Liabilities:											
Deferred compensation liability	\$	597,618	\$		\$	597,618	\$	-			

Certain cash and cash equivalents and certificates of deposit included in the investment portfolio (see Note 2 for totals) are not subject to the provisions of fair value measurements as they are recorded at cost.

Investments classified in Level 2 were valued by pricing vendors using outside data. In determining the fair value of the investments, the pricing vendors use a market approach to obtain pricing spreads based on the credit risk of the issuer, maturity, current yield and other terms and conditions of each security. Management believes the estimated fair values of assets classified in Level 2 to be a reasonable approximation of the exit price for these investments. The deferred compensation liabilities are based on the fair value of the deferred compensation assets, which are observable inputs; however, the liabilities are not publicly traded and are, therefore, considered Level 2 items.

#### **Notes to Consolidated Financial Statements**

#### Note 3. Fair Value Measurements (Continued)

The following presents further information regarding the composition of the Council's investments measured under the NAV practical expedient at June 30, 2022 and 2021:

		2022	2021	Un	funded	Redemption	Redemption
Alternative Investment		Fair Value	Fair Value	Com	mitments	Frequency	Notice Period
Alkeon Growth Offshore Fund Ltd	\$	677,926	\$ 1,140,902	\$	-	See (a) below	See (a) below
Hudson Bay International Fund Ltd		1,168,133	1,166,314		-	See (b) below	See (b) below
Starwood Real Estate Income Trust—Class D		1,492,012	1,130,495		-	See (c) below	See (c) below
	\$	3,338,071	\$ 3,437,711	_			

- (a) Alkeon Growth Offshore Fund Ltd's investment objective is to achieve maximum capital appreciation. The fund pursues this objective by investing its assets primarily in equity securities of U.S. and foreign companies that the investment manager believes are well positioned to benefit from demand for their products or services, including companies that can innovate or grow rapidly relative to their peers in their markets. Redemptions are permitted quarterly with 20 calendar days' notice.
- (b) Hudson Bay International Fund Ltd's investment objective is to target traditional and nontraditional sources of alpha by employing a diverse set of catalyst-driven absolute return strategies that are intended to be uncorrelated to each other and to the major indices. In deploying its trading and investing strategies, the fund expects to hold both long and short positions in a broad range of debt and equity securities, derivatives and other financial instruments on a global basis. Generally, upon at least 65 days' prior written notice to the fund's administrator, a shareholder may redeem up to 25%, 33.33%, 50% and 100%, respectively, of its redemption date value as of any four successive calendar quarter-ends (such 25%, 33.33%, 50% and 100% amounts, the applicable percentage for a particular redemption date).
- (c) Starwood Real Estate Income Trust's investment objective is to invest primarily in stabilized, incomeoriented commercial real estate. The trust's portfolio is principally comprised of properties located in the United States but may be diversified on a global basis through the acquisition of properties outside the United States, with a focus on Europe. Redemptions can be submitted daily and are processed monthly. The request must be received in good order on the second to last business day of the applicable month. There is no daily liquidity option available.

## Note 4. Liquidity

The Council strives to maintain liquid financial assets sufficient to cover approximately 60 days of general expenditures. Financial assets in excess of daily cash requirements are invested in money market funds, certificates of deposit and other short-term investments.

The board-designated funds are intended to fund specific initiatives not considered in the annual operating budget. In the event the need arises to utilize the board-designated funds for liquidity purposes, the reserves could be drawn upon through board resolution.

#### **Notes to Consolidated Financial Statements**

## Note 4. Liquidity (Continued)

The following financial assets are available within one year to meet cash needs for general expenditures as of June 30, 2022 and 2021:

	2022	2021
Cash and cash equivalents	\$ 3,627,179	\$ 2,666,715
Investments	28,345,338	35,885,370
Accounts receivable	12,870	58,861
Investments—deferred compensation	612,624	597,618
Financial assets	32,598,011	39,208,564
Less amounts not available for general expenditure:		
Investments—deferred compensation	(612,624)	(597,618)
Board-designated net assets—business development	(807,112)	(1,011,304)
Financial assets available to meet cash expenditures		
within one year	\$ 31,178,275	\$ 37,599,642

# Note 5. Property, Equipment and Capitalized Software

Property, equipment and capitalized software consists of the following at June 30, 2022 and 2021:

	2022			2021
Eurniture and equipment	ф	872.629	¢	054 267
Furniture and equipment Leasehold improvements	\$	2,955,849	\$	854,367 2,910,020
Computer software		2,933,649 8,183,858		6,404,929
Examination services system		4,284,503		3,626,767
		16,296,839		13,796,083
Less accumulated depreciation and amortization		(9,227,187)		(6,921,394)
	\$	7,069,652	\$	6,874,689

# Note 6. Line of Credit

The Council has access to a revolving line of credit collateralized with its assets that are held at the financial institution. The line of credit allows maximum borrowings up to \$5,000,000 and bears interest at a variable rate based upon the outstanding balance and estimated repayment period. During the years ended June 30, 2022 and 2021, no amounts were drawn on the line of credit and no amounts were outstanding under the line of credit as of June 30, 2022 and 2021.

#### **Notes to Consolidated Financial Statements**

#### Note 7. Retirement Plans

The Council has a 457(b) salary deferral plan for key executives. As part of the plan, the Council reports assets and liabilities of equal amounts attributable to the amount deferred and the related investment earnings. Information regarding the Council's invested assets of deferred compensation are disclosed in Note 2 and the fair value of the deferred compensation assets and liability is disclosed in Note 3. The balance in the deferred compensation plan is \$612,624 and \$597,618 at June 30, 2022 and 2021, respectively.

The Council maintains a defined contribution 401(k) retirement plan (the Plan) for employees. Employees are immediately eligible to contribute a percentage of their compensation to the Plan. The Plan provides qualified non-elective contributions of 3% of employee compensation. The Plan also provides for self-directed investments by employees. The Council may make annual discretionary contributions to the Plan. In order to be eligible for this discretionary contribution, an employee must complete six months of service before a plan entry date (January 1 or July 1), must complete 500 hours of service during the plan year, and must be actively employed on the last day of the plan year (December 31). Employees begin vesting in the discretionary contribution at the end of their second year of service, fully vesting at the end of six years of service. The Council made qualified non-elective contributions of \$413,000 and \$351,712, respectively, and discretionary contributions of \$303,000 and \$266,000, respectively, for the years ended June 30, 2022 and 2021.

## Note 8. Operating Leases

The Council leases office space, mailing, copying and computer equipment under noncancellable operating leases.

In March 2019, the Council entered into an office lease at 1401 H Street NW. The lease extends through February 2034. The new lease contains various incentives such as 24 months of abated rent and a tenant improvement allowance. The Council also had a lease for additional office space at 1801 K Street NW, Washington, D.C. that ended December 31, 2020.

The deferred rent liability recorded at June 30, 2022 and 2021, results from recording the variance between rent expense on a straight-line basis and cash flow basis over the term of the leases in accordance with U.S. GAAP.

Future minimum lease payments, exclusive of the Council's pro rata share of additional operating expenses, under noncancelable office space leases at June 30, 2022, are as follows:

Years ending June 30:

3	
2023	\$ 1,641,243
2024	1,626,040
2025	1,635,700
2026	1,637,638
2027	1,678,545
Thereafter	12,311,983
	\$ 20,531,149

The Council incurred rental expense of \$1,300,364 and \$2,398,578 for the years ended June 30, 2022 and 2021, respectively.

#### **Notes to Consolidated Financial Statements**

#### Note 9. Commitments and Contingencies

**Hotel space:** The Council has several contracts with hotels for future meetings and conferences. All of the contracts contain a clause whereby the Council is liable for a portion of the costs of hotel rooms and food and beverage in the event of a cancellation.

**Employment contract**: The Council has entered into a contract with their Chief Executive Officer that obligates the Council to pay up to six months of salary as severance if the Chief Executive Officer is terminated without cause.

**Legal matters:** From time to time, the Council may be subject to various legal proceedings, which are incidental to the ordinary course of business. In the opinion of management, there are no material legal proceedings to which the Council is a party.

# Note 10. Regional Conferences

Included in the Council's consolidated financial statements are the regional conferences' assets, liabilities, net assets and change in net assets, which are as follows as of and for the years ended June 30, 2022 and 2021:

	2022	2021	
Assets:			
Cash and cash equivalents	\$ 501,219	\$	456,389
Investments	102,778		102,191
Total assets	\$ 603,997	\$	558,580
Liabilities and net assets:			
Accounts payable	\$ 4,676	\$	4,676
Net assets:			
Beginning of the year	553,904		457,886
Change in net assets	45,417		96,018
Regional conferences' net assets	599,321		553,904
Total liabilities and net assets	\$ 603,997	\$	558,580

# **Notes to Consolidated Financial Statements**

# Note 11. Prior Period Adjustment

During the year ended June 30, 2022, an error in the calculation of deferred revenue was identified by management related to the recognition of revenue for completed examinations. The previously issued financial statements have been restated through a retrospective adjustment as follows:

	As Previously		Restatement		
		Reported		Adjustment	As Restated
Statement of financial position as of June 30, 2021:					
Deferred revenue	\$	5,018,149	\$	(1,820,706)	\$ 3,197,443
Total liabilities		14,122,162		(1,820,706)	12,301,456
Net assets without donor restrictions—undesignated		31,275,995		1,820,706	33,096,701
Total net assets		32,841,203		1,820,706	34,661,909
Total liabilities and net assets		46,963,365		-	46,963,365
Statement of activities for the year June 30, 2021:					
Examination income	\$	8,704,980	\$	838,661	\$ 9,543,641
Total revenue, NCARB and regional activities		32,382,914		838,661	33,221,575
Change in net assets before Lineup LLC activities					
and investment gain or loss		932,352		838,661	1,771,013
Change in net assets		5,424,024		838,661	6,262,685
Net assets without donor restrictions—undesignated, beginning		26,357,985		982,045	27,340,030
Net assets without donor restrictions, total, beginning		27,417,179		982,045	28,399,224
Net assets without donor restrictions—undesignated, ending		31,275,995		1,820,706	33,096,701
Net assets without donor restrictions, total, ending		32,841,203		1,820,706	34,661,909

# **ACRONYMS**

The following guide includes many of the acronyms and abbreviations associated with Council programs and initiatives, as well as related organizations.

A		F	
AACA	Architects Accreditation Council of Australia	FARB	Federation of Associations of Regulatory Boards
ABET	Accreditation Board for Engineering and Technology	FBD	Freedom by Design
ABM	Annual Business Meeting	FCARM	La Federación Nacional de Colegios de Arquitectos de la
ACEC	American Council of Engineering Companies		República Mexicana
ACSA	Association of Collegiate Schools of Architecture	н	
ADA	Americans With Disabilities Act	HBCU	Historically Black Colleges and Universities
AIA	American Institute of Architects		The content of the co
AIA	Australian Institute of Architects (AU)		
AIAS	American Institute of Architecture Students	IBC	International Building Code
ALA	Association of Licensed Architects	ICBO	International Conference of Building Officials
APEC	Asia-Pacific Economic Cooperation	ICC	International Code Council
ARE	Architect Registration Examination	ICOR	Interorganizational Council on Regulation
ARPL	Alliance for Responsible Professional Licensing	IDP	Intern Development Program
ASCE	American Society of Civil Engineers	IgCC	International Green Construction Code
ASID	American Society of Interior Designers	IPAL	Integrated Path to Architectural Licensure
ASINEA	Association of Institutes of Teaching and Architecture for the Republic of Mexico	IPEC	Integrated Path Evaluation Committee
AXP	Architectural Experience Program	M	
В		M.Arch.	Master of Architecture
B.Arch.	Bachelor of Architecture	MBC	Member Board Chair
BEA	Broadly Experienced Architect	MBE	Member Board Executive
BEFA	Broadly Experienced Foreign Architect	MBM	Member Board Member
ВІМ	Building Information Modeling	N	
BOCA	Building Officials and Code Administrators International	NAAB	National Architectural Accrediting Board
BOD	Board of Directors	NAED	National Academy of Environmental Design
		NBTN	NCARB by the Numbers
C		NCARB	National Council of Architectural Registration Boards
CACE	Council of Architectural Component Executives	NCEES	National Council of Examiners for Engineering and Surveying
CALA	Canadian Architectural Licensing Authorities	NOMA	National Organization of Minority Architects
CACB	Canadian Architectural Certification Board	NSPE	National Society of Professional Engineers
CART	Certification Alternatives Review Team	NZRAB	New Zealand Registered Architects Board
CIDA	Council for Interior Design Accreditation	P	
CIDQ	Council for Interior Design Qualification		
CLARB	Council of Landscape Architectural Registration Boards	PAC	Policy Advisory Committee
CLEAR	(International) Council on Licensure, Enforcement and Regulation	PCC	Professional Conduct Committee
	A Comite Mexicano para la Practica Internacional de la Arquitectura	R	
CONAR	C Consejo Nacional de Registro de la Certificación Profesional de Arquitectos	RIBA	Royal Institute of British Architects
CSI	Construction Specifications Institute	S	
D		SARA	Society of American Registered Architects
_	Doctor of Architecture	SDA	Society for Design Administration
D.Arch.	Doctor of Architecture	U	
E		UIA	International Union of Architects
EAC	Experience Advisory Committee	USGBC	U.S. Green Building Counci
EDU	Education Committee		2.2. 2.3. 2.3. 2.3. 0
EESA	Education Evaluation Services for Architects		
EXCOM	Executive Committee		