

November 29, 2019

Discussion following presentations on Practice Review by Scott Westlund, Director of Practice Review at ALSA, and Dave Gurnsey, Chair of the SLSA Practice Review Standards committee at the fall seminar

- Dave Gurnsey encouraged members to contact any member of the committee with feedback/questions
- An email reminder will be sent to members next week
- The slides from both presentations will be posted on the SLSA website

Q & A (summary only - not verbatim)

- **Q** - Dan Codling: The general theme seems to be that practice review replaced plan review. Is the plan review we currently have by ISC locked in for a fixed time? Could that be changed?
- **A** - Dave Gurnsey: Legislation states that plans have to be approved before registration. For plan review to cease, and I am not suggesting that we would want that, the regulations would have to change.
- **Q** -Gerald Johnson: How relevant are the concerns regarding public opinion that have been brought to our attention? (not that we need to have negative public opinion to implement a change)
- **A** - Courtney Tripp: We discussed this with the Minister this morning. He is aware of the trend across the country, but not aware of any public concern regarding SLSA. We advised him that we are attempting to be proactive. No public scepticism has been expressed to the SLSA office.
- **A** - Pat Maloney added that members of the Professional Conduct Committee attended a workshop this month on investigation, professional conduct, and discipline for self-governing professions. 18 self-governing professions were represented. The issues of clarity, transparency, public perception, and perceived bias were common to all. Even if SLSA is not the object of scrutiny, we could get caught up in the sweep when an incident occurs with another professional body.
- **A** - Scott Westlund stated that Alberta is feeling pressure to move away from advocacy and to regulate more comprehensively as a result of the national trends.
- **Q** - Travis Wolfe asked Pat Maloney whether the participants at this forum anticipate a sweep coming.
- **A** - Pat Maloney: there was no indication that they see a plan on the horizon, but they are definitely concerned. Perceived bias is a huge concern. Many are moving away from the term “member”, which may be perceived as self-serving. “Licensee” or “Registrant” are preferred terms, less likely to suggest a club mentality.
- **A** - Dave Gurnsey suggested that a likely scenario for increased scrutiny is that something affects another self-regulating profession, which results in the media and government looking closer at all self-regulating professions.
- **Q** - Malcolm Vanstone: What are the key differences ALSA specifies between paper based and digital field notes?
- **A** - Scott Westlund: There is a page dedicated to what should be shown on field notes (name of the observer, angles of distances, time, date, temperature, pressure, redundancy checks, what was found or not found, condition of monuments, etc). Digital field notes incorporate all of

these requirements. The fundamentals from 40 years ago still apply. The requirements didn't change, but the notations somehow did. The intent is to allow a seamless transition between the field notes and the plan. Scott cited a court case where he was called to offer an opinion on whether field notes were sufficient. They have chosen to provide clear criteria against which notes can be evaluated. Scott asks the surveyor under review to provide their typical product. It need not be a legal survey. He will check any survey, field notes, letters, etc.

- **Q** - Travis Wolfe: are the GPS coordinates considered part of the field notes?
- **A** - Scott Westlund: We view the field notes as a package, which includes the raw data and coordinate file. That said, we want to see it written down.

- **Q** - Dave Gurnsey: Further to Scott's point about reviewing any typical product, this isn't the case everywhere. Ontario's review is limited to cadastral surveys. Saskatchewan is unique in that we have the P. Surv designation. The Act gives us the right to regulate professional surveying. If we were to move forward with practice review, should it be limited to cadastral surveys?
(no discussion ensued)

- **Q** - Travis Wolfe: Do you see practice review affecting insurance claims?
- **A** - Dave Gurnsey: No. Most claims in the west are construction related, with a possible exception of BC. The east sees more boundary claims.

- **Q** - Blaine Thomson: How would practice review be funded? Has there been any consideration as to whether the client would bear some of the cost?
- **A** - Dave Gurnsey: If the members of the association were to recommend to Council that we implement this type of process, funding models would be investigated at that time. We would look at the number of plans, the post sales, etc. and make some recommendations. The committee mandate is to have a recommendation at 2021 AGM. There is a lot of work yet to be done. Possible funding models include dues (the cost of which is not passed on to the client), monuments (which probably is), or stickers/checklists (which may or may not be), etc.

- **Q** - Jared Adams: What would we point to if we were approached and asked what we are presently doing?
- **A** - Dave Gurnsey: Continuing education requirements, the complaints & discipline processes

- **Q** - Gerald Johnson: Would there be an appetite to approach ISC to divert some funds to practice review and implement it as an ISC role?
- **A** - Dave Gurnsey: We specifically didn't ask the Controller or Deputy Controller to participate with this committee because we wanted the discussion around practice review to remain independent from plan examination. If that were desired, it would take some discussion. My understanding is that plan examination is not a revenue generator for ISC, and they may prefer not to continue it, but that discussion would have to go through the Minister. *(Alan Jensen agreed)*

- **Q** - Terry Alm: To promote the educational aspect of Practice Review, does Alberta publish the recommendations/findings of the Practice Review board?
- **A** - Scott Westlund: Yes, case studies and examples are published in the quarterly ALS news (sanitized so as not to identify individuals). There has been good feedback on these. At end of every phase, they release a report to highlight the focus of that phase (eg - equipment

calibration programs). These focusses are identified through practice review – they are first noted as a common occurrence. Scott is also currently working on a professional ethics seminar. Plans are to have a video, webinar, and article series in an effort to reach every member.

Additional information shared:

- Dave Gurnsey noted that most ALS have grown up under the Practice Review scenario. It is pretty well accepted, and even sought after. There are a number of ALS who are SLS and only practice in SK. Some have asked Scott to review their SK plans (he does not).
- Kevin Beatty noted that ALSA nearly lost their monument funding at the whim of government. This funds Practice Review which they are proud of.
- Scott Westlund explained that they were notified that the Ministerial order which allowed them to sell posts (with a \$4 surcharge) would be pulled. Government changed, and that cancellation was then rescinded. The order was reinstated. They have the funding back now, but had planned to fund Practice Review through a dues increase, which received member support.