

RESEARCH REPORT



A Strategy to Provide Coordination of the Canadian Home Inspection Profession



CMHC—HOME TO CANADIANS

Canada Mortgage and Housing Corporation (CMHC) has been Canada's national housing agency for more than 60 years.

Together with other housing stakeholders, we help ensure that Canada maintains one of the best housing systems in the world. We are committed to helping Canadians access a wide choice of quality, affordable homes, while making vibrant, healthy communities and cities a reality across the country.

For more information, visit our website at [**www.cmhc.ca**](http://www.cmhc.ca)

You can also reach us by phone at 1-800-668-2642
or by fax at 1-800-245-9274.

Outside Canada call 613-748-2003 or fax to 613-748-2016.

Canada Mortgage and Housing Corporation supports the Government of Canada policy on access to information for people with disabilities. If you wish to obtain this publication in alternative formats, call 1-800-668-2642.

**A Strategy to Provide Coordination
of the Canadian
Home Inspection Profession**

**Report from an Advisory Steering Committee
Representing the Canadian Home and Property
Inspection Profession**

June, 1997

Table of Contents of The Report

A.	Introduction	
1.	Preamble	1
2.	The Rationale for Change	3
3.	Definition and Terminology	5
B.	Proposed Structure and Organization	
1.	Proposed Mission Statement and Objectives	7
2.	Conceptual Framework of the National Alliance	9
	– Membership in the National Alliance	10
	– Responsibilities of the Proposed National Alliance	11
	– Structure of the Board of Directors and the Transition Steering Committee	14
3.	Financing the National Alliance	17
	– Budget for the Transition Steering Committee — 12 months	18
4.	Administration Considerations	19
C.	Accreditation and Certification Issues	
1.	Provincial/Regional Accrediting Agencies	20
2.	Certification of the Individual Home Inspector	22
3.	A Proposed Code of Ethical Behaviour	27
D.	Role of the Occupational Analysis	
1.	Rationale and Role of the Analysis	28
	– A Working Definition of the Profession/Occupation	29
2.	Proposed Development Process	31
3.	Applying the Occupational Analysis	35
E.	Education, Training and Performance Standards	
1.	Developing a National Curriculum	36
2.	Assessing and Validating Existing Courses and Programs	37
3.	Developing a National Examination Bank	39
4.	Accrediting/Validating Course Delivery Agents	40
5.	Developing a National Standard of Performance	41
F.	Strategic Relationships	
1.	Expanding the Marketplace (Strategic Relations)	42
G.	Transition Considerations and Workplan	
1.	Building Support	46
H.	Appendices	
1.	Approach to the Development of Minimum National Performance Standards for Home Inspectors	50
2.	An Overview of a Task Analysis	54

A. Introduction

A1. Preamble

In November of 1996, representative members of the Home/Property Inspection profession in Canada convened in Toronto to discuss a long-term strategy for the profession at the national level. At the two-day Strategic Planning Session in November, agreement in principle was reached to further explore the concept of a national strategy to oversee and develop initiatives guiding the future of the Canadian Home Inspection profession. The participants at the session mandated, and provided funding for, an Interim Steering Group (ISG) to further develop the strategies and concepts considered at the Session. The Interim Steering Group was tasked to prepare a concept framework/proposal which outlined approaches relating to the formation of a national 'organization of organizations', and the development of minimum national standards for certification, education and training, and performance standards.

The attached pages provide the resulting concept outline and detailed implementation options governing a national strategy — as presented in the ISG report and as amended and validated by the April Session participants. The report represents the best efforts of leaders of the profession to define a strategy which works in the best interests of the home inspection profession throughout the country.

The report (and associated recommendations) is the result of more than five months of work. The Interim Steering Group spent many hours of conversation on the telephone, many days of meetings removed from offices and homes, and many hours of consultation with others involved in the profession. The Group was assisted in their deliberations by thoughtful and insightful input from representatives of the home/property inspection profession throughout the country.

This report is in keeping with the mandate provided to the Interim Steering Group — to build upon the common ground and spirit developed in the November Session. The report conceptualizes a strategy which can accommodate the interests of all associations and members of the profession throughout the country. As with all things Canadian, some compromise of views is reflected in the document.

We acknowledge that this report represents only one step in an evolving process. The ISG report has now been accepted in principal as a working document by the Advisory Steering Committee — individuals representing the leadership of all Home/Property Inspection Associations in Canada. The report and proposed strategy now require circulation and ratification by members of the profession and Associations throughout the country. Only at that point can there be seen to be a profession-endorsed strategy. Only at that point can implementation plans be put in place.

This report represents the best efforts of profession leaders at defining a strategy which they think might work. We believe that the strategy is based on sound principles and merits fair and open-minded consideration by all members of the profession. We, as many others, believe that the benefits of unifying the profession within the country far outweigh any potential costs. We respectfully submit this report in the hope that it will be a stepping stone towards that unification.

Individuals Involved in the Development of the Report

Participants at Strategic Planning Session Nov. 25-26

Ashdown, Graham, St. Catherines, Ontario	Johnson, John, Saint John, New Brunswick
Brewer, Mike, Mississauga, Ontario	Kindred, Greg, Regina, Saskatchewan
Carson, Alan, Toronto, Ontario	Leech, John, Surrey, B.C.
Carson, Terry, Toronto, Ontario	Lucas, Lloyd, Coquitlam, British Columbia
Chace, John, Maple Ridge, B.C.	Madsen, Moe, St. Albert, Alberta
Clarke, Jeff, Toronto, Ontario	Marshall, Terry, Ottawa, Ontario
Crawford, Bill, London, Ontario	O'Grady, Michael, Baltimore, Ontario
Crewe, Brian, Notre Dame de Perrot, Québec	Robar, Jim, Ottawa, Ontario
Dennis, Bob, Kelowna, B.C.	Rodrigues, Joe, Kirkland, Québec
Dickie, Owen, Oyama, B.C.	Smith, Dewey, Thunder Bay, Ontario
Goddard, Phil, Langley, B.C.	Welby-Solomon, Trevor, Scarborough, Ontario
Healey, John, Halifax, Nova Scotia	Wilson, Paul, Nepean, Ontario
Horsman, Brian, North Bay, Ontario	Wood, Charles, Moncton, New Brunswick

Appointed Members of the Interim Steering Group

Brewer, Mike	Smith, Dewey
Pillar to Post, Mississauga, Ontario	Ontario First Nations Technical Services Services Corporation, Thunder Bay, Ontario
Leech, John	Wilson, Paul
ASTTBC, Surrey, B.C.	Home Inspectors, Nepean, Ontario
Madsen, Moe	
Madsen Technical, St. Albert, Alberta	

Advisory Steering Committee (and Affiliation) April 25-26, 1997

Ashdown, Graham, PACHI	Leech, John, WAPI/ASTTBC
Brewer, Mike, franchisor	Lindsay, Calvin, CAHI (B.C.)
Carson, Alan, independent	Lucas, Lloyd, WAPI
Carson, Terry, OAH	Madsen, Moe, CAHI (Prairie)
Chace, John, Building Official	Marshall, Terry, CMHC
Clarke, Rick, CAHI (Prairie)	O'Grady, Michael, PACHI
Crewe, Brian, CAHI (Québec)	Robar, Jim, CMHC
Dickie, Owen, CAHI (B.C.)	Smith, Dewey, OFNTSC
Goddard, Phil, WAPI	Welby-Solomon, Trevor, PACHI
Janssen, Harry, OAH/CAHI National	Wilson, Paul, OACBI
Lecuyer, Norm, CAHI National	Wood, Charles, CAHI (Atlantic)

A2. The Rationale for Change

At the November Strategic Planning Session, stakeholders from the profession identified a variety of reasons why a coordinated national initiative would serve the best interests of the Canadian Home Inspection profession. Recorded comments included:

The Current Scenario

- There currently exists no single group which reflects all elements of the profession;
- While existing groups appear to share a common goal — to improve the lot of the home inspection industry — there is no mechanism in place allowing the different groups to work together towards that goal;
- There is considerable fragmentation within and between the existing associations representing the profession;
- Existing associations do not represent the entire Home Inspection profession;
- Real membership benefits relating to association membership have not been adequately communicated to all members of the profession;
- There may not be adequate membership nor resources available within any single association to support a sustained national initiative.

Participants at the November Session also identified a series of longer-term goals for the profession. The stated goals, as recorded, included:

The Longer-term Goals

- Develop Home Inspectors into Canada's newest profession;
- Develop a spirit of cooperation among associations and constituent members;
- Develop a system that can provide direction for the industry at the national level while allowing for regional differences;
- Create a system to develop national standards as they might apply to:
 - industry regulation,
 - standards of performance for training,
 - base qualifications for individuals entering the profession.

Finally, the group identified the benefits which might accrue to the profession were these long-term goals attained. The stated benefits included:

The Expected Benefits to the Profession

- Greater market share for certified members of the profession;
- Access to lender/insurer inspections on account of requirements which they have implemented;
- Enhanced awareness of the benefits of a professional inspection — by the consumer, the real estate professional and the lending institutions;
- Increased standardization of practice — competition on a more even playing field;
- Expansion of functions which the profession is recognized as being capable of providing.

Through their deliberations over several months, the report authors had confirmed much of which was expressed at the November Session. The fragmentation within the profession, and the lack of a unified front for the profession, are evident to all. While disruptive, the differences reflect a strong commitment on the part of individuals to their profession. Clearly, it must be recognized that many individuals within all associations share a commitment to improving their profession. The passion which individuals in all associations and organizations feel for their profession has been consistently demonstrated.

What remains lacking is a focusing of that passion toward a common goal which can be shared by all members of the profession throughout the country. The challenge to the profession at this point is to develop a strategy for the future which all members of the profession can support. A strategy which focuses the energies and passions of all members of the profession towards a common goal.

The strategy must be based on providing identifiable and quantifiable benefits to the individual Home Inspector. The strategy must provide the opportunity for that individual to have access to larger and broader markets, and to operate more profitably within those markets. The focus of the strategy needs to be directed to the individuals who will gain something through a coordinated national effort.

The individuals involved in the development of this report strongly believe that considerable benefits can be realized through the development of a strong, coordinated, national initiative. We believe that the profession at large shares our desire to:

- minimize the current battling for turf within the profession — through the development of shared commitment to common principles and goals;
- gain access to expanded markets for Home Inspection services through the development of strategic relations with major national stakeholders;
- recognize and more aggressively promote individuals who have demonstrated that they have the knowledge, skills and ability to provide professional services to the market;
- standardize and enhance the educational opportunities which are available to individuals — both those within and those entering the profession;
- build upon the impressive accomplishments of the profession in the past, to facilitate access to enhanced options for the future.

We believe that unifying the profession around common goals is desired not only by members of the profession, but also by a host of stakeholders in the Canadian housing and financing community. We believe that the profession is capable of coalescing around a common strategy and that the merits of accomplishing that strategy will provide significant benefits to all.

A3. Definition and Terminology

Throughout this report, several terms are used to describe the profession, the proposed National Alliance, elements of the proposed strategy, and the types of services which the profession offers to the Canadian public. The intent of these terms is clarified below:

The "Home Inspection Profession and Home Inspector"

The use of the term Home Inspector is not intended to narrow the definition of the profession. In reality, the term might have been the "Private-sector Building/Property/Home Inspector". It is clear that the profession already performs more than pre-purchase inspections of homes. Many in the profession already provide a broader range of services, including pre-delivery inspections of newly constructed homes, pre-renovation consulting on behalf of homeowners, and Code compliance inspections on behalf of agencies and municipalities. These services also cannot be seen as limited to solely "homes". Inspection services can be extended through to apartment buildings, condominium complexes, properties, and even smaller institutional and commercial buildings. Over the coming years, it is believed that the scope of services being offered by the profession will be significantly broader than that currently being offered.

The Alliance of Canadian Home/Property Inspection Associations

The working title of "An Organization of Organizations" overseeing the development and implementation of a national certification program for Canadian Home Inspectors. The Board of the Alliance is assumed to be responsible for developing the official name.

The Canadian Society of Certified Home Inspectors

This name and acronym (CSCHI) is used to describe the body representing individuals who have gained certification under the national initiative. The name "Canadian Society of Certified Home Inspectors" is simply a working title and will be amended / renamed at the discretion of the Transition Steering Committee. While certification will be performed at the provincial/regional level, it is assumed that a national registry would be put in place.

While from a voting perspective, the National Alliance will be structured as a 'national organization of organizations', over the longer-term that which will be most important to the individual certified members of the profession will be the integrity of the certificate provided to the individual.

As with other professions, it is seen that the individual members of the profession might assume a greater role in decision-making at the Board level. The Board of the Society will need to develop long-term policy in relation to this evolution.

Transition Steering Committee

A duly nominated committee of members of the profession responsible for formation of the National Alliance. The Committee will include representation from all existing Home/Property Inspection Associations, and include other individuals whose views will assist in the formation and structuring of the National Alliance. The Transition Steering Committee might assume responsibility for overseeing the development of the National Task Analysis — a cornerstone of the training and educational components of the certification process.

Accrediting Agencies

Provincial and/or regional organizations responsible for the administration of certification and discipline of members of the profession according to national standards established and maintained by the National Alliance. All agencies responsible for certification of members of the profession will abide by the same set of procedures in relation to the certification process. The Assembly of First Nations would be the only accrediting agency which crosses provincial/regional boundaries — serving the needs of First Nation Territories throughout the country.

Accredited Course Providers

Accredited course providers will include those institutions which have submitted their education and training programs for validation according to the nationally developed minimum course curriculum. Accredited course providers will identify those elements of the national curriculum which their courses pertain to — allowing members of the profession the ability to determine the linkage of the approved courses to their educational requirements as identified in the Occupational Analysis.

Occupational Analysis

The Occupational Analysis Program of Human Resources Development Canada has the following objectives:

- To identify and group the tasks that are performed by skilled workers in particular occupations;
- To identify those tasks which are performed by skilled workers in every province and territory;
- To develop instruments for use in the preparation of inter-provincial standards, examination and curricula for training;
- To facilitate the mobility of trainees and skilled workers in Canada;
- To supply employers and employees, and their associations, industries, training institutions and governments with analyses of the tasks performed in particular occupations.

In the definition used in the following report, the term Occupational Analysis includes ownership skills applied by the profession in the operation of their businesses in a professional manner. As the large majority of members of the profession are both company owners and 'skilled workers', the Occupational Analyses should include an analysis of both ownership, and 'skilled work' elements of the profession.

DACUM

Acronym for "Developing A Curriculum". A tool used by educators in the development of curriculum materials. The process generally employed identifies what the profession does, what they need to know and what skills they require to perform tasks.

Curriculum

Curriculum represents the road map applied to the development of education and training initiatives. Curriculum identifies what learning points are to be taught, what resource materials will be employed and what evaluation tools will be applied to determine that learning has taken place.

B. Proposed Structure and Organization

B1. Proposed Mission Statement and Objectives

The sections below are excerpted from the results of the November Strategic Planning Session. The ISG has not changed the Advisory Committee's stated vision or goals.

Vision

The Canadian Home Inspection profession is committed to earning a position of respect and trust through the provision of excellence in inspection for their clients. The National Alliance will coordinate efforts across the country in support of that vision.

Organizational Objectives

- To elevate the status of the profession in the minds of the consumer, home inspectors, government, and key stakeholders across Canada.
- To establish one recognized body as speaking on behalf of the Canadian private sector home inspection profession at the national level.
- To establish national performance standards for home inspections, a code of ethics and criteria for inspector certification so that the general public can have confidence that all certified Home Inspectors have met the requirements of the national certification process.
- To ensure that inspections comply with that standard throughout Canada.
- To approve, support and coordinate provincial/regional accrediting agencies to administer, certify and provide disciplinary control of private-sector home inspectors.

The following page provides, at a glance, an overview of the strategy being proposed, as ratified at the April Planning Session. The graphic briefly identifies the roles and responsibilities proposed for the National Alliance, the provincial/regional accrediting agencies, and those proposed for certified inspectors.

A detailed discussion of the elements of the proposed strategy follows in the report.

The Proposed Strategy — Who Does What

The Players	Key Responsibilities	What's Involved
<p>1 The National Alliance & Transition Steering Committee</p>	<p>Administration and Financing</p> <p>Accreditation of Regional Accrediting Agencies</p> <p>Education/Training and Performance Standards</p> <p>Strategic Relationships</p>	<ul style="list-style-type: none"> • Develop and maintain national standards • Maintain national membership rolls • Billing and collection of fees • Provide management support for National Board • Develop and manage accreditation criteria • Grant accreditation status • Peer monitoring of compliance with accrediting criteria • Oversee development of National Occupational Analysis • Develop and maintain National Curriculum • Develop and maintain National Exam Bank • Develop National Performance Standards • Validate courses to National Curriculum / approve course deliverers • Coordinate national training as applicable
<p>2 Provincial/Regional Accrediting Agencies</p>	<p>Administration and Financing</p> <p>Certification of Individuals</p> <p>Education and Training</p>	<ul style="list-style-type: none"> • Maintain up-to-date certification registration and candidate status • Collect and account for all fees • Designate representative to sit on National Board • Administer candidate certification/evaluation procedures • Grant certification in relation to national standards • Administer Disciplinary Code • Monitor course availability • Oversee development, as required, of region-specific training
<p>3 Certified Home Inspector</p>	<p>Gain Certification</p> <p>Abide with Code of Ethics</p> <p>Stay Current</p>	<ul style="list-style-type: none"> • Demonstrate the required knowledge, skills and experience for certification • Pay fees (education, examination, renewals) • Conduct business and task professionally • Attend industry update programs (courses, forums, conferences, etc.) to keep up-to-date with industry changes • Broaden skill base as new courses / programs are developed

B2. Conceptual Framework of the National Alliance

The Conceptual Framework of the Alliance being proposed is addressed in the following pages. In simple terms, an Alliance (Organization of Organizations) is being proposed to coordinate, develop, implement and maintain strategies at the national level — which will then be applied at the provincial and regional level by accrediting agencies. As decisions at the Board of the Alliance will be made by provincial representatives, the organization can be seen to support a bottom-up as opposed to a top-down structure. The provinces will jointly determine policy to be applied at the national level. Secondly, as representatives on the Board of the Alliance will be practicing members of the profession, it can be stated that decisions will be made by the profession, on behalf of the profession.

It is assumed that, over time, the national 'organization of organizations' will be transformed into a national 'organization of accrediting agencies'. The term "Alliance" and the name described below, "The Alliance of Canadian Home/Property Inspection Associations (ACHPIA)", are for description purposes only. It is assumed that the Board would need to be involved in the formal naming of the Alliance.

Note: The Alliance will work towards the principle of one accrediting agency in each province/jurisdiction — believing that approach represents the most efficient and logical strategy. In the interim as required, the framework can be structured to accommodate all agencies which have met the nationally established requirements for accreditation status.

The framework also identifies a "Canadian Society of Certified Home Inspectors" under the management of the National Alliance. The Society, in effect, may be no more than a national registry of certified members, or might, as the profession sees fit, evolve into a body which allows certified inspectors a direct voice in the development of national policy affecting their certification.

Introduction

En novembre 1996, les représentants des inspecteurs en bâtiments et en propriétés au Canada ont convenu d'élaborer une stratégie nationale dessinant l'avenir de la profession d'inspecteur en bâtiments au Canada. Une proposition de cadre national a été mise au point par un groupe de travail puis modifiée en avril 1997 par les dirigeants du secteur au cours d'une réunion de validation. La stratégie, ou cadre définitif, qui en découle est présentée dans un rapport du comité directeur consultatif.

Ce rapport est le fruit du travail acharné qu'ont accompli les dirigeants de cette profession pour élaborer une stratégie qui soit au service des inspecteurs en bâtiments d'un bout à l'autre du pays. Le rapport établit les concepts d'une stratégie pouvant répondre aux intérêts de tous les inspecteurs et de leurs associations où qu'ils se trouvent au Canada. Les dirigeants de toutes les associations d'inspecteurs en bâtiments et en propriétés au Canada ont, dans ses grandes lignes, adopté ce rapport en tant que document de travail.

Motifs à l'appui d'un changement

Au cours de la réunion de planification de novembre 1996, les dépositaires d'enjeux ont reconnu l'importance d'établir un mécanisme permettant à tous les groupes ou associations d'inspecteurs en bâtiments de viser des objectifs communs. Les participants à cette réunion ont également dégagé une série d'objectifs à long terme axés sur l'établissement d'un système d'élaboration de normes nationales communes en matière d'accréditation, d'exigences académiques, de formation et de rendement des inspecteurs.

Selon le rapport, l'élaboration d'un solide programme national et d'un barème d'accréditation comporterait certains avantages, dont les suivants : les inspecteurs accrédités pourraient élargir leur marché, accroître leur part du marché et obtenir plus de reconnaissance et de crédibilité de la part des clients.

Dans toutes les associations existantes, bon nombre de membres veulent améliorer leur profession. Le défi à relever consiste à mettre en oeuvre une stratégie qui canalise les énergies de tous les inspecteurs membres d'une association vers la réalisation d'objectifs communs. Selon les auteurs du rapport, l'unification des inspecteurs par la poursuite d'objectifs communs est le souhait que formulent non seulement les membres de cette profession, mais aussi quantité de dépositaires d'enjeux dans le secteur de l'habitation et les établissements financiers du Canada.

Énoncé de mission et objectifs proposés

Vision

Les inspecteurs professionnels en bâtiments du Canada s'engagent à gagner le respect et la confiance de leurs clients par l'excellence des services qu'ils offrent à ces derniers. Pour appuyer cette vision, l'Alliance nationale coordonnera les efforts déployés dans l'ensemble du Canada.

Objectifs organisationnels

- Relever le statut de cette profession dans l'esprit des consommateurs, des inspecteurs en bâtiments, des gouvernements et des principaux dépositaires d'enjeux du Canada;
- Établir un organisme reconnu comme porte-parole national des inspecteurs privés du secteur canadien de l'habitation;
- Établir des normes nationales de rendement en matière d'inspection des bâtiments, un code de déontologie et des critères d'accréditation des inspecteurs afin que le grand public soit certain que tous les inspecteurs en bâtiments accrédités ont satisfait les critères du processus national d'accréditation;
- Veiller à ce que les inspections répondent à ces normes partout au Canada;
- Approuver, soutenir et coordonner les organismes provinciaux et régionaux d'accréditation dans l'administration, l'accréditation et l'application de mesures disciplinaires touchant les inspecteurs privés en bâtiments.

L'Alliance nationale

Pour coordonner et mettre au point, en oeuvre et à jour les stratégies nationales qu'appliqueront les organismes provinciaux et régionaux d'accréditation, on propose l'établissement d'une Alliance nationale (organisme à la tête des divers organismes). Puisque les décisions du conseil d'administration de l'Alliance seront rendues par des représentants provinciaux, la gestion de l'organisation sera démocratique. Les provinces détermineront conjointement les lignes de conduite applicables à l'échelle nationale. Puisque les représentants siégeant au conseil d'administration de l'Alliance seront des inspecteurs en exercice, on peut affirmer que les décisions seront rendues par des inspecteurs au nom de leurs confrères.

Les termes «Alliance» et «Alliance des associations canadiennes des inspecteurs en bâtiments et en propriétés (AACIBP)» ne sont utilisés qu'à titre descriptif.

Responsabilités de l'Alliance nationale

Selon le cadre conceptuel, il incomberait à l'Alliance nationale de surveiller la mise au point et en oeuvre des procédures et des critères appliqués par tous les organismes canadiens d'accréditation. Le travail de l'Alliance serait surtout de nature préliminaire :

- élaboration des critères minimaux d'agrément des organismes provinciaux et régionaux d'accréditation des inspecteurs;
- coordination de la mise au point du ou des programmes nationaux guidant l'élaboration de programmes d'études et de formation et supervision de l'élaboration d'une ou de plusieurs banques nationales d'examens;
- supervision de l'élaboration de normes nationales minimales de rendement et de méthodes de compte rendu guidant le travail des inspecteurs en bâtiments accrédités;
- établissement d'alliances stratégiques avec les dépositaires d'enjeux nationaux dans l'intérêt de ses membres.

Après que les organismes d'accréditation auront été établis et que les procédures d'accréditation à l'échelle provinciale et régionale auront été suivies, l'Alliance jouera un rôle davantage axé sur le soutien :

- coordination des efforts des organismes d'accréditation;
- entretien des alliances stratégiques et établissement de nouvelles alliances;
- validation et approbation des cours de formation d'après le programme national d'études;
- coordination de l'élaboration de nouvelles initiatives de formation demandées par des membres.

Conseil d'administration de l'Alliance nationale

En se fondant sur les travaux du comité directeur de la transition (habilité à mener l'initiative jusqu'à ce que la constitution de l'Alliance soit possible), on établira officiellement la structure de l'Alliance nationale, qu'on prévoit mettre en place au 15 juillet 1998. Le conseil d'administration de l'Alliance nationale comprendra :

1. une personne nommée par chaque organisme administratif régional, provincial ou territorial agréé.
 - Colombie-Britannique
 - Provinces des Prairies
 - Ontario
 - Québec
 - Provinces de l'Atlantique
 - Assemblée des Premières Nations
2. des personnes nommées dans l'intérêt de l'Alliance;
3. trois inspecteurs accrédités (pour offrir des conseils sur les plans commercial, technique et académique).

Financement de l'Alliance

Après que l'Alliance nationale sera devenue fonctionnelle et que les inspecteurs auront été accrédités, le système doit être viable du point de vue financier. Un comité directeur de la transition sera chargé de mettre au point des plans financiers spécifiques pour l'Alliance.

Les droits exigés pour le financement de l'Alliance nationale pourront comprendre les suivants :

Droits de demande d'accréditation : Des droits de demande d'accréditation seront réclamés à tout inspecteur présentant une demande d'accréditation.

Droits de renouvellement annuel : Pour conserver son accréditation et figurer dans le registre officiel, tout inspecteur accrédité devra verser des droits de renouvellement annuel.

Droits d'examen :	Tout demandeur souhaitant subir une ou plusieurs parties de l'examen d'accréditation nationale devra acquitter des droits.
Droits de validation des cours :	Tout dispensateur de cours devra faire valider son ou ses cours par rapport au programme national d'études et à l'analyse des professions.
Droits annuels d'enseignement :	Tout organisme titulaire d'un cours validé devra acquitter des droits annuels de renouvellement pour être autorisé à offrir son cours.

Organismes provinciaux et régionaux d'accréditation

Les organismes provinciaux et régionaux d'accréditation adopteront et appliqueront dans leur territoire les stratégies établies par l'Alliance nationale. Selon le cadre conceptuel, l'Alliance établira un seul organisme d'accréditation par province.

Responsabilités

1. Les organismes d'accréditation seront chargés de l'administration du processus d'accréditation, de l'administration des procédures d'évaluation, du suivi des dossiers auprès des inspecteurs et de la perception des droits.
2. Les organismes d'accréditation approuveront les demandes d'accréditation par l'application des mesures suivantes :
 - administration des procédures d'examen verbal ou écrit permettant l'évaluation des connaissances des demandeurs;
 - administration des procédures permettant l'évaluation des compétences des demandeurs;
 - administration des procédures permettant l'évaluation de l'expérience des demandeurs et de leur capacité de respecter les normes.
3. Les organismes d'accréditation percevront les droits demandés par l'Alliance pour les motifs suivants :
 - renouvellement annuel de l'adhésion;
 - examen et évaluation;
 - mesures disciplinaires.
4. Les organismes d'accréditation tiendront une liste de tous les cours de formation approuvés et offerts dans leur province ou région.
5. Les organismes d'accréditation s'assureront que les inspecteurs accrédités respectent les normes minimales de rendement et le code de déontologie.

Accréditation des inspecteurs en bâtiments

Le travail des participants à la séance de planification d'avril a reposé sur le principe selon lequel les critères nationaux d'accréditation doivent être appliqués uniformément à tous ceux qui veulent être accrédités, y compris les inspecteurs en exercice, par crainte de favoritisme et de subjectivisme. Néanmoins, les inspecteurs en exercice peuvent être dispensés de prouver leurs capacités et leurs compétences si leur expérience dans le domaine est confirmée.

Critères d'accréditation - débutants

1. Avoir réussi un ou plusieurs examens verbaux ou écrits standardisés;
2. Poursuivre, au besoin, des études obligatoires;
3. Réussir des inspections (nous en proposons trois) vérifiées par un pair;
4. Avoir réalisé, preuves à l'appui, jusqu'à 150 inspections ou rapports d'inspection et être évalué par des pairs quant à ses capacités, à son expérience et à son rendement antérieur;
5. Acquitter les droits exigés;
6. S'engager, par la signature d'une entente, à respecter les modalités de l'accréditation.

Critères d'accréditation - inspecteurs chevronnés

Les membres qui feront partie d'une association au 15 juillet 1998 pourront, au cours des douze mois suivant, obtenir une accréditation s'ils répondent aux critères ci-après :

1. Avoir réussi un ou plusieurs examens verbaux ou écrits standardisés ou suivre un cours de recyclage et obtenir au moins la note de passage pour un examen standardisé;
2. Avoir poursuivi, au besoin et avec preuves à l'appui, des études obligatoires;
3. Avoir réalisé, preuves à l'appui, 500 inspections et être reconnu par des pairs quant à ses aptitudes à rédiger des rapports;
4. Acquitter les droits exigés;
5. S'engager, par la signature d'une entente, à respecter les modalités de l'accréditation.

Analyse des professions

On mettra au point une analyse des professions qui servira de fondement à l'établissement des critères relatifs aux connaissances et aux aptitudes des inspecteurs en bâtiments. L'élaboration d'une analyse des professions est un processus permettant de définir :

- l'objectif d'une profession et les diverses fonctions exercées;
- les connaissances nécessaires à l'exercice de ces fonctions;
- les compétences et les habiletés à appliquer dans l'exercice de ces fonctions;
- les tendances (techniques, économiques, politiques, sociales et géographiques) qui se répercutent ou pourraient se répercuter sur le mode de fonctionnement de la profession.

L'élaboration de l'analyse repose sur la participation directe d'un grand nombre d'inspecteurs en exercice de toutes les régions du Canada, dans tous les types d'entreprises et d'exploitations et de divers antécédents académiques et professionnels dans le domaine.

L'analyse des professions constituera l'outil fondamental d'élaboration :

- du programme d'études et de formation;
- des procédures d'examen et d'évaluation;
- des normes de rendement du secteur.

Une analyse distincte des tâches sera nécessaire pour chaque service d'inspection, notamment :

- inspections d'un immeuble précédant son achat;
- inspections précédant la mise en vente d'un logement neuf;
- inspections précédant des rénovations et consultations sur la planification de travaux;
- résolution de problèmes et recherche de défauts;
- inspections rémunérées à l'acte touchant le respect du code du bâtiment.

Programme national d'études

Se fondant sur l'analyse nationale des professions approuvée, on élaborera un programme national d'études minimal. Le programme national d'études représentera l'itinéraire à suivre dans l'élaboration d'initiatives académiques et de formation pour cette profession.

Évaluation et validation des programmes et des cours existants

L'élaboration d'un programme national d'études (d'après l'analyse des professions) permettra, pour la première fois, la mise au point d'un procédé d'évaluation des cours existants et nouveaux. Tous les cours existants seront évalués d'après ce programme national d'études afin de déterminer :

- les éléments ou les tâches du programme national d'études ou de l'analyse des professions couverts par ces cours;
- l'importance accordée par ces cours aux connaissances requises et aux tâches spécifiques;
- les éléments qu'il faudrait ajouter aux cours pour traiter plus à fond les points spécifiques du programme d'études;
- les éléments de cours jugés superflus dans le cadre du programme national d'études;
- l'exactitude et le degré d'actualité du matériel didactique par rapport au programme d'études.

Le procédé d'évaluation des cours peut être confié aux organismes d'accréditation provinciaux ou régionaux ou, si les cours sont offerts dans l'ensemble du Canada, à l'organisme national.

Mise au point d'une banque nationale d'examens

L'analyse nationale des professions et le programme national d'études qui en découlera serviraient également d'outils de création d'une banque nationale d'examens. La banque d'examens servirait

d'outil d'évaluation permettant de déterminer si un candidat a acquis les connaissances voulues pour devenir un inspecteur en bâtiments accrédité.

À l'instar du programme d'études, la banque d'examens devra être divisée compte tenu des fonctions et des tâches indiquées dans l'analyse des professions. Il faudra attribuer un ensemble distinct de questions d'évaluation à chaque fonction (p. ex. commercialisation, électricité, fondations) pour permettre aux examens de porter sur des domaines particuliers aux cours suivis ou sur des domaines plus vastes.

La banque d'examens comprendra diverses possibilités permettant de tester chaque élément du programme d'études en s'assurant qu'il n'y ait pas deux examens semblables. Ainsi, on n'aura pas à craindre que les professeurs adaptent leurs cours de manière à divulguer d'avance les réponses aux examens, ce qui réduira au minimum la fraude. Il faudra établir des mesures précises pour garantir la sécurité de la banque d'examens.

Élaboration de normes nationales de rendement

L'analyse nationale des professions et les analyses connexes des tâches guideront l'élaboration des normes nationales minimales de rendement pour cette profession. Ces normes seront appliquées au rendement des divers types d'inspections pouvant être offerts dans cette profession.

Le rapport du comité consultatif aborde le concept des normes de rendement en se fondant sur les commentaires judicieux des inspecteurs en service. Les membres de ce comité estiment que l'élaboration de normes devrait reposer sur plusieurs principes clés :

- Les normes devraient indiquer ce qui doit être fait et non pas seulement ce qui est présentement fait;
- Les normes devraient viser la prestation de services appréciés des clients et non pas seulement la protection de l'intégrité des inspecteurs;
- Les normes devraient tirer au clair les attentes relatives au rendement des bâtiments, ce qui permettrait aux inspecteurs de formuler des commentaires portant surtout sur les problèmes de rendement des bâtiments.

Expansion du marché (rapports stratégiques)

La capacité de tirer parti des rapports stratégiques établis avec les principaux dépositaires d'enjeux nationaux, comme la SCHL, GE Capital, l'Association canadienne de l'immeuble, l'Association des banquiers canadiens et les ministères et organismes du gouvernement fédéral, rehaussera le titre d'inspecteur accrédité et en décuplera la valeur commerciale. L'établissement de rapports stratégiques à l'échelle nationale et provinciale, lequel attribuera aux inspecteurs accrédités un statut de fournisseur privilégié, accroîtra les occasions d'affaires et offrira une meilleure protection aux consommateurs.

Au cours de la période de transition, les associations existantes et les membres d'associations auront la chance de mettre au point leur plan d'entreprise afin de répondre à l'accroissement des

activités commerciales et de faire face au nouvel environnement concurrentiel dans le secteur de l'inspection des bâtiments.

Intensification du soutien au sein de la profession

Si l'on est d'accord en principe à emprunter la voie proposée, alors le processus d'intensification du soutien au sein de la profession doit être enclenché. Si les membres de cinq groupes de travail sont incapables de transformer une profession, vingt-cinq personnes le sont également, peu importe les postes auxquels on les a dûment nommées. Les membres du CAHI, du WAPI et du PACHI ainsi que les inspecteurs ne faisant pas partie d'une association doivent être mis au courant de la présente initiative et avoir la possibilité de la comprendre et d'y participer. Cette responsabilité incombera manifestement à chaque cadre de ces associations, comme il a été discuté à la réunion d'avril 1997.

À mesure que les avantages de devenir un inspecteur accrédité seront mieux compris et connus, de plus en plus d'inspecteurs dans toutes les régions canadiennes réclameront cette désignation, ce qui aboutira à l'établissement d'un corps hautement formé et professionnel d'inspecteurs privés.

La façon dont les critères d'adhésion aux associations régionales, provinciales et nationales existantes s'intégreront aux critères nationaux de la désignation «inspecteur accrédité» se précisera au cours de la période de transition. L'un des principes fondamentaux de la nouvelle organisation, c'est qu'elle reconnaîtra le travail et la formation accomplis par les membres d'associations existantes.

Les inspecteurs chevronnés souhaitant obtenir le statut d'inspecteur accrédité s'apercevront que leurs vastes connaissances et expérience leur permettra de répondre aux critères. Il faut faire connaître cette réalité à tous les membres d'associations existantes afin d'atténuer l'angoisse surgissant chez une personne qui, soumise à une évaluation, doit répondre à des normes.

Personnes ayant participé à l'élaboration du rapport

Participants à la séance de planification stratégique des 25 et 26 novembre

Ashdown, Graham, St. Catharines, Ontario
Brewer, Mike, Mississauga, Ontario
Carson Alan, Toronto, Ontario
Carson, Terry, Toronto, Ontario
Chace, John, Maple Ridge, C.-B.
Clarke, Jeff, Toronto, Ontario
Crawford, Bill, London, Ontario
Crewe, Brian, Notre-Dame-de-Perrot, Québec
Dennis, Bob, Kelowna, C.-B.
Dickie, Owen, Oyama, C.-B.
Goddard, Phil, Langley, C.-B.
Healey, John, Halifax, Nouvelle-Écosse
Horsman, Brian, North Bay, Ontario

Johnson, John, Saint John, Nouveau-Brunswick
Kindred, Greg, Regina, Saskatchewan
Leech, John, Surrey, C.-B.
Lucas, Lloyd, Coquitlam, C.-B.
Madsen, Moe, St. Albert, Alberta
Marshall, Terry, Ottawa, Ontario
O'Grady, Michael, Baltimore, Ontario
Robar, Jim, Ottawa, Ontario
Rodrigues, Joe, Kirkland, Québec
Smith, Dewey, Thunder Bay, Ontario
Welby-Solomon, Trevor, Scarborough, Ontario
Wilson, Paul, Nepean, Ontario
Wood, Charles, Moncton, Nouveau-Brunswick

Membres nommés au comité directeur intérimaire

Brewer, Mike
Pillar to Post, Mississauga, Ontario

Leech, John
ASTTBC, Surrey, C.-B.

Madsen, Moe
Madsen Technical, St. Albert, Alberta

Smith, Dewey
Ontario First Nations Technical Services
Services Corporation, Thunder Bay, Ontario

Wilson, Paul
Home Inspectors, Nepean, Ontario

Membres du comité directeur consultatif (et affiliation) - 25 et 26 avril 1997

Ashdown, Graham, PACHI
Brewer, Mike, non-adhérent
Carson, Alan, non-adhérent
Carson, Terry, OAH
Chace, John, directeur départemental de la
construction
Clarke, Rick, CAHI (Prairies)
Crewe, Brian, CAHI (Québec)
Dickie, Owen, CAHI (C.-B.)
Goddard, Phil, WAPI
Janssen, Harry, OAH/CAHI National
Lecuyer, Norm, CAHI National

Leech, John, WAPI/ASTTBC
Lindsay, Calvin, CAHI (C.-B.)
Lucal, Lloyd, WAPI
Madsen, Moe, CAHI (Prairies)/CAHI National
Marshall, Terry, SCHL
O'Grady, Michael, PACHI
Robar, Jim, SCHL
Smith, Dewey, OFNTSC
Welby-Solomon, Trevor, PACHI
Wilson, Paul, OACBI
Wood, Charles, CAHI (Atlantique)



National Office

Bureau national

700 Montreal Road
Ottawa ON K1A 0P7
Telephone: (613) 748-2000

700 chemin de Montréal
Ottawa ON K1A 0P7
Téléphone : (613) 748-2000

Puisqu'on prévoit une demande restreinte pour ce document de recherche, seul le résumé a été traduit.

La SCHL fera traduire le document si la demande le justifie.

Pour nous aider à déterminer si la demande justifie que ce rapport soit traduit en français, veuillez remplir la partie ci-dessous et la retourner à l'adresse suivante :

Centre canadien de documentation sur l'habitation
Société canadienne d'hypothèques et de logement
700, chemin Montréal, bureau CI-200
Ottawa (Ontario)
K1A 0P7

Titre du rapport: _____

Je préférerais que ce rapport soit disponible en français.

NOM _____

ADRESSE _____

rue

App.

ville

province

Code postal

No de téléphone () _____

Membership in the National Alliance

Provincial/Regional Accrediting Agencies

1. Membership in the Alliance of Canadian Home/Property Inspection Associations (ACHPIA) shall be provided to any organization or association which has been granted accreditation status by the Alliance. There shall be one accrediting agency established in each province/region/jurisdiction.
2. Affiliate membership in the Alliance shall be provided to any person or organization who demonstrates to the satisfaction of the Board of Directors that, while not qualifying for membership as an accrediting agency, the person or organization is engaged in providing a valuable service to the Alliance or to members of the Canadian Society of Certified Home Inspectors.
3. The Board of Directors of the Alliance shall be responsible for overseeing the start-up formation of the Society representing all nationally certified inspectors, as identified below.

Rights of Certified Inspectors

1. Certification will be conferred on individuals through the provincial/regional accreditation agency. All certified inspectors will become members of the "Canadian Society of Certified Home Inspectors" provided they are members in good standing of their respective accrediting agency. This will entitle/enable members to the following:
 - Right to use the name and identity mark developed for exclusive use of members.
 - Right to be listed in the Official Record of Certified Inspectors — legal record of Certified status.
 - Right to a Certificate, confirming the status of Certified Inspector for the specific period of registration.
 - Right to perform work which is required to be performed by a certified member of the Society.

Responsibilities of the Proposed National Alliance

The Conceptual Framework would require that the National Alliance oversee the development and implementation of procedures and criteria which would be applied by all accrediting agencies throughout the country. The workload of the Alliance will be primarily focused at the front-end:

- developing minimum criteria for accreditation of provincial/regional agencies for certification of individuals;
- coordinating the development of National Curriculum(s) guiding the development and delivery of education and training programs for the profession, and overseeing the development of a National Examination Bank(s);
- overseeing the development of a minimum national standard of performance and reporting procedures guiding the work of certified home inspectors;
- overseeing the negotiation of strategic alliances with national stakeholders to the benefit of members of the Society.

Once the Accreditation Agencies are in place and certification procedures are being implemented at the provincial/regional level, the Alliance will assume more of a maintenance role:

- coordinating efforts between the accreditation agencies;
- maintaining strategic alliances and initiating new alliances;
- validating and approving educational courses to the National Curriculum;
- coordinating the development of new educational initiatives required by members of the profession.

The organization chart included on the following page provides an overview of the proposed structure of the Alliance. The chart accommodates a Transition Steering Committee who would assume responsibility for the final formation of the Alliance. As required, this Committee would be responsible for resolving any outstanding differences between member Associations and/or agencies.

Details relating to the proposed responsibilities and structure of the Board and Committees are provided in following sections. The report includes a proposed workplan governing the implementation of these responsibilities in Section H of the report.

Conceptual Organizational Chart The National Alliance

Board of Directors

Primary Responsibilities

- Overall responsibility for the initiative
- Responsibility for maintaining/monitoring the vision
- Liaison with other industry stakeholders and regulators
- Liaison with funding partners
- Represent profession at federal level
- Strategic planning
- Oversee staff/sub-committee activities

Committed to the Expressed Vision of the Canadian Private-sector Building/Home Inspection Profession

Administrative Capacity (as required)

Primary Responsibilities

- Perform required day-to-day functions under direction of Transition Steering Committee and Board

Transition Steering Committee

Primary Responsibilities

- Oversee the transfer of responsibility from the Advisory Committee through to the formal constitution of the National Alliance
- Lay the groundwork for/formalize strategic relationships
- Confirm acceptance of financial plan with affected associations
- Put in place interim administrative capacity, as required

Composed of Representatives from All Existing Home/Property Inspector Associations

Accreditation and Certification Committee

Primary Responsibilities

- Develop and oversee procedures for accreditation of certifying bodies
- Develop administrative procedures to be followed by accrediting agencies (registry, funding and financing, disciplinary standards, etc.)
- Develop procedures for certifying skill, experience and ability of candidate members through monitored inspections and peer validation

Strategic Liaison and Communications Committee

Primary Responsibilities

- Develop relations with key industry stakeholders
- Develop relations with federal agencies
- Develop relations with other potential funding partners
- Liaise with Building Official Associations
- Develop and maintain communication strategies to accrediting agencies and certified members
- Oversee development of promotional strategies and campaigns

Education and Training Committee

Primary Responsibilities

- Oversee development and management of National Curriculum for all task functions
- Oversee development of National Examination Bank based on Occupational Analysis and specific Task Analyses
- Oversee development of performance standards
- Develop criteria for evaluation and validation of education and training programs
- Develop national standards for course delivery agents
- Oversee development of annual industry update training initiatives

Specific Responsibilities of the National Alliance

1. Establish and maintain minimum criteria for approval of provincial/regional accreditation agencies.
2. Establish and maintain minimum national inspector certification criteria for adoption at the provincial/regional level.
3. Establish and maintain all inspector certification areas of practice for adoption at the provincial/regional level (i.e., pre-purchase, pre-delivery, pre-renovation consulting, etc.).
4. Establish and maintain a National Curriculum and criteria for validation, approval and updating of training courses for adoption at the provincial/regional level.
5. Establish and maintain minimum inspector examination and assessment procedures for all designations for adoption at the provincial/regional level.
6. Establish and maintain criteria for approval of training course delivery agents for adoption at the provincial/regional level.
7. Establish and manage strategic relationships with federal agencies, and with national representative bodies from the lending, real estate, appraisal, legal and building official communities.
8. Establish and maintain minimum national Standards of Inspection Performance and Reporting requirements for adoption at the provincial/regional level.
9. Establish and maintain a Code of Ethics for adoption at the provincial/regional level.
10. Establish and maintain a Code of Disciplinary Action for adoption at the provincial/regional level.
11. Promote and protect the national certification trade mark and promote the Official Record of Certified Inspectors.
12. Represent at the national level, and in cooperation with accrediting agencies, provide services for certified inspectors (apprentices must be accommodated).
13. Manage national administrative duties and finances. Financial contributions will only be accepted if deemed to be in the best interest of the home inspection profession — as determined by the National Alliance.
14. Facilitate and coordinate, at the national level, the sharing of information, educational programs and other initiatives being developed at the provincial/regional level, to minimize duplication and to optimize resources within the profession.

Structure of the Board of Directors and the Transition Steering Committee

The Board of Directors

The proposed Board of Directors of the National Alliance will include representatives from all approved accreditation agencies. Clearly, this Board cannot be duly constituted before the procedures for approval of accreditation agencies have been adopted and implemented.

Composition of the Transition Steering Committee

In the interim, it is proposed that a Transition Steering Committee be formally empowered to direct the proposed initiative through to a point at which formal constitution of the Alliance is possible.

At the April Session, the following agreement was reached:

- The Transition Steering Committee would be formed with representation from the following agencies:

WAPI/ASTTBC	CAHI (B.C.)
CAHI (Prairie)	PACHI
OAH	CAHI (P.Q.)
CAHI (Atlantic)	Assembly of First Nations
- By July 15, 1997, all agencies would signify their participation on the Transition Steering Committee through the appointment of an individual representative and through a demonstration of legal consideration with a cheque for \$_____.
- If any association/agency does not signify their approval to proceed as stated above, by July 15, 1997, the national initiative will be deemed to have failed.
- The Transition Steering Committee will include up to five non-voting members, including two representatives from the Interim Steering Group and up to three members of the profession from across the country as deemed beneficial by the voting members of the Committee.
- Decision-making at the Transition Steering Committee will be based on a consensus model — requiring unanimity among the voting members.
- The Transition Steering Committee shall mature into the Board of the National Alliance at that point in time when ALL regional/provincial Accrediting Agencies can be officially accredited. [Target date: July 15, 1998].

Composition of the Board of Directors of the National Alliance

Based on the work of the Transition Steering Committee, the National Alliance will be formally structured and in place by a target date of July 15th, 1998. The proposed Board of Directors of the Alliance will include:

1. One person appointed by each accredited provincial/regional/jurisdictional administrative body. This number is likely to increase over time as additional provincial agencies are structured, but at a minimum would include representation from:
 - British Columbia
 - The Prairie Provinces
 - Ontario
 - Québec
 - The Atlantic Provinces
 - The Assembly of First Nations
2. At their discretion, the voting members of the board may consider the nomination of others to the Board in a non-voting or affiliate capacity. These additional board members might include other practitioners or industry stakeholders.

Structure of the Board

1. At each annual meeting of the Alliance, the Board shall elect from among the Directors, a Chair, Vice-chair, Secretary and Treasurer.
2. The term of office for all Directors shall be for two years, beginning at adjournment of the annual meeting and ending at adjournment of the second subsequent annual meeting. Continuity within the Board shall be provided through staggering of terms on the Board.
3. Decision making at the National Board will be based on a consensus model — requiring unanimity among the voting members.
4. After due process, Directors may be removed by consensus agreement by the voting members of the Board. Upon removal of a Director, a replacement must be requested from the organization which appointed the removed Director, or in the case of appointments by the Board, the Board shall be immediately required to appoint another Director.
5. Persons appointed by the Board can be eligible for reappointment.

Execution of the Board Duties

1. The Board shall strive to achieve the stated mission/vision and objectives of the Organization.
2. The Board shall manage the business and affairs of the Alliance and of the Society.
3. The Board shall produce an annual budget and annual financial statement available for review by any member. The Board shall establish minimum fees to be paid for membership in the Society.
4. The Board may meet at any time and place in person or other form of electronic conferencing at the call of the Chair or a quorum of Directors with sufficient written notice.
5. Quorum for all meetings of the Board shall be 50% of the number of Directors plus 2.
6. Decisions of the Board will be based on a consensus model, thereby requiring unanimous approval.
7. To assist in the discharge of its duties the Board may establish committees from time to time to bring forth recommendations. The chair of each committee must be a Director. Any person can be appointed by the Board to sit as a member of the committee. The Board of Directors is not bound by committee decisions.

Proposed Committees

- Certification and Accreditation
- Educational Programming and Assessment
- Strategic Relationships, Government Liaison and Marketing

Proposed responsibilities of the Committees are identified on page 12.

B3. Financing the National Alliance

Once the National Alliance is operational and inspectors are being certified, it must be financially viable. The Transition Steering Committee will be responsible for developing specific financial plans for the Alliance.

To accomplish financial viability, the fees charged can follow several principles (amounts identified are conceptual):

Application Fee

- Each applicant will pay an application fee when applying for recognition as a Certified Inspector. This fee will be levied and collected by the provincial/regional accrediting agencies. The fee will be composed of 3 parts:
 - a national fee [\$100 - \$200];
 - a fee to cover processing costs incurred by the accrediting agency; and
 - an administration fee to cover the accrediting agency's on-going administrative costs of listing and tracking the inspector.

Annual Renewal Fee

- Each Certified Inspector will be required to pay an annual renewal fee to maintain certification and listing in the official record. This fee will be levied and collected by the provincial/regional accrediting agencies. The fee will be composed of 2 parts:
 - a national fee [\$50 - \$100];
 - a fee to cover the accrediting agency's on-going administrative costs of listing and tracking the inspector.

Examination Fee

- Each applicant who wishes to challenge part(s) of the national certification exam shall pay a fee. This fee will be levied and collected by the provincial/regional accrediting agencies. This fee will be composed of 2 parts:
 - a national fee [\$25 - \$50];
 - a fee to cover the accrediting agency's administrative costs of invigilating the exam(s), marking the exam(s) and recording the marks.
- Members of CAHI, PACHI, WAPI who are in good standing will/may have the national fee waived when they challenge the national exam.

NOTE: The national exam will cover all areas as identified by the Occupational Analysis and may be challenged as a series of smaller sections that reflect general areas of the curriculum (i.e., electrical, basements, heating, windows, report writing, defect recognition, etc.). The total examination fee, inclusive of national and accrediting agency fee components, can be pro-rated to reflect that portion of the full exam that the smaller section covers.

Course Validation Fee

- Each course provider will be required to submit their course(s) for validation against the National Curriculum/Occupational Analysis. This fee will be levied and collected by the National Alliance or by the provincial/regional accreditation agency.
 - a fee based on the amount of the curriculum being covered by the course (i.e. if the national curriculum includes 200 elements and a proposed course covers 20 of those elements, the fee would be based on 10% [example: \$20/element validated]).

Annual Course Fee

- The owner of each validated course would be required to pay an annual renewal fee to be able to offer the course. This process would allow for course updates to be required/allowed as the profession evolves and training needs are refined. This fee would be levied and collected by the national organization (or by the provincial/regional accreditation agency) and would be a percentage of the original course validation fee.

Budget for the Transition Steering Committee — 12 months

To establish the Transition Steering Committee, and provide funding support for the first 6 months, funds need to be committed by related parties. The cost of supporting the Transition Steering Committee need not be excessive as the planning and administrative functions are limited and can mostly be handled by volunteer committee members working together by telephone.

The desire to keep the costs to a minimum in the transition stage suggests a responsible approach to the process and provides a means for supporters/investors to gauge progress. Supporters/investors should be more prepared to support these initiatives over time as they become more closely aligned and have direct influence/control over the directions and actions.

Twelve months: July 1997 - July 1998 (Note: Conceptual only)

Revenue

Industry Contributions		
• CAHI	10,000	
• PACHI	5,000	
• WAPI	5,000	
Other Stakeholder Contributions		
• CMHC	10,000	
• Canadian Bankers' Association/CREA	10,000	
		\$ 40,000

Expenses

Communications		
• telephone	5,000	
• mail/courier	1,000	
Meetings		
• travel, accommodation, meeting expenses	14,000	
Administration		
• sub-contracts/staff	<u>20,000</u>	
		<u>\$40,000</u>

Revenue less expenses

\$ 0

(Budgeting continued)

The above budget does not cover the costs of major project initiatives such as the development of the Occupational Analysis or the National Curriculum. The costs of some of these projects will require the support of outside sources such as Human Resources Canada or other major supporters. The curriculum development process has already been initiated by SAIT which can provide a major time [and cost] saving if this material can be integrated within the requirements of the national Occupational Analysis.

As the certification initiative continues to move toward the stated objectives and goals, the cost of moving the National Alliance to the next step must be confirmed and funding secured. Funding should be supportable if committee progress is steady and the transition board works efficiently and cooperatively. Investors/stakeholders will be able to monitor progress and provide funding in step with the needs of the evolving organization.

The overall rate of progress will determine the need for financial support. The first Certified Inspectors could be through the process by the summer of 1998 and funding from their application and examination fees would be utilized to support the National Alliance. As the national certification program becomes a viable organization during the next months and years, funding requirements from the stakeholders will be reduced to zero.

B4. Administration Considerations

The Transition Steering Committee and Board of Directors of the Alliance will both need to consider what administrative support will be required based on the level of volunteer commitment and on the degree of sharing of administrative support existing within already established organizations and associations.

In either case, it is likely that some costs will be incurred in relation to performing the management and administration services required of both the Transition Steering Committee and the Alliance. It is unlikely that a full-time staff position would need to be filled, assuming the active involvement of members of the Transition Steering Committee and/or Alliance. However, a part-time position, or the services of an association management firm might be required, unless the administrative functions were absorbed by one of the existing associations and/or organizations.

C. Accreditation and Certification Issues

C1. Provincial/Regional Accrediting Agencies

Responsibilities

1. Accrediting Agencies will assume responsibility for administering the certification process, administering assessment procedures, keeping track of people, and collecting fees. It is understood that accrediting agencies will follow the minimum national policies in the development of their respective policies.
2. Accrediting Agencies will approve individuals for certification through administration of the following measures:
 - administering of written or oral examination procedures to assess applicant knowledge;
 - administering of procedures for evaluation of 'mock' inspections to assess applicant skills; and
 - administering of peer review procedures to evaluate applicant experience and ability to comply with standards.
3. Accrediting Agencies will collect prescribed fees as required by the Alliance for such items as:
 - annual membership renewals;
 - examination/assessment fees;
 - disciplinary penalties.
4. Accrediting Agencies will maintain a current listing of all approved educational courses available in the province/region in which the organization is active and the names and contact information of the persons/organizations that the candidate must contact for information or enrollment in the courses.
5. Accrediting Agencies will enforce compliance of members with minimum standards of performance and with the Code of Ethical Behaviour.
6. Accrediting Agencies will comply with national criteria relating to ethical behaviour.

Procedures for Approving Accrediting Agencies Applying to Issue Certified Inspector Status

1. Based on acceptance of the final plan developed by the Transition Steering Committee, accrediting bodies will be established in each Province or Region. "
2. Organization annually appoints one person, who is a certified inspector, to sit on the Board of the National Alliance.

Certification Responsibilities

1. Accredited organization administers examination/assessment process for candidates who have applied through the organization.
2. Accredited organization maintains listing of persons who have been certified through the organization.
3. Accredited organization maintains listing of the people who are working toward certification through the organization and credits they have earned.
4. Accredited organization ensures that required education courses are available to candidates.
5. Accredited organization ensures that options are available for monitored inspections and peer review of qualifications for candidate members.
6. Accredited organization ensures that procedures are in place to review candidate experience and abilities.

C2. Certification of the Individual Home Inspector

Participants at the April Planning Session have worked from the perspective that certification criteria must be evenly and equally applied to all members of the profession seeking membership in, and recognition by, the Society. To maintain the integrity of the process, we believe that the existing members of the profession must demonstrate that they have the same knowledge, skills and abilities as will be required of others seeking certification. The certification procedure must be equally applied to all prospective members of the Society to eliminate concerns and criticism relating to arbitrariness and favouritism.

It is assumed that existing members of the profession can, however, be exempted from certification requirements relating to proven skills and ability — based on validated experience in the marketplace.

Criteria for Certification of Inspectors — Entry Level

Candidates must have proven that they have passed minimum national standards relating to **knowledge, skill, experience and ability** to operate within the Code of Ethics. Specifically, inspectors will:

- Have successfully passed all assessment procedures for the designation requested, including:
 1. Attaining a passing grade (minimum 75-80% of each section) on **standardized examination(s)** administered in written or oral format.
 - Individuals will need to understand alternatives to written examination which may be put in place. The authors believe it important to allow alternatives to the written exam to those individuals who have mental blocks about examinations.
 2. As required, **attend mandatory educational courses.**
 - The authors have not specifically identified requirements for mandatory courses. It may be, however, that the profession would want to require attendance at a Defect Recognition Course and a Report Writing Course. Of importance, if these, or any other courses are deemed mandatory, all inspectors (existing and candidate) will be required to provide proof of attendance as part of the certification procedures.

3. Successful performance of **monitored inspections** (proposed 3) with process, findings and reporting assessed by a peer.
 4. Proof of performance of 150 inspections/reports and an assessment by peers to determine adequacy/capacity of the candidate and their track record/experience.
 - There may be a need to assess candidate performance prior to attaining the required 150 inspections authors have not specifically identified requirements for mandatory courses. This requirement might be put in place to provide enhanced consumer protection — ensuring that no individual repeats errors on 150 consumers. Some intermediate check and balance (after 25 inspections) might be considered.
 - The Transition Steering Committee will need to develop procedures which represent a balance between due diligence and practicality in relation to assessment of candidate members.
- Have paid the prescribed fees.
 - Have signed an agreement to comply with the terms and conditions of certification:
 - to abide by the code of conduct;
 - to abide by the standards of inspection performance;
 - to abide by the standards of reporting;
 - to work within the approved scope of work for the designation;
 - to continually upgrade professional knowledge and skills.

Criteria for Certification of Inspectors — Experienced Professionals

Members of the profession with considerable experience who's field performance has been validated by their peers will not be required to undergo assessment of their ability and skills. This will be applicable to members of existing Associations who have completed a minimum of 500 inspections, and who's report writing abilities have been reviewed and validated by a peer group.

Note: The Transition Steering Committee will need to develop procedures for dealing with certification of experienced individuals (more than 500 inspections) who have not joined an existing Association.

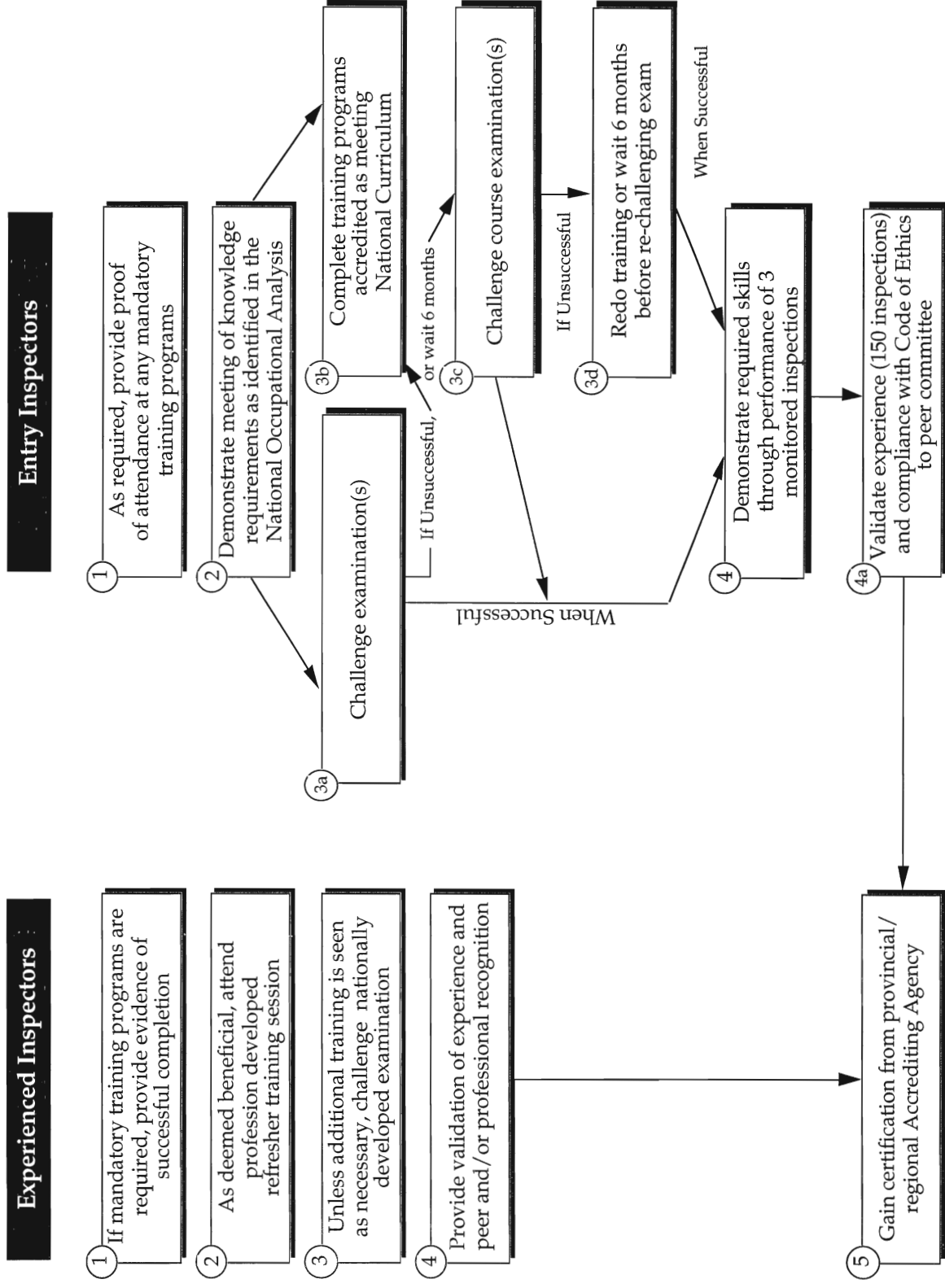
Members of existing Associations on record as of July 15, 1998, will be provided a 12-month window in which they can gain certification by meeting the requirements identified below.

Specifically, inspectors will;

- Have successfully passed all assessment procedures for the designation requested, including:
 1. Attaining a passing grade (minimum 75-80% of each section) on **standardized examination**(s) administered in written or oral format;
or
Attend an update course and attain a passing grade on a standardized examination.
 2. As required, **show proof of attendance at mandatory educational courses.**
 3. Provide proof of performance of 500 inspections and peer acceptance of report writing skills.
- Have paid the prescribed fees.
- Have signed an agreement to comply with the terms and conditions of certification:
 - to abide by the code of conduct;
 - to abide by the standards of inspection performance;
 - to abide by the standards of reporting;
 - to work within the approved scope of work for the designation;
 - to continually upgrade professional knowledge and skills.

The chart on the following page presents in graphic form the certification procedures as they might apply to existing and candidate members of the profession.

Gaining Certification



Application/Certification Procedure for Persons Wanting CSCHI Certified Inspector Status

1. Person wishes to gain CSCHI nationally Certified Inspector status.
2. Person contacts provincial/regional accreditation organization for criteria and process information.
3. Person enrolls in the courses as deemed necessary by the person or as identified as being mandatory by the National Alliance (course fee required — course fees may vary depending on course delivery group/organization).
 - For current members of existing inspector associations, the training and experience each has received will probably propel members directly to candidate examination and assessment.
4. When ready, the candidate submits to examination(s) and assessment procedures (fee required).
 - A fee abatement program (limited time period) may be implemented for members of existing inspector associations.
 - If elements of the examination are not successfully passed, candidates may be required to attend educational courses on those elements of the Curriculum. Alternatively, the procedures might require that the candidate be forced to wait a prescribed time period (6 months) prior to re-challenging those elements of the examination. In both cases, the intent is to promote individuals who do not have the required knowledge to attend education and training programs.
 - If during the course of the three monitored inspections, it is deemed that the individual does not possess the required skills, additional inspections can be required by the accrediting agency.
 - If after submission of 150 reports and/or a dissertation, the accrediting agency deems the candidate to be lacking in skills, it can require further validation from the candidate.
5. If successful, the candidate can apply for certification by filling out the appropriate application forms, paying the prescribed fees and signing the agreement to abide by the terms and conditions of Society membership (fee required).
 - *A fee abatement program (limited time period) may be implemented for members of existing inspector associations.*
6. Society considers candidates application and, if in order, grants national certification status and membership in the Canadian Society of Certified Home Inspectors.
7. Certified Inspector (CSCHI member) employs identity mark and benefits from strategic relationships to enhance business activity.

C3. A Proposed Code of Ethical Behaviour

The actions of the Members of the Society will be governed by a minimum national Code of Ethical Behaviour — as adopted by provincial accrediting agencies. The following represents a first draft for consideration by the profession.

Members of the Society of Canadian Home Inspectors shall be guided by principles of honesty, integrity, impartiality, courtesy and professionalism in the manner in which they operate their businesses, conduct their work, and deal with their clients.

Members of the Society will discharge their duties with fidelity to the public, to their clients and with fairness and impartiality to all. Members shall make every effort to uphold, maintain and improve the professional integrity, reputation and practice of the home inspection profession.

Members will act co-operatively in their dealings with other members of the Society. Members will not intentionally injure the reputation or business of other members of the Society, nor other practitioners.

Members of the Society will uphold the honour and dignity of their profession. Members will avoid any real or apparent conflict of interest which might affect the quality or results of their inspection work. Members will not provide references to individuals and/or businesses who would profit from repair work. Members will not use the home inspection as a vehicle for obtaining any additional work in another field.

Members of the Society shall ensure that written documentation of their observations is accurate and understandable to the client. Members shall not provide opinions on building science issues of which they do not have adequate knowledge or training. Members will express an opinion only when it is founded on practical experience and honest conviction.

Members of the Society will not disclose any information concerning the results of the inspection without the approval of the client. Members will not accept compensation from more than one party for the same service unless approved by the interested parties.

Members of the Society will not state and will discourage others from stating comments with respect to home inspections which are untrue, unfair or exaggerated.

Members will uphold the principle of adequate compensation for the work which they perform.

Members will maintain proficiency and competence through participating in continuing education and through participation in information sharing initiatives for professional development of fellow members.

Members of the Society will report violations of this Code, especially in relation to unprofessional or dishonest conduct on the part of other members of the Society.

D. Role of the Occupational Analysis

D1. Rationale and Role of the Analysis

An Occupational Analysis is a process by which, for any given occupation, one defines:

- What the occupation does — what are the various functions performed;
- What one needs to know in order to perform those functions;
- What skills/abilities need to be applied in the performance of those functions; and
- Trends (technological, economical, political social and geographic) which affect (or might affect) how the occupation operates.

The development of a National Occupation Analysis accommodates a process wherein members of the profession/occupation from across the country identify what they should be doing, what they should know, and what skills they should be able to perform. The development of the Analysis is based on direct input from a large number of members of the profession representing all regions of the country, all types of companies/operations, and representing the different education and experience backgrounds found in members of the profession. The process also involves direct consultation with members of the profession in all regions of the country. The process is designed to ensure that the Analysis is driven by members of the profession — for members of the profession.

As discussed later, the Occupational Analysis will serve as a fundamental tool/ a cornerstone to the development of nationally adopted:

- Education and training Curriculum;
- Examinations and evaluation procedures; and
- Industry developed standards of performance.

The Analysis is premised on a definition of that occupation — identifying the scope of the Analysis. We have taken an approach to a definition of the Occupation which is broad — accommodating that which the profession does within their offices as well as within houses being inspected. The definition suggests that the Home Inspector is a business person who may offer a variety of inspection related services. Within the scope of the business, the Home Inspector must plan, manage and monitor company operations in order to ensure the financial and legal stability of the company. The Home Inspector must also manage the work/tasks being conducted by the company — ensuring that the functions are being professionally performed, either by him/herself or by hired staff.

A working definition which can be applied to the development of the Occupational Analysis is included below. The definition needs to be considered, amended, revised and approved by a broad segment of the profession — prior to commencement of the Analysis. We trust that the draft definition will serve as a catalyst to begin the process.

Further discussion relating to the structure and development of an Occupation Analysis for the Home Inspector is provided in Appendix A.

A Working Definition of the Profession/Occupation

The Canadian Home Inspector is a professional providing advice and information to his/her clients about the condition of housing and/or property. The Inspector applies his/her knowledge, skill and experience in the assessment of the condition of the house, building or property being inspected.

The Home Inspector is an individual who operates his/her business in a professional and profitable manner, who ensures that inspections performed by the company meet minimum national standards, who manages the company in a manner which provides excellent service to its clients, and who operates the company in a manner which represents the professional integrity, reputation and practice of the Home Inspection industry.

The Home Inspector manages a company which may perform any of the following services:

- Pre-purchase inspections within the framework of a real estate transaction;
- Pre-delivery inspections on newly constructed houses;
- Pre-renovation inspections and project planning consultation with homeowners;
- Problem-solving and trouble-shooting consultation with existing homeowners;
- Fee-for-service Code compliance inspections for agencies and jurisdictions.

The Home Inspector ensures that all personnel providing inspection services on behalf of the company have received the required education, skills development and on-the-job training required in meeting profession-established certification criteria. The Home Inspector ensures that company personnel do not perform tasks, nor comment on technical issues, for which they are unqualified.

The functions required of the owner of a company performing inspections are those which must be performed to optimize the likelihood of success of the company — regardless of the types of inspection services being offered by the company. The owner of the company is the individual who establishes a vision for the company, determines the performance standards by which the company operates, provides equity to allow the company to operate, and who manages the people working within the company. The owner(s) assumes all risk and liabilities for work being performed by the company.

The Home Inspector is a manager who:

- Plans for the growth of the company;
- Manages all aspects of the operations of the company;
- Monitors the performance of the company in relation to the plans; and
- Revises company plans as required to improve company performance.

In performing these functions, the Home Inspector possesses and applies a wide range of knowledge, abilities and skills to:

- Define the company goals, and chart a plan by which those goals can be attained;
- Develop, implement and manage a marketing plan for the company;
- Develop and manage annual and long-term financial plans for the company;
- Manage all work being performed by the company — ensuring consistency in meeting of company standards;
- Manage the company's staff — ensuring that staff are fully trained and kept abreast of industry developments;
- Manage the company's client relations and client service procedures;
- Manage the potential liability of the company;
- Monitor company performance and revises company plans in a manner which accommodates continuous and on-going improvement.

Task Analyses

For each inspection service which the company provides, a separate task analysis would be required. The Task Analysis identifies the functions, tasks and required competencies governing the work to be performed. The Task Analysis serves as the basis for defining the job, as the foundation for the development of education and training programs, and as the measure by which performance can be monitored and assessed. Separate Task Analyses would be required for:

- Pre-purchase inspections within the framework of a real estate transaction;
- Pre-delivery inspections on newly constructed houses;
- Pre-renovation inspections and project planning consultation with homeowners;
- Problem-solving and trouble shooting consultation with existing homeowners;
- Fee-for-service Code compliance inspections for agencies and jurisdictions.

Clearly, much of the required knowledge and skills are transportable from one Task Analysis to another. The Southern Alberta Institute of Technology (SAIT), in conjunction with CAHI and The Alberta Real Estate Foundation, has performed a DACUM/Task Analysis concentrating on the **Pre-Purchase Inspection Task**. This important ground-breaking work can serve as a model for the development of Task Analyses relating to other functions which the profession might be performing.

We recommend that the SAIT DACUM be integrated into the National Occupational Analysis and be regionally validated. Furthermore, we recommend that specific Task Analyses be developed over time for other functions/services which the profession performs — in order to guide the development of education programming and standards of performance governing the work.

D2. Proposed Development Process

The following page illustrates in concept the proposed plan for development of the National Occupational Analysis. The Transition Steering Committee may want to entertain other models for the development of the National Analysis.

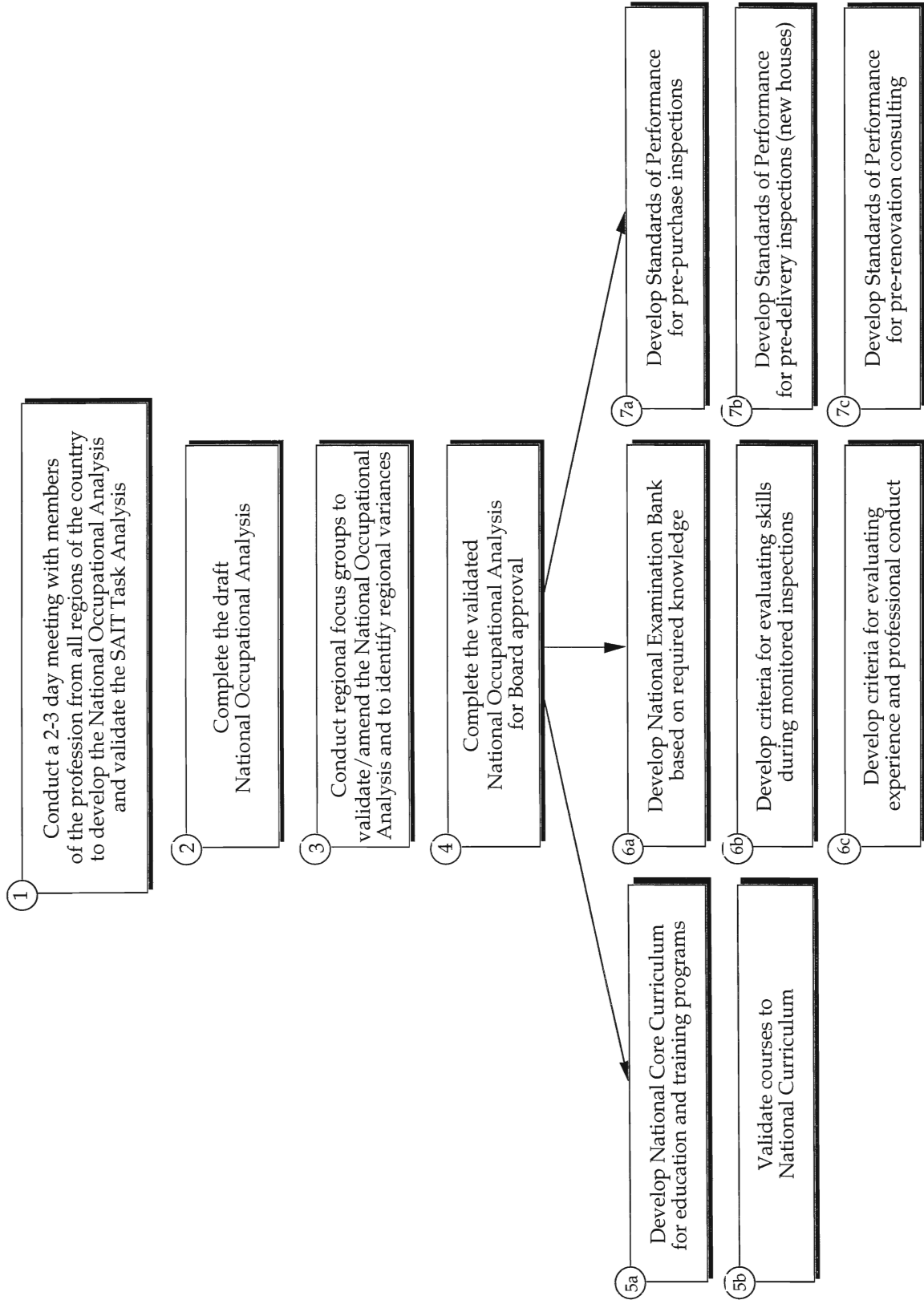
The plan is based on formal procedures as required by the Occupational Analysis and Requirements Program of the Occupational Standards Division of Human Resources Canada (HRDC) — resulting in the formal recognition by HRDC of the Home Inspection Occupation.

The proposed development plan is premised on several factors, including:

- Completing the Analysis within the shortest time period possible without compromising the validity of the Analysis and Validation;
- Minimizing duplication of work by building on the Task Analysis work performed by SAIT and CAHI;
- Minimizing resources required in the development of the Analysis;
- Ensuring that a minimum of 60 members of the profession are directly (in person) involved in the development and regional validation of the Analysis and that all members of the profession are provided the opportunity to comment on the Analysis.

The Interim Steering Group has conducted preliminary discussions with HRDC relating to the development of the Analysis. HRDC has expressed an interest in supporting the profession in the initiative. The plan is premised on HRDC providing funding at a level of that of the profession — acknowledging the investment in time of the many members of the profession who need to be involved in the development of the Analysis.

Developing a National Occupational Analysis



The proposed plan involves several separate steps, including:

1. ***Conduct a national focus group to develop the draft Analysis***
Assemble a group of leaders of the profession from all regions of the country for a 3-day focus group. Over the course of the session, develop all aspects of the Occupational Analysis, and review the SAIT Pre-purchase Task Analysis for adoption within the National Analysis. The session would lead to the creation of a Draft National Occupational Analysis.
2. ***Conduct regional focus groups to validate the draft Analysis***
Assemble 8-12 Home Inspectors in each region to review, amend and validate the National Draft. Over the course of each session, identify specific regional variances which would need to be accommodated in the Analysis. Session would be conducted over the course of one-day in each of the following regions:
 - British Columbia
 - Prairie Provinces
 - Ontario
 - Québec, and
 - The Atlantic Region

Participants would receive in advance of the focus groups the Draft National Analysis for review. Each session would result in a report, identifying proposed changes to the National Analysis and specific regional variances and additions to the Analysis.

3. ***Revise the National Occupational Analysis***
Based on the regional focus groups, revise the National Occupational Analysis to reflect profession input. Integrate region-specific variances, as applicable.
4. ***Circulate completed Occupational Analysis to all Associations and potential Accrediting Agencies for approval***
Circulate the Analysis to the membership of all Associations for final validation. As required, integrate changes.
5. ***Have Analysis formally accepted/adopted by the Board of the National Alliance***
Submit the completed Occupational Analysis to the Board of the Alliance for formal adoption.

Budgeting the Proposed Plan in Concept

Expenses:	National focus group (15 participants)		20,000
	participant travel	5,000	
	accommodation/meals	6,000	
	session costs	1,000	
	facilitation/reporting/complete draft	7,000	
	expenses (printing, distribution)	1,000	
	Regional focus group (5)		8,000
	travel	2,500	
	accommodation/meals/session costs	2,000	
	facilitation/reporting	3,500	
	Completion of Report		5,000
	drafting	3,000	
	expenses (printing, distribution)	2,000	
	Project Management (The Alliance)		10,000
	Required Investment from HRDC (cash)		\$43,000
	Industry Investment (in kind)		\$63,750
	15 @ 3.5 days	52.5 days	
	50 @ 1.5 days	75 days	
		127.5 @ average per diem rate of \$500	

D3. Applying the Occupational Analysis

Once completed, validated and adopted by the National Alliance, the Occupational Analysis will serve as a stepping stone to several essential tasks which the National Alliance will manage.

The completed National Occupational Analysis will **guide the development of a minimum national curriculum** for educational programming. Based on the clarification of what the occupation does (or should do), what it needs to know and what skills it should be capable of performing, specific curriculum can be developed.

The completed National Occupational Analysis will **guide the development of a national examination bank** to assess the knowledge of candidates seeking certification.

The completed National Occupational Analysis will **guide the development of procedures to assess skills** allowing evaluation of performance to the requirements of the National Occupational Analysis.

The completed National Occupational Analysis will **guide the development of performance standards** which will govern the manner in which members of the profession perform their work in the field.

E. Education, Training and Performance Standards

E1. Developing a National Curriculum

Based on the approved National Occupational Analysis, a minimum National Curriculum will be developed. The National Curriculum will represent the road map applied to the development of education and training initiatives for the profession. The National Curriculum will identify what learning points are to be taught, what resource materials will be employed and what evaluation tools will be applied to determine that learning has taken place.

The Alliance could either sub-contract this work out to members of the profession with experience in curriculum design, or to outside educational specialists. It is assumed that the process of developing and approving the National Curriculum would require 1-2 months of time, if placed on a fast track.

It is assumed that the National Curriculum would be divided into specific areas of focus. While some courses or educational programs might be designed to cover all aspects of the National Curriculum, others might be designed to a specific area of knowledge (i.e., electrical systems). The Curriculum should be developed in a manner which isolates the different functions of the profession.

The National Curriculum would be completed, approved by the Board of the Alliance and made available to all organizations involved in the development and delivery of educational programming for the Home Inspection profession.

It is assumed that development of the National Curriculum would be guided by the Education and Training Committee of the National Alliance.

E2. Assessing and Validating Existing Courses and Programs

A host of courses are currently available for Home Inspectors across the country — either as delivered through the post-secondary education system or directly through existing Associations. The courses range from the very specific (electrical) through to longer-term, entry-level Home Inspection certificate programs. To-date, there is no benchmark by which the specific courses can be evaluated to determine whether they provide the knowledge and skills required of the professional Home Inspector. It is assumed that in some instances, the courses provide inadequate coverage of topic areas, while in other instances, the courses cover topics which may not be essential to the Home Inspector.

The development of the National Curriculum (based on the Occupational Analysis) will, for the first time, allow for the implementation of a process whereby existing and new courses can be evaluated. Based on the National Curriculum, all existing courses could be evaluated to determine:

- Which elements/tasks of the National Curriculum/Occupational Analysis they cover;
- The extent of coverage of the specific task/required areas of knowledge;
- Elements which, if added to the course, would enhance coverage of that specific area of the Curriculum;
- Elements of the course which are not deemed essential within the scope of the National Curriculum;
- The currency/accuracy of course materials in relation to the Curriculum.

The process of course validation can occur either at the provincial/regional accrediting agency level, or if courses are available for delivery throughout the country, at the national level.

The onus to validate the course to the National Curriculum would first fall to the applicant, whose application would then be reviewed and approved through a validation process. Formal application procedures will need to be developed by the Education and Training Committee to facilitate the process. The majority of the workload is assumed to fall to the applicant. The validation process would primarily serve as a check and balance to the application process.

The cost of course validation should be borne by the course development and/or delivery agency.

Procedure for Approving Courses for Delivery to Persons Working Toward Certification Status

1. Course developer wishes to have course approved for delivery to persons working toward certification status.
2. Course developer submits course to CSCHI national office or to the provincial/regional accrediting body, with completed application form (fee required?).
 - Description of specific segments of the Certified Home Inspector Occupational Analysis document that the course is designed to satisfy.
 - Description of course delivery requirements
 - Course time required, home study options, etc.
3. CSCHI Board or the provincial/regional accrediting body considers application and, if suitable, grants permission for course to be delivered to persons working toward certification status.
4. Approved course is provided to group or organization with permission to deliver courses.

Responsibilities of Course Developers

1. Develop training courses that provide the student with the opportunity to acquire some or all of the knowledge and/or skills specified in the Occupational Analysis document as adopted by the Alliance.
2. Submit to the Alliance (or provincial/regional accreditation agency) for approval, course guides, outlines, instructional guides and such other information that may reasonably be required to determine the suitability of the course for approval.
3. Specifically identify those segments of the Certified Inspector Occupational Analysis document that the course is designed to satisfy.

Mandatory Courses

The Board of Directors of the Alliance, under the advice of the Education and Training Committee, may decide to make a course or courses mandatory as part of the certification process. This may be the case with Defect Recognition courses or with Report Writing courses. Where deemed mandatory, the Alliance might consider funding the development of one national course, adopting, or building upon existing programs, to provide consistency in delivery in all regions of the country. OAH's Defect Recognition Course, and a variety of Report Writing Courses might be adopted as starting points.

E3. Developing a National Examination Bank

The National Occupational Analysis and resulting National Curriculum would also serve as the tool by which a National Examination Bank is created. The examination Bank will serve as the assessment tool to determine whether an individual candidate has acquired the knowledge required of the certified Home Inspector.

As with the Curriculum, the examination bank will need to be sub-divided to follow the functions and tasks identified in the Occupational Analysis. Each separate function (i.e., marketing, electrical, foundations, etc.) would require a separate set of evaluation questions, allowing the exam to be challenged in course-specific areas or in larger sections.

The examination bank would include a variety of options to 'test' each element of the Curriculum — ensuring that no two examinations are alike. This will prevent any concerns relating to altering course to 'teach to the examination', and will reduce the likelihood of fraud. Specific procedures for ensuring the security of the examination bank will need to be put in place.

Organizations and institutions which are involved in course development and delivery will not have access to the examination bank — once again ensuring that courses are not developed simply to teach to an examination. It is assumed that there are a variety of members of the profession from across the country who have considerable experience in the development of examination. These individuals could be brought together to develop the exam based on the previously developed National Curriculum. The National Alliance should provide funding towards this effort.

E4. Accrediting/Validating Course Delivery Agents

The National Alliance may want to put in place procedures to control the delivery of courses — ensuring that delivery is consistently professional, and that it meets the needs of members of the profession. Some criteria which might be applied to the delivery agents include:

- First-hand knowledge of the profession;
- Experience in performing building/home inspections;
- Experience in delivery of adult education programming;
- Proficiency in the technical subject being delivered;
- Ability to administer evaluation/examination procedures.

Course Delivery Groups and Organizations

Responsibilities

1. Based on the approved National Curriculum, provide a quality learning opportunity for students.
2. As requested by the provincial/regional accrediting organization, conduct examination/assessment procedures of students relating to the curriculum covered by the course.
3. If courses are delivered by distance learning techniques, provide consultation, guidance and assistance to students as required.

Procedure for Granting Permission to Groups/Organizations Wanting to Deliver Approved Education and Training Courses

1. Group or organization wishes to deliver approved education or training course.
2. Group or organization completes application form and submits it to CSCHI national office or to the provincial/regional accrediting body (fee required?).
 - educational credentials of delivery team;
 - delivery experience and capability;
 - references from students of previously taught courses;
 - desired courses for delivery;
 - capacity/ability to conduct examinations/assessments if required by accredited provincial/regional organization;
 - understanding of the issues relating to home and building inspections.
3. CSCHI Board of Directors or the provincial/regional accrediting body, considers application and, if suitable, grants permission to group or organization to deliver all or specific approved courses.
4. Groups or organizations with permission to deliver, offer courses to persons working toward certification status.

E5. Developing a National Standard of Performance

The National Occupational Analysis, and associated task-specific analyses will serve as the guide for the development of a minimum National Standard of Performance for the profession. These Standards would be applied to the performance of the different types of inspections which the profession may offer.

The ISG has discussed the concept of Performance Standards based on insightful input received from members of the profession. The group believes that the development of the Standard should be guided by several key principles:

- The Standard should address what needs to be done — not simply what is currently done;
- The Standard should be more driven by a desire to provide a valuable service to the client — not simply serving as a means of 'protecting the inspector's butt';
- The Standard should be guided by a clarification of House Performance Expectations — allowing the inspector to comment specifically on performance problems with housing.

While the ISG has prepared an approach to the development of Performance Standards (as illustrated in the Appendix), it believes that until the completion of the Occupational Analysis, any further development would be premature.

The ISG would propose that the topic of Performance Standards be raised and addressed by the profession during the focus group sessions proposed in support of development and validation of the Occupational Analysis.

F. Strategic Relationships

The development of strategic relations with national stakeholders can serve to increase the size of the market and the market share available to Certified Home Inspections. The national Alliance will want to formally develop these relationships with key national stakeholders — to the benefit of members of the profession throughout Canada.

At the same point, the National Alliance should provide whatever assistance requested to support the provincial / regional accrediting bodies in the development of strategic relationships in their respective jurisdictions. These relations might include working with allied professionals, educational institutions, provincial real estate regulators and building official associations in their jurisdictions.

The following pages provide examples of the types of relationships which the National Alliance might negotiate with key national stakeholders."

F1. Expanding the Marketplace (Strategic Relations)

Mortgage Insurers

Relationship Expectation:

- (a) Mortgage insurers would require pre-purchase home inspections for all houses which are older than a prescribed age and which will be financed with an insured mortgage.
- (b) Pre-purchase home inspections would be required to be performed/ conducted by a member of the Canadian Society of Certified Home Inspectors.

Rationale:

- (a) Homes with substantial problems increase the risk for mortgage insurers.
- (b) Appraisals often do not reflect the cost of repair for substantial problems.
- (c) Purchasers requiring high-ratio insured mortgages are not as financially capable of handling the costs of substantial problems after taking possession.
- (d) Pre-purchase home inspections will reduce the risk of mortgage defaults by identifying for purchasers any substantial problems prior to closing of the purchase agreement.

Staging Considerations:

- (a) An 'Agreement in Principal' or 'Memorandum of Understanding' should be sought from CMHC and GE Capital Mortgage Insurance ratifying the concept of using only Society registered Certified Inspectors and that purchasers of all houses older than ? years who are financing the sale with insured mortgages must have the house inspected.
- (b) At the point when the first group of inspectors are CSCHI Certified, the administrative procedures should also be established to allow the 'Agreement in Principal' or 'Memorandum of Understanding' to be implemented.

NOTE: Discussions with a senior advisor of CMHC [Mr. D. Dennis] indicated support in principle for a national program and a willingness to present to the Board a proposal for an agreement in principle based on the aforementioned relationship expectations.

Lending Institutions

Relationship Expectation:

- (a) Lenders recommend pre-purchase home inspections to all customers borrowing money for home purchase.
- (b) Lenders offer 'Preferred Supplier' status to members of the Canadian Society of Certified Home Inspectors.
- (c) Lenders include inspection information, based on CSCHI literature, with their promotional materials.

Rationale:

- (a) Homes with substantial problems increase the risk for lenders of non-insured home mortgages.
- (b) Pre-purchase home inspections will reduce the risk of mortgage defaults by identifying for purchasers any substantial problems prior to closing of the purchase agreement.
- (c) Assistance provided by the lender in the home purchase process will result in increased loyalty to the lender.

Staging Considerations:

- (a) An 'Agreement in Principle' should be negotiated with all primary lending institutions providing for lenders to begin recommending pre-purchase home inspections to all home purchasing customers as soon as nationally Certified Home Inspectors are available.
- (b) Initiate process allowing lenders to review the CSCHI certification process. Lenders to be encouraged to confer 'Preferred Supplier' status to members of CSCHI as soon as Certified Home Inspectors are available.

NOTE: Discussions with a senior representative of the Canadian Bankers' Association [Mr. J. Michael Braid] resulted in general agreement with this initiative and support to present and support a proposal based on the aforementioned relationship expectations to the CBA Board.

Real Estate Agents and Brokers

Relationship Expectation:

- (a) Real Estate agents and brokers recommend pre-purchase home inspections to all home-buying prospects.
- (b) Real Estate agents and brokers offer 'Preferred Supplier' status to members of the Canadian Society of Certified Home Inspectors.
- (c) Real Estate agents and brokers include inspection information, based on CSCHI literature, with their information materials.

Rationale:

- (a) Purchasers who discover their home has substantial problems tend to hold the real estate agent morally accountable for this discovery. The relationship between client and agent is stressed.
- (b) Analysis of recent litigation shows that in some cases, realtors can be held legally responsible for problems that should have reasonably been pointed out by the agent prior to the sale and were not.
- (c) Pre-purchase home inspections reduce the potential liability for real estate agents and improve the client/agent relationship.

Staging Considerations:

- (a) An 'Agreement in Principle' should be negotiated with the Canadian Real Estate Association, providing for real estate agents and brokers to begin recommending pre-purchase home inspections to all home purchasers as soon as Certified Home Inspectors are available.
- (b) Initiate process allowing Real Estate Associations/Boards to review the CSCHI certification process. Real Estate Agents and Brokers to be encouraged to confer 'Preferred Supplier' status to members of CSCHI as soon as Certified Home Inspectors become available.

NOTE: Discussions with the executive director of the Canadian Real Estate Association [Mr. Pierre Beauchamp] resulted in support for the establishment of a national program and a willingness to take a proposal based on the aforementioned relationship expectations, to the provincial/territorial Advisory Committee for consideration and support.

Federal Government Departments, Agencies and Crown Corporations

Relationship Expectation:

- (a) The federal government offer 'Preferred Supplier' status to members of the Canadian Society of Certified Home Inspectors.
- (b) The federal government recommend CSCHI members be used whenever housing inspections are required in buildings on crown lands.
- (c) The federal government use certified inspectors/members of the Society, when trained and qualified, as primary delivery agents for national housing assessment programs, such as:
 - The Canadian Home Energy Rating System (CHERS)
 - Residential Rehabilitation Assistance Program (RRAP)
 - Indoor Air Quality Diagnostics (CMHC)
- (d) The National Alliance will provide to federal housing agencies (on a fee for service basis) improved access to housing related data and information required in the development of federal policy.

Rationale:

- (a) It is in the best interests of the crown to have federally owned buildings which require inspections to be inspected by knowledgeable, competent, nationally certified inspectors.
- (b) CSCHI members can be trusted to provide the highest quality of service.

Staging Considerations:

- (a) Initiate process with Departments, Agencies and Crown Corporations of identifying the areas where certified inspectors can be utilized to help provide improved protection for the government and the people that live in government housing.
- (b) An 'Agreement in Principal' should be immediately negotiated with Departments, Agencies and Crown Corporations providing for 'Preferred Supplier' status to members of CSCHI as soon as nationally Certified Inspectors become available.

NOTE: Discussions with the senior development officer of the Canadian Home Energy Rating System, Natural Resources Canada [Mr. T. Hamlin] resulted in support for the establishment of a national program which would be able to integrate the use of the CHERS. There is strong desire to discuss the operational procedures as well as educational criteria and training opportunities.

G. Transition Considerations and Workplan

G1. Building Support

If there is agreement in principle to move forward in the direction proposed, the process of building support within the profession must begin. In the same way in which 5 individuals cannot assume responsibility for transforming a profession, nor can 25 individuals — regardless of their duly elected positions. The membership of CAHI, WAPI, and PACHI, as well as non-aligned members of the profession, need to be informed of the initiative and have the opportunity to understand it and respond. This responsibility will clearly be in the hands of each of these association executives, as represented at the April 1997 meeting.

The ability to take advantage of the strategic relationships forged with the major national stakeholders such as CMHC, GE Capital, Canadian Real Estate Associations, Canadian Bankers' Association and Federal government agencies and departments, will elevate the title of 'Certified Inspector' and increase the business value of the designation many fold.

During the transition period, existing associations and association members will have the opportunity to develop their business plans to allow them to respond to the increase in business and to the new 'competitive' environment among building inspectors in the marketplace.

As the benefits of being a Certified Inspector become more broadly understood and known, the demand for the designation will grow in all areas of Canada providing a highly trained and professional cadre of private sector inspectors.

How the membership requirements of the existing provincial/national/regional associations will dovetail with the national 'Certified Inspector' designation requirements will become clear during the transition period. A fundamental premise of the new organization is that members of existing associations will be recognized for the work/training they have undertaken already.

Experienced inspectors moving toward gaining their 'Certified Inspector' status will find their vast knowledge and experience will serve them well in meeting the criteria. This fact needs to be circulated among all current association members to help reduce the anxiety that naturally occurs when people are being asked to meet a standard by being evaluated.

Critical First Steps — Workplan for the Transition Steering Committee

The Transition Steering Committee will need to put in place at the earliest possible time the following measures. In essence, work will be required on a variety of fronts.

The following pages provide a conceptual Workplan which might guide the initiative. The workplan provides two separate schedules — the first, targeted to granting certification by the fall of 1998, and the second aiming to certify individuals by the end of 1999.

It is clear that in both scenarios, a strong commitment from the profession will be required to ensure that the initiative is successful.

Start-up Workplan

Workplan Item	Key Responsibilities	What's Involved
1 Approval in Principle from Advisory Committee to Proceed with National Initiative	Late April 1997	<ul style="list-style-type: none"> • Second meeting of Advisory Committee • Presentation of ISG Concept Framework report • Integration of Advisory Committee considerations into report • Decision to proceed or scrap the initiative as revised • Clarification of means of negotiating outstanding issues
2 Ratification of Approach by Membership of the Existing Associations in Canada	May/June 1997	<ul style="list-style-type: none"> • Circulation of revised proposal to membership • Circulation of proposed amendments to other stakeholders • Formal approval to proceed with initiative by members and Boards
3 Formulation of Transition Steering Committee	July 15, 1997	<ul style="list-style-type: none"> • Nomination of Transition Steering Committee • Approval of start-up workplan and budget • Develop job description for interim administrative assistant, as required
4 Approval of Revised Concept Framework and Strategy	October 1997	<ul style="list-style-type: none"> • Approval of Concept Framework by key industry stakeholders and potential certifying agencies
5 Secure Commitment of Required Funding for Start-up	October/November	<ul style="list-style-type: none"> • Secure commitment of industry start-up funding • Secure commitment of start-up funding from key stakeholders (lending institutions, CMHC, others) • Secure commitment of funding for National Occupational Analysis from HRDC
6 Hiring of Interim Administration Capacity (as required)	July/November	<ul style="list-style-type: none"> • Short-list applicants • Develop short-term employment/hiring contract • Hire candidate
7 First Meeting of Board of National Alliance	No Later than July 1998	<ul style="list-style-type: none"> • Approval of organizational and administrative structure • Adopt workplans/funding plans developed by start-up committee • Approve committee roles and responsibilities

Start-up Workplan (continued)

Workplan Item	Key Responsibilities	What's Involved
8 Oversee Development of National Occupational Analysis and Provincial/Regional Validation	Complete by December 1997	<ul style="list-style-type: none"> Oversee development of National Occupational Analysis and regional validation procedures Approve completed National Occupational Analysis Delegate responsibilities to committees
9 Accreditation Committee Activities	By February 1998	<ul style="list-style-type: none"> Confirm all criteria governing roles and responsibilities of accrediting agencies Develop administrative procedures to be followed Implement approval procedures
10 Completion of National Course Curriculum	By March 1998	<ul style="list-style-type: none"> Develop National Curriculum based on Occupational Analysis Develop course validation procedures Define course delivery standards
11 Completion of Development of Examination Bank	By April 1998	<ul style="list-style-type: none"> Develop standards for accreditation of certifying agencies Develop standards for accreditation of educational programs On-going control of examination
12 Strategic Liaison Committee Activities	On-going	<ul style="list-style-type: none"> Implement strategies to develop relationships with key stakeholders (lenders, the legal profession, realtors) which provide mutual benefits Monitor relationships to ensure mutually beneficial results
13 Deliver Refresher Course for Existing Experienced Inspectors	Available by Late Spring 1998	<ul style="list-style-type: none"> Develop and make available a one-day update course for experienced members of the profession (highlighting the National Occupational Analysis, updating technical issues, reviewing exam writing skills, etc.) Deliver course through all accrediting agencies
14 Initial Certification of Existing Inspectors	By Summer 1998	<ul style="list-style-type: none"> Allow challenging of exam Implement verification procedures Grant certification Launch program with major promotional campaign

H. Appendices

H1. Approach to the Development of Minimum National Performance Standards for Home Inspectors

The Canadian public has expectations of their housing. Whether new or old, large or small, expensive or inexpensive, in milder or colder climates, Canadians, within reason, expect their housing to be safe, healthy, structurally sound, weather resistant, and habitable.

- **Safe** — houses should be free from electrical, fire and smoke hazards. Houses should allow safe passage in and around the building (egress, guards, handrails, even floors surfaces, adequate headroom, etc.).
- **Healthy** — the house will not make you sick. The air you breathe and water you drink will not cause sickness to non-hypersensitive individuals.
- **Structurally sound** — load bearing components of the house are functioning as required/expected — free from distress, structural defects, rot and insect damage.
- **Weather resistant** — The house will not be affected adversely by rain, wind, snow or extremes in temperature.
- **Habitable** — The house shall be capable of providing acceptable comfort. Services in the home (lighting, water, heating systems) function adequately.

Prospective homeowners seek the advice of the Home Inspection profession to assess their potential purchase in relation to those expectations. Based on the performance expectations of housing, the role of the Home Inspector is to determine whether the house being inspected meets those expectations — within the parameters of a visual, non-invasive inspection. How and what specifically the inspector does is of lesser importance to the client, and is likely to vary from individual to individual — but the inspection must validate how the house performs in relation to stated expectations.

Clients are looking to the Home Inspection profession for answers to several questions, primarily:

- How does the house perform in relation to expectations?
- Are any repairs immediately required prior to occupancy?
- Is it likely that major repairs will be required in the foreseeable future? and
- What is the range of costs which I should be budgeting for having taken possession of the home?

The primary role of the Canadian Home Inspection professional is to provide a report based on their assessment of the property being inspected in relation to performance expectations. The inspector is also assumed to use his experience and professionalism in identifying components of the home which are in need of immediate repair and/or requiring of the owner's attention in the foreseeable future.

The following pages provide examples of one approach to the development of Performance Standards which meet that model.

Component:	Roof
Inspection Objective:	<p>To determine the apparent ability of the roof assembly, presently and for the immediate future, to perform its intended function of:</p> <ul style="list-style-type: none"> • shedding water to prevent water penetration • resisting infestation of rodents, birds and insects • preventing the build-up of moisture in attic spaces • retarding heat loss or gain from/to adjacent living spaces • supporting loads imposed by snow, rain or melt water and/or roof mounted equipment <p>To determine the approximate range of costs, for repair of significant items identified during the inspection.</p>
Inspection Criterion:	<p>To satisfy the inspection objective, the inspector shall investigate, identify and assess the condition of:</p> <ul style="list-style-type: none"> • roofing materials and roof flashing • gutters and downspouts • soffits, fascias and roof vents • attic and/or roof insulation • trusses, rafters, beams, posts and ceiling joists • ceiling finishes
Limitations-general:	<p>The inspector shall not be responsible for compliance with all or any inspection criterion where:</p> <ul style="list-style-type: none"> • access to enclosed spaces is not readily accessible • enclosed spaces are too small to accommodate inspection • the personal safety of the inspector is at risk • materials are covered with ice, snow, or debris that prevents observation
Limitations-specific:	<p>In satisfying the inspection criterion, the inspector is not required to:</p> <ul style="list-style-type: none"> • walk on any roof • open any access panel that is sealed with paint, caulking, etc.
Reporting Obligation:	<p>The inspector shall report on any limitation which prevented any inspection criterion from being satisfied.</p> <p>The inspector shall identify the basis upon which the approximate range of costs were estimated (i.e., who, what, when).</p>

Component:	Electrical
Inspection Objective:	<p>To determine the apparent ability of the electrical system, presently and for the immediate future, to perform its intended function of:</p> <ul style="list-style-type: none"> • providing adequate electricity to light fixtures, appliances and receptacles • protecting occupants from electrical shock • preventing electrical fires <p>To determine the approximate range of costs, for repair of significant items identified during the inspection.</p>
Inspection Criterion:	<p>To satisfy the inspection objective, the inspector shall investigate, identify and assess the condition of:</p> <ul style="list-style-type: none"> • the service entrance (protection) • the main panel and all sub-panels (grounding, protection) • lighting fixtures (operation, clearances) • switches and cover plates (operation, protection) • receptacles (operation, grounding, polarity, protection) • garage door openers (operation, protection) • exhaust fans, circulation fans (operation, protection) • smoke, fire, heat and/or CO detectors (existence, location, operation) • general wiring (type, grounding, junctions, protection)
Limitations-general:	<p>The inspector shall not be responsible for compliance with all or any inspection criterion where:</p> <ul style="list-style-type: none"> • access is restricted or blocked • the personal safety of the inspector is at risk • components of the electrical system in use • circuits are not energized
Limitations-specific:	<p>In satisfying the inspection criterion, the inspector is not required to:</p> <ul style="list-style-type: none"> • insert any tool, probe or testing devise into electrical panels • move any furniture, appliances or personal effects of the occupant • disconnect any electrical devise or control • energize any circuit or electrical device • operate any appliance • inspect ancillary systems that are not part of the primary electrical system (intercoms, security systems, communication cables or wires, low voltage)
Reporting Obligation:	<p>The inspector shall report on any limitation which prevented any inspection criterion from being satisfied.</p> <p>The inspector shall identify the basis upon which the approximate range of costs were estimated (i.e., who, what, when).</p>

Component:	Foundation
Inspection Objective:	<p>To determine the apparent ability of the foundation system, presently and for the immediate future, to perform its intended function of:</p> <ul style="list-style-type: none"> • supporting loads imposed by the superstructure • resisting horizontal loads imposed by the ground • retarding heat loss from adjacent living spaces • preventing the entry of water • draining seepage water that collects under/around the foundation • preventing the build-up of moisture in basement spaces • resisting infestation by rodents and insects <p>To determine the approximate range of costs for repair of significant items identified during the inspection.</p>
Inspection Criterion:	<p>To satisfy the inspection objective, the inspector shall investigate, identify and assess the condition of:</p> <ul style="list-style-type: none"> • foundation walls • grade beams • columns and beams • piers • chimney foundations • entrance ways • sumps and drainage systems • wall insulation • site grading
Limitations-general:	<p>The inspector shall not be responsible for compliance with all or any inspection criterion where:</p> <ul style="list-style-type: none"> • access is restricted or blocked • the personal safety of the inspector is at risk • crawlspaces or enclosed spaces are too small to accommodate inspection • foundation elements are enclosed
Limitations-specific:	<p>In satisfying the inspection criterion, the inspector is not required to:</p> <ul style="list-style-type: none"> • perform a termite inspection
Reporting Obligation:	<p>The inspector shall report on any limitation which prevented any inspection criterion from being satisfied.</p> <p>The inspector shall identify the basis upon which the approximate range of costs were estimated (i.e., who, what, when).</p>

H2. An Overview of a Task Analysis

The following is intended to provide an improved understanding of the development of an Occupational Analysis. The Analysis would include several different tasks as identified by the profession. These might include:

- **Business Management Functions**
(financial, marketing, staffing, operations, legal, etc.)
- **Pre-Purchase Inspections**
(concept example included below)
- **Pre-Delivery Inspections**
(review contract and specifications, identify deficiencies, provide report)
- **Pre-Renovation Consulting**
(house inspection, assessment of homeowner goals and budgets, assessment of alternatives, prioritization of measures, advice re: contracting, etc.)

The following pages offer, in concept form, an explanation of how Task Analyses are structured and what they might look like — as relating to the Pre-Purchase inspection. The presentation is conceptual in nature. As developed, for each sub-task, the Analysis would identify what knowledge and skills are required to be able to competently perform the task.

Task Analysis of the Pre-Purchase Home Inspection

STRUCTURE OF ANALYSIS

Divisions of the Analysis

To facilitate the understanding of the nature of the profession, the work performed is divided into the following constituent parts or divisions.

A. BLOCK – is the largest division within the analysis and reflects a distinct FUNCTION relevant to the profession.

i.e. **BLOCK A:** *Contracting*
BLOCK B: *Client Relations*
BLOCK C: *Performing the Inspection*
BLOCK D: *Report Writing and Communication*

B. SUB-BLOCK – is the division of the FUNCTION into specific areas of management.

i.e. **BLOCK C** — **SUB-BLOCK A:**
Perform Effective Inspection of the Building Exterior

C. TASK – is the distinct activity, that combined with others, makes up the logical and necessary steps the professional is required to perform to complete a specific assignment within a BLOCK or SUB-BLOCK.

i.e. **BLOCK C** — **SUB-BLOCK A** — **TASK 3:**
Determine effectiveness of resistance to water penetration.

D. SUB-TASK – is the smallest division into which it is practical to sub-divide any work activity and, combined with others, fully describe all duties constituting a "TASK".

i.e. **BLOCK C** — **SUB-BLOCK A** — **TASK 3:** — **SUB-TASK 1**
Assess flashings over, and caulking around, windows.

First Cut — For Demonstration Purposes Solely

Block A: CONTRACTING PROCEDURES

- Review contract with client and obtain signature;
- Clarify billing and payment procedures;
- Communicate how you will deal with/identify problems which require engineering professional or trade expertise.

Block B: EFFECTIVE CLIENT RELATIONS

SUB-BLOCK A

Statement of Professionalism

- State your professional/industry qualifications;
- Communicate the benefits of a professional home inspection.

SUB-BLOCK B

Manage Expectations

- Manage expectations — communicating the limitations of a visual, non-intrusive inspection procedure;
- Clarify your reporting format with the client;
- Communicate how you will provide advice relating to projected costs for repairs, and limitations of the information.

SUB-BLOCK C

Educate your Client

- Provide education materials for your client.

The Home Inspector shall not:

- Comment on the practices or work performed by other members of the professions.
- Place himself in a position of conflict of interest through recommending or referring clients to the services of other parties.

BLOCK C: PERFORM EFFECTIVE INSPECTIONS

SUB-BLOCK A

Perform Effective Inspection of the Building Exterior

- Clearly identify the existing condition of the various components;
- Identify any defects which will negatively effect performance expectations of the home in relation to:
 - health
 - safety
 - structural integrity
 - weather resistance, and
 - habitability
- Identify any defects/concerns which require immediate repair;
- Identify any defects/concerns which have a high probability of requiring repair/maintenance by the client in the short-term future;
- Identify the probability of major repair expenses within a *three-year period*;
- Record all information in an inspection report.

Limitations of the Exterior Inspection

- The Home Inspector will report on all elements of the exterior which can be seen at the time of the inspection. The inspector shall identify in the report those components that, due to build-up of snow and/or ice were not visible during the inspection.
- The Home Inspector will not walk on roofing where, in the judgment of the inspector, it might cause damage to the roof surface, or where the inspector believes it might create a safety hazard.
- The Home Inspector will not pass judgment on accessories which do not compose part of the exterior cladding such as antennae, lightning arresting systems, or solar heating or electrical equipment.

SUB-BLOCK B

Perform Effective Inspection of the Building Interior

- Clearly identify the existing condition of the various components;
- Identify any defects which will negatively effect performance expectations of the home in relation to:
 - health
 - safety
 - structural integrity
 - weather resistance, and
 - habitability
- Identify any defects/concerns which require immediate repair;
- Identify any defects/concerns which have a high probability of requiring repair/maintenance by the client in the short-term future;
- Identify probability of major repair expenses within a *three-year period*;
- Record all information in an inspection report.

Limitations of the Interior Inspection

- The Home Inspector will report on all elements of the interior which can be seen at the time of the inspection. The inspector shall identify in the report those components that, due to finished spaces, do not permit visual identification.
- The Home Inspector will not enter into attics where, in his judgment, accessibility is limited or where entry into the space might result in damage and/or a safety hazard.

SUB-BLOCK C

Perform Effective Inspection of the Foundation/Basement

- Clearly identify the existing condition of the various components of the foundation/basement spaces;
- Identify any defects which will negatively effect performance expectations of the home in relation to:
 - health
 - safety
 - structural integrity
 - weather resistance, and
 - habitability
- Identify any defects/concerns which require immediate repair;
- Identify and defects/concerns which have a high probability of requiring repair/maintenance by the client in the short-term future;
- Identify probability of major repair expenses within a *three-year period*;
- Record all information in an inspection report.

Limitations of the Foundation Inspection

- The Home Inspector will report on all elements of the space which can be seen at the time of the inspection. The inspector shall identify in the report those components that, due to finished spaces, do not permit visual identification.
- The Home Inspector will not enter into crawlspaces where, in his judgment, accessibility is limited or where entry into the space might result in damage and/or a safety hazard.

SUB-BLOCK D

Perform Effective Inspection of the Home Mechanical Services

- Clearly identify the existing condition of the various components of the home mechanical services, including:
 - smoke detection and fire alarm systems
 - heating and cooling equipment and distribution systems
 - ventilation equipment and systems
 - DHW
 - plumbing systems
 - electrical systems
- Identify any defects which will negatively effect performance expectations of the home in relation to:
 - health
 - safety
 - structural integrity
 - weather resistance, and
 - habitability
- Identify any defects/concerns which require immediate repair;
- Identify and defects/concerns which have a high probability of requiring repair/maintenance by the client in the short-term future;
- Identify the probability of major repair expenses within a *three-year period*;
- Record all information in an inspection report.

Limitations of the Mechanical Service Inspection

- The Home Inspector will report on all elements of the mechanical services which can be seen at the time of the inspection. The inspector shall identify in the report those components that, due to finished spaces, do not permit visual identification.
- The Home Inspector will not perform functions where, in his judgment, a health or safety hazard exists.

BLOCK D: REPORT WRITING AND COMMUNICATIONS

SUB-BLOCK A

Prepare a Professional Report

- Clearly identifying the existing condition of the various components of the home;
- Clearly identifying any defects which will negatively effect performance expectations of the home in relation to:
 - health
 - safety
 - structural integrity
 - weather resistance, and
 - habitability
- Clearly identifying any defects/concerns which require immediate repair;
- Clearly identifying any defects/concerns which have a high probability of requiring repair/maintenance by the client in the short-term future;
- Clearly identifying the probability of major repair expenses within a *three-year period*.

SUB-BLOCK B

Verbally Communicate the Key Findings of the Report