

Notice of December 7-8, 2016 meeting of the Board of Architectural and Engineering Examiners.
Posted to the Board of Architectural & Engineering Examiners' web site on November 28, 2016.



**STATE OF TENNESSEE
DEPARTMENT OF COMMERCE AND INSURANCE
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS**

500 JAMES ROBERTSON PARKWAY
DAVY CROCKETT TOWER
NASHVILLE, TENNESSEE 37243

Telephone: 615-741-3221 Fax: 615-532-9410

Program Website: <http://www.tn.gov/commerce/section/architects-engineers>

AGENDA

**BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
NOTICE OF BOARD MEETING**

Davy Crockett Tower, Conference Room 1-B
500 James Robertson Parkway
Nashville, Tennessee 37243

Wednesday, December 7, 2016

1:00 P.M. ENGINEER COMMITTEE MEETING

CALL TO ORDER – Laura Reinbold, Chair

NEW BUSINESS

- Applications and Audits for Review, Discussion and Signature

UNFINISHED BUSINESS

- Attendance at 2017 NCEES Southern Zone Meeting
- Fundamentals of Engineering (FE) Exam Waiver
- Licensing Agreement with Japan PE/FE Examiners Council
- Energy Service Companies and Engineering Registration Laws

ADJOURN

The listed order of items and times on the agenda are subject to change, as the Board reserves the right to move to the next agenda items due to cancellations or deferrals.

Board meetings will be conducted by permitting participation of the Board members by electronic or other means of communication if necessary. Any member participation by electronic means shall be audible to the public at the location specified above. The Department of Commerce and Insurance is committed to principles of equal access. If you need assistance with attending this meeting due to a disability please contact the Department's ADA Coordinator at (615) 741-0481.

4:00 P.M. GRANTS COMMITTEE MEETING

CALL TO ORDER – Susan Ballard, Chair

NEW BUSINESS

- Review of Grant Applications

UNFINISHED BUSINESS

- Proposal to Increase Grants Appropriation

ADJOURNMENT

Davy Crockett Tower, Conference Room 1-A
500 James Robertson Parkway
Nashville, Tennessee 37243

Thursday, December 8, 2016

8:30 A.M. ARCHITECT COMMITTEE MEETING

CALL TO ORDER – Rick Thompson, Chair

NEW BUSINESS

- Applications and Audits for Review, Discussion and Signature
- Report on NCARB Member Board Chairs/Member Board Executives Summit

ADJOURNMENT

9:00 A.M. BOARD MEETING

CALL TO ORDER – Susan Ballard, Chair

- Roll Call
- Acknowledge Guests
- Announcements
- Review Agenda for Changes and/or Additions

PRESENTATION OF EMERITUS CERTIFICATES TO HAL BALTHROP,
JEROME HEADLEY, AND BILL LOCKWOOD

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CONSENT AGENDA – John Cothron, Executive Director

- Minutes from October 2016 Board Meeting
- Staff Complaint Report

PUBLIC COMMENT

PROFESSIONAL SOCIETY REPORTS

LEGAL CASE REPORT

DIRECTOR'S REPORT – John Cothron

- Financial Data
- Complaint Data
- Licensing Data

ENGINEER COMMITTEE REPORT – Laura Reinbold

GRANTS COMMITTEE REPORT – Susan Ballard

ARCHITECT COMMITTEE REPORT – Rick Thompson

UNFINISHED BUSINESS

- Action Items – John Cothron

NEW BUSINESS

- Potential Rule Changes – Benjamin Glover
- Authorization of Travel and Speakers – John Cothron
- Report on CIDQ Annual Meeting – Susan Ballard
- October 2017 Board Meeting – John Cothron

ADJOURNMENT

The listed order of items and times on the agenda are subject to change, as the Board reserves the right to move to the next agenda items due to cancelations or deferrals.

Board meetings will be conducted by permitting participation of the Board members by electronic or other means of communication if necessary. Any member participation by electronic means shall be audible to the public at the location specified above. The Department of Commerce and Insurance is committed to principles of equal access. If you need assistance with attending this meeting due to a disability please contact the Department's ADA Coordinator at (615) 741-0481.

THE JAPAN PE/FE EXAMINERS COUNCIL

TENNESSEE STATE BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS

THIS MEMORANDUM OF UNDERSTANDING (the "AGREEMENT") is made and entered into this 19th day November of 2016 by and between The Japan PE/FE Examiners Council (hereinafter referred to as "JPEC"), with a mailing address of 2-10-17-2F, Akasaka, Minato-ku Tokyo, Japan 107-0052 and the Tennessee State Board of Architectural and Engineering Examiners (hereinafter referred to as the "Board"), with a mailing address of 500 James Robertson Pkwy., 5th Floor, Nashville, TN 37243, USA.

The Professional Engineer (PE) license is regarded as the global standard for engineering and is a recognized criterion of an individual's engineering competency;

The Fundamentals of Engineering (FE) and the Principles and Practice of Engineering (PPE) exams are administered in Japan by the National Council of Examiners for Engineering and Surveying (NCEES) and JPEC;

JPEC candidates who have successfully completed the FE and PPE exams cannot become or refer to themselves as a PE until they are licensed in a United States jurisdiction;

JPEC candidates want to apply for PE licensure in Tennessee; and

THEREFORE, in consideration of the mutual covenants and conditions contained herein, JPEC and the Board hereby AGREE as follows:

1. PURPOSE

- 1.1 The purpose of this Agreement is to facilitate the licensure of JPEC candidates as Professional Engineers (PE) in the State of Tennessee.

2. BOARD REQUIREMENTS

- 2.1 The Board will accept candidates for PE licensure who have successfully completed the FE and PPE exams administered by NCEES/JPEC in Japan.
- 2.2 Candidates must meet the Board's requirements for PE licensure contained in Tennessee Code Annotated Title 62, Chapter 2 including:
- a. Education – an engineering degree (4-year minimum) accredited by the Engineering Accreditation Commission (EAC) of the Accreditation Board for Engineering and Technology (ABET) or acceptable evaluation from NCEES Credentials Evaluation Services.
 - b. Exams – Passed both the FE and PPE exams. The FE exam may be waived for applicants with twelve (12) years or more of progressive engineering experience.
 - c. Experience – Four (4) years of progressive engineering experience obtained after graduation with the qualifying degree, with at least (1) year of this experience completed in the United States.
 - a. The Board may grant toward experience requirements for registration as an engineer one (1) year of credit for graduation with a Master's Degree (or higher) in engineering from an approved curriculum or up to one (1) year of qualified experience obtained in

an established cooperative education program, which is carried out within the framework of an approved engineering curriculum, and which has been approved by the Board.

3. JPEC CANDIDATE REQUIREMENTS

- 3.1** Candidates shall use the application forms prescribed by the Board.
- 3.2** The application fee must accompany the application and is the same for U.S. applicants.
- 3.3** Candidates shall obtain an evaluation of their education by NCEES Credentials Evaluation Services unless they have an EAC ABET accredited engineering degree. If they have an EAC ABET accredited engineering degree, candidates must request an official transcript be sent from the school to the Board.
- 3.4** Candidates shall submit five (5) references from individuals familiar with the applicant's work and/or character, three of whom must be licensed engineers. References are not required to be licensed in the United States, but can hold a license from another country such as Japan.
- 3.5** Candidates agree to use their email addresses as their official means of contact with the Board for all purposes.
- 3.6** JPEC will work with the Board to develop appropriate procedures for the exchange of work experience information which will assist the Board in evaluating the engineering experience of the candidates.

4. TERM

The initial term of this AGREEMENT shall be from the effective date through December 31, 2017. Unless terminated by one of the parties, this AGREEMENT shall be automatically extended for additional one-year periods.



IN WITNESS WHEREOF, the parties have executed this AGREEMENT as of the date above.

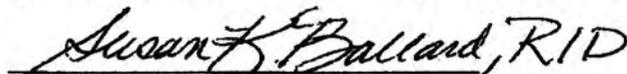
AGREED TO BY:

The Japan PE/FE Examiners Council


Shinichi Yamauchi, P.E., President

November 19, 2016
Date

Tennessee State Board of Architectural and Engineering Examiners


Susan K. Ballard, RID, Chair

10-7-16
Date

Allocation of Grant Funds FY 2016-2017

7/1/2016

<i>Profession</i>	<i>Active Registrants</i>	<i>Inactive Registrants</i>	<i>Total Registrants</i>	<i>% of Overall Registrants</i>
Architects	3,166	412	3,578	19.3%
Engineers	12,007	2,190	14,197	76.6%
Landscape Arch.	330	37	367	2.0%
Interior Designers	345	45	390	2.1%
Total	15,848	2,684	18,532	100.0%

\$ 300,000	Architects	19.3%	\$ 57,900
(Active & Inactive)	Landscape Architects	2.0%	\$ 6,000
	Interior Designers	2.1%	\$ 6,300
	Engineers	76.6%	\$ 229,800
		100.0%	\$ 300,000

Previous Allocations

<i>FY 2003-2004</i>	<i>FY 2010-2011</i>
Architects \$ 38,308	Architects \$ 40,000
Engineers \$ 130,585	Engineers \$ 150,000
Interior Designers \$ 6,107	Interior Designers \$ 10,000
<u>\$ 175,000</u>	<u>\$ 200,000</u>
<i>FY 2004-2005</i>	<i>FY 2011-2012</i>
Architects \$ 37,455	Architects \$ 49,250
Engineers \$ 127,545	Engineers \$ 189,250
Interior Designers \$ 10,000	Land Architects \$ 4,750
<u>\$ 175,000</u>	Interior Designers \$ 6,750
<i>FY 2005-2006</i>	<u>\$ 250,000</u>
Architects \$ 37,950	<i>FY 2012-2013</i>
Engineers \$ 127,050	Architects \$ 48,250
Interior Designers \$ 10,000	Engineers \$ 190,750
<u>\$ 175,000</u>	Land Architects \$ 5,000
<i>FY 2006-2007</i>	Interior Designers \$ 6,000
Architects \$ 37,950	<u>\$ 250,000</u>
Engineers \$ 127,050	<i>FY 2013-2014</i>
Interior Designers \$ 10,000	Architects \$ 57,300
<u>\$ 175,000</u>	Engineers \$ 229,800
<i>FY 2007-2008</i>	Land Architects \$ 6,000
Architects \$ 42,000	Interior Designers \$ 6,900
Engineers \$ 148,000	<u>\$ 300,000</u>
Interior Designers \$ 10,000	<i>FY 2014-2015</i>
<u>\$ 200,000</u>	Architects \$ 57,600
<i>FY 2008-2009</i>	Engineers \$ 229,800
Architects \$ 42,000	Land Architects \$ 5,700
Engineers \$ 148,000	Interior Designers \$ 6,900
Interior Designers \$ 10,000	<u>\$ 300,000</u>
<u>\$ 200,000</u>	<i>FY 2015-2016</i>
<i>FY 2009-2010</i>	Architects \$ 57,600
Architects \$ 40,000	Engineers \$ 230,100
Engineers \$ 150,000	Land Architects \$ 6,000
Interior Designers \$ 10,000	Interior Designers \$ 6,300
<u>\$ 200,000</u>	<u>\$ 300,000</u>



MINUTES OF A MEETING OF THE
TENNESSEE BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
Paris Landing State Park,
Buchanan, Tennessee
Thursday, October 6, 2016

CALL TO ORDER

Susan Ballard, Chair, called the regular meeting of the Tennessee Board of Architectural and Engineering Examiners to order at 8:09 a.m. on October 6, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee. A quorum was declared present.

The following **Board members** were present:

Susan Ballard	Registered Interior Designer
Robert Campbell, Jr.	Professional Engineer
Philip Lim	Professional Engineer
Blair Parker	Registered Landscape Architect
Rick Thompson	Registered Architect
Frank Wagster	Registered Architect
Kathryn Ware	Professional Engineer

The following **Associate Engineer members** were present:

Stephen King	Professional Engineer
Laura Reinbold	Professional Engineer
Ricky Bursi	Professional Engineer

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

The following architectural, engineering, landscape architectural, and interior design **educators** were present for part or all of the meeting:

- Neslihan Alp, The University of Tennessee at Chattanooga, College of Engineering
- Rebecca Andrews, O'More College of Design, Interior Design Program
- Jessica Etheredge, The University of Tennessee at Chattanooga, Department of Interior Design
- Michael Hagge, The University of Memphis, Department of Architecture
- Richard Helgeson, The University of Tennessee at Martin, College of Engineering and Natural Sciences
- Darrell Hoy, Tennessee Technological University, College of Engineering
- D. Dean Isham, East Tennessee State University, Interior Design Program
- Robert LeMaster, The University of Tennessee at Martin, Department of Engineering
- Vic Liptak, O'More College of Design, Interior Design Program

- Siripong Malasri, Christian Brothers University, School of Engineering
- David Matthews, The University of Tennessee at Knoxville, College of Architecture and Design
- Dana Miller, Middle Tennessee State University, Interior Design Program
- Dana Moody, The University of Tennessee at Chattanooga, Department of Interior Design
- Justin Myrick, Lipscomb University, School of Engineering
- Ahad Nasab, Middle Tennessee State University, Mechatronics Engineering Program
- K. Arthur Overholser, Vanderbilt University, School of Engineering
- Masood Parang, The University of Tennessee at Knoxville, College of Engineering
- Scott Poole, The University of Tennessee at Knoxville, College of Architecture and Design
- Jeannette Russ, Union University, Department of Engineering
- Richard Sweigard, The University of Memphis, College of Engineering

The following **guests** were present for part or all of the meeting:

- Kasey Anderson, Tennessee Society of Professional Engineers/American Council of Engineering Companies of Tennessee (TSPE/ACEC-TN)
- Don Baltimore, Tennessee Interior Design Education and Advocacy (TN IDEA)
- Ashley Cates, American Institute of Architects-Tennessee (AIA-TN)
- Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section
- John Sparks, R.A., ESa

MEETING WITH ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL AND INTERIOR DESIGN EDUCATORS

UPDATE ON BOARD ACTIVITIES

Mr. Cothron provided an update on Board activities since the last meeting with educators in October 2014, including recent law and rule changes.

UPDATE ON PROGRAMS/GRANTS PRESENTATIONS

Each educator in attendance provided an update on their program(s) and how grant funds provided by the Board have been utilized.

GRANTS PROGRAM DISCUSSION

Mr. Cothron provided an overview of the Board's grants program, including a review of the grant guidelines.

BREAKOUT SESSIONS

The following topics were discussed in breakout sessions:

- Architecture/Landscape Architecture/Interior Design
 - Update on NCARB, CLARB and CIDQ Activities
 - Licensure Outreach
- Engineering
 - NCEES Update
 - New Engineer Intern Application Process/Online Applications
 - Licensure Outreach
 - Decoupling of the Experience and Examination Requirements for PE Registration

- Value and Use of the FE Exam

The meeting recessed at 12:00 p.m., and resumed at 4:00 p.m.

Public member Susan Maynor arrived at 4:00 p.m.

PROFESSIONAL SOCIETY REPORT

Ashley Cates reported on the activities of the AIA-TN.

DISCUSSION OF ALTERNATIVE PROCUREMENT/DELIVERY METHODS

John Sparks delivered a presentation on alternative procurement and delivery methods.

DISCUSSION OF QUALIFICATIONS-BASED SELECTION AND ADDITIONAL SERVICES

Mr. Bursi reviewed a draft memo that he prepared regarding qualifications-based selection and additional services, after which Mr. Glover explained the complexity of the issue under discussion. Mr. Glover stated that the complaint process would be the proper avenue for the Board to make a determination on QBS issues. He advised the Board to simply listen to the State Architect's presentation on Friday, and to not offer an opinion on the various procurement methods that he presents. Mr. Glover noted that the Board could make a motion to request a legal opinion on the subject. Board members agreed that they were not ready to make a decision on the issue and will need to gather additional information.

The meeting adjourned at 6:22 p.m.



MINUTES OF A MEETING OF THE
TENNESSEE BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
Paris Landing State Park,
Buchanan, Tennessee
Friday, October 7, 2016

CALL TO ORDER

Susan Ballard, Chair, called the regular meeting of the Tennessee Board of Architectural and Engineering Examiners to order at 8:10 a.m. on October 7, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee. A quorum was declared present.

The following **Board members** were present:

Susan Ballard	Registered Interior Designer
Robert Campbell, Jr.	Professional Engineer
Philip Lim	Professional Engineer
Susan Maynor	Public Member
Blair Parker	Registered Landscape Architect
Rick Thompson	Registered Architect
Frank Wagster	Registered Architect
Kathryn Ware	Professional Engineer

The following **Associate Engineer members** were present:

Stephen King	Professional Engineer
Laura Reinbold	Professional Engineer
Ricky Bursi	Professional Engineer

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

The following **guests** were present for part or all of the meeting:

Kasey Anderson, Tennessee Society of Professional Engineers/American Council of Engineering Companies of Tennessee (TSPE/ACEC-TN)
Don Baltimore, Tennessee Interior Design Education and Advocacy (TN IDEA)
Nathan Ridley, American Society of Landscape Architects TN (ASLA-TN)
Peter L. Heimbach, Jr., State Architect

Mr. Cothron announced that Kathryn Ware and Brian Tibbs have been appointed to serve on the Board, replacing Hal Balthrop and Jerome Headley, respectively. Stephen King has also been reappointed to the Board.

CONSENT AGENDA (attached)

Motion was made by Mr. Wagster and seconded to approve the minutes of the August 2016 meeting. The motion passed unanimously.

Motion was made by Mr. Thompson and seconded to approve the Complaints for Board Decision. The motion carried unanimously.

PROFESSIONAL SOCIETY REPORTS

Kasey Anderson, Don Baltimore, and Nathan Ridley reported on the activities of the TSPE/ACEC-TN, TN IDEA, and ASLA-TN respectively.

LEGAL CASE REPORT (presented by Ben Glover) (attached)

1. *Case No. 20150221771* *Complaint #2015022177*
Motion was made by Mr. Lim and seconded to close the complaint upon the surrender of the Respondent's engineering license and agreement to never seek a Tennessee registration ever again. The motion passed unanimously.

2. *Case No. 2016049131* *Complaint #201604913*
Mr. Campbell recused himself.
Motion was made by Mr. Thompson and seconded to authorize a Consent Order with a one hundred dollar (\$100) civil penalty and a requirement to take and pass the Board's laws and rules exam within ninety (90) days of the execution of the Consent Order. The motion passed unanimously.

3. *Case No. 2016053641* *Complaint #201605364*
Mr. Campbell recused himself.
Motion was made by Ms. Ware and seconded to authorize a Consent Order with a five hundred dollar (\$500) civil penalty and a requirement to take and pass the Board's laws and rules exam within ninety (90) days of the execution of the Consent Order. The motion passed unanimously.

DIRECTOR'S REPORT

Mr. Cothron reported his activities and those of his staff and Board members. Mr. Cothron noted that he received a follow-up communication from Senator Brian Kelsey's office regarding the reintroduction of a bill allowing persons holding a master's degree in engineering to qualify for engineer registration.

Complaint Data was presented for informational purposes only. (attached)

Licensing Data was presented for informational purposes only. (attached)

Financial Data was presented for informational purposes only. (attached)

UNFINISHED BUSINESS

- *Action Items* (attached)
The action items taken from the August meeting were reviewed and the required action had either been taken or is in process.
 - Review of the revised *Reference Manual* continues.
 - Legal counsel advised against the Board signing the "Mutual Recognition Arrangement with Australia and New Zealand Letter of Undertaking."
 - Proposed Rule changes will be drafted and presented at the December meeting.

- *Qualifications-Based Selection (QBS) and Additional Services*
State Architect Peter L. Heimbach, Jr. addressed the Board regarding different procurement models for state projects and how they relate to qualifications-based selection of design professionals.

Motion was made by Mr. Campbell and seconded for legal counsel to review the different procurement models presented by the State Architect as they relate to qualifications-based selection of design professionals and report at the December meeting. The motion passed unanimously.

Break 9:40 – 9:53 a.m.

NEW BUSINESS

- *Committee Assignments*
The Chair updated committee assignments:
 - ✓ Brian Tibbs was appointed to the Architect Committee (replacing Jerome Headley), the Law and Rules/Policies Committee (replacing Jerome Headley) and the Outreach Committee (replacing Rick Thompson).
 - ✓ Kathryn Ware was appointed to the Interior Design Committee (replacing Hal Balthrop), the Nominations Committee (replacing Philip Lim), and the Continuing Education Committee (replacing Hal Balthrop).
 - ✓ In accordance with the Bylaws, Philip Lim was named chair of the Finance Committee, replacing Frank Wagster.
 - ✓ Frank Wagster was appointed to the Interior Design Committee, replacing Jerome Headley.
 - ✓ Laura Reinbold was removed from the Continuing Education Committee.
- *Authorization of Travel and Speakers*
Motion was made by Ms. Ware and seconded to authorize Mr. Lim to observe during an ABET accreditation visit at The University of Tennessee at Martin on October 23-25, 2016, and to authorize Mr. Lim and Mr. Cothron to speak at Lipscomb University on November 10, 2016. The motion passed unanimously.
- *2017 Proposed Travel*
Motion was made by Mr. Parker and seconded to accept the 2017 travel proposal with the exception of the NCEES Regional Meeting slated to be held in St. Thomas, Virgin Islands, which will be discussed by the Engineer Committee in December. The motion passed unanimously.
- *Application/Examination Deadline Dates*
Motion was made by Mr. Campbell and seconded to approve the 2017 application/examination deadlines as proposed. The motion passed unanimously.

COMMITTEE REPORTS

The minutes of each Committee meeting follow these minutes.

- *Interior Design Committee*
Ms. Ballard reported that the Interior Design Committee did not meet due to lack of a quorum.
- *Landscape Architect Committee*
There were no recommendations from this committee.
- *Architect Committee*
The Committee, through Mr. Thompson, moved that the Board sign the Letter of Undertaking with respect to the Mutual Recognition Arrangement with Australia and New Zealand. The motion passed unanimously.
- *Engineer Committee*
The Committee, through Ms. Reinbold, moved that the Board sign the Memorandum of Understanding with the Japan PE/FE Examiners Council (JPEC). The motion passed unanimously.
- *Law and Rules/Policies Committee*
The Committee, through Mr. Thompson, moved the following:
 - Pursue a law change to eliminate the experience duration requirement in the law for architect exam applicants, and to simply require completion of the Intern Development Program (IDP)/Architectural Experience Program (AXP) for these applicants;
 - Direct legal counsel to draft all proposed rule changes with the exceptions of the change to the one-year U.S. experience requirement for engineers and the change relative to graduate degrees earned concurrently with work experience;
 - Table adding the Design Competitions/Requests for Proposals/Requests for Qualifications policy to the rules pending research by Board staff and a legal opinion;
 - Amend Part 6 of the Bylaws to combine the Publications and Licensure Outreach committees into one Outreach Committee.

The motion passed unanimously.

- *Grants to Higher Education Committee*
There were no recommendations from this committee.
- *Publications and Licensure Outreach Committees*
The Committees, through Mr. King, moved to direct Mr. Cothron to invite representatives from NCEES to attend a future Board meeting to discuss licensure outreach and reducing the Fundamentals of Engineering exam cost for students, among other topics. The motion passed unanimously.
- *Continuing Education Committee*
The Committee, through Mr. Wagster, moved that a rule be drafted allowing engineers and landscape architects to report continuing education hours on a calendar year basis. The motion passed unanimously.
- *Finance Committee*
There were no recommendations from this committee.

EMERITUS CERTIFICATES

Motion was made by Mr. Thompson and seconded to issue Emeritus Certificates to Hal Balthrop, Jerome Headley, and Bill Lockwood. The motion passed unanimously.

The meeting adjourned at 10:44 a.m.

ATTACHMENTS



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
LANDSCAPE ARCHITECT COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Wednesday, October 5, 2016

CALL TO ORDER

Blair Parker, Committee Chair, called the Landscape Architect Committee meeting to order at 1:49 p.m. on October 5, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Blair Parker, R.L.A.	Chair
Frank Wagster, R.A.	Architect Member
Robert Campbell, Jr., P.E.	Engineer Member

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitors present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section; Kasey Anderson, Tennessee Society of Professional Engineers/American Council of Engineering Companies of Tennessee (TSPE/ACEC-TN); and Ashley Cates, American Institute of Architects-Tennessee (AIA-TN).

NEW BUSINESS

POTENTIAL LAW, RULE, AND POLICY CHANGES

Committee members discussed the following potential rule changes:

- Amend Rules 0120-01-.04 Applications – General and 0120-04-.03 Applications regarding the application pending status period for engineer intern, registered interior

designer, and comity applications. The committee supported changing the pending status period for these applications to expire one (1) year from the date of application, but requested that the proposed rule include a provision for the Board to extend this period for extenuating circumstances.

- The committee supported amending the rules to allow architect and landscape architect exam candidates to apply directly to the National Council of Architectural Registration Boards (NCARB) and the Council of Landscape Architectural Registration Board (CLARB) to sit for the exams.
- The committee supported adding language to the rules regarding confidentiality of references.
- The committee concluded that further discussion of the policy on design competitions/RFPs/RFOs was needed before adding this policy to the rules.

CLARB ANNUAL MEETING REPORT

Mr. Parker and Mr. Cothron reviewed a written report on the 2016 CLARB Annual Meeting.

Adjourn. The Chair adjourned the meeting at 2:21 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
ARCHITECT COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Wednesday, October 5, 2016

CALL TO ORDER

Rick Thompson, Committee Chair, called the Architect Committee meeting to order at 2:39 p.m. on October 5, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Rick Thompson, R.A., Chair	East TN Architect Member
Frank Wagster, R.A.	West TN Architect Member

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitors present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section; Kasey Anderson, Tennessee Society of Professional Engineers/American Council of Engineering Companies of Tennessee (TSPE/ACEC-TN); and Ashley Cates, American Institute of Architects-Tennessee (AIA-TN).

NEW BUSINESS

MUTUAL RECOGNITION ARRANGEMENT WITH AUSTRALIA AND NEW ZEALAND LETTER OF UNDERTAKING

Committee members reviewed and discussed the Mutual Recognition Arrangement (MRA) with Australia and New Zealand and the associated Letter of Undertaking, as approved at the 2016 NCARB Annual Meeting. The intent of the arrangement is to facilitate licensure mobility between the United States and Australia and New Zealand. At the August Board meeting, the

Board had requested that Legal Counsel research the MRA and report at the October meeting. Mr. Glover stated that the Board has the authority to sign the Letter of Undertaking, but he recommended that the Board not sign the MRA since it would limit the Board's discretion in reviewing comity applications from individuals licensed in Australia and New Zealand.

Motion was made by Mr. Wagster and seconded to recommend that the Board sign the Mutual Recognition Arrangement Letter of Undertaking. The motion passed unanimously.

POTENTIAL LAW, RULE, AND POLICY CHANGES

Committee members discussed the following potential law and rule changes:

- The committee supported eliminating the experience duration requirement in the law for architect exam applicants, and to simply require completion of the Intern Development Program (IDP)/Architectural Experience Program (AXP). This would be submitted as a legislative proposal for 2018.
- Amend Rules 0120-01-.04 Applications – General and 0120-04-.03 Applications regarding the application pending status period for engineer intern, registered interior designer, and comity applications. The committee supported changing the pending status period for these applications to expire one (1) year from the date of application, with the inclusion of a provision for the Board to extend this period for extenuating circumstances.
- The committee supported amending the rules to allow architect and landscape architect exam candidates to apply directly to the National Council of Architectural Registration Boards (NCARB) and the Council of Landscape Architectural Registration Board (CLARB) to sit for the exams.
- The committee supported restoring subparagraph (d) to Rule 0120-01-.11(3), regarding the acceptability of architectural degrees from a program accredited by the Canadian Architectural Certification Board (CACB), or from a program deemed substantially equivalent by the National Architectural Accrediting Board (NAAB).
- The committee supported adding language to the rules regarding confidentiality of references.
- The committee did not support adding the policy on design competitions/RFPs/RFQs to the rules, and suggested repealing the policy. It was noted that many states do not allow unlicensed architects to participate in design competitions or respond to RFPs or

Architect Committee Minutes, October 5, 2016

RFQs. Mr. Glover suggested that if the policy is added to the rules, a time limit would need to be imposed for applicants to complete the application process.

Adjourn. The Chair adjourned the meeting at 3:08 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
ENGINEER COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Wednesday, October 5, 2016

CALL TO ORDER

Laura Reinbold, P.E., Committee Chair, called the Engineer Committee meeting to order at 3:14 p.m. on October 5, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Engineer Board members** were present for part or all of the meeting:

Laura Reinbold, P.E.	Chair, Middle TN Associate Member
Robert Campbell, P.E.	East TN Member
Philip Lim, P.E.	West TN Member
Kathryn Ware, P.E.	Middle TN Member
Ricky Bursi, P.E.	West TN Associate Member
Stephen King, P.E.	East TN Associate Member

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitors present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section; Kasey Anderson, Tennessee Society of Professional Engineers/American Council of Engineering Companies of Tennessee (TSPE/ACEC-TN); and Ashley Cates, American Institute of Architects-Tennessee (AIA-TN).

NEW BUSINESS

POTENTIAL LAW, RULE, AND POLICY CHANGES

Committee members discussed the following potential rule changes:

- Amend Rules 0120-01-.04 Applications – General and 0120-04-.03 Applications regarding the application pending status period for engineer intern, registered interior designer, and comity applications. The committee supported changing the pending status period for these applications to expire one (1) year from the date of application, with the inclusion of a provision for the Board to extend this period for extenuating circumstances.
- The committee supported adding language to the rules regarding confidentiality of references.
- The committee opposed amending Rule 0120-01-.10(2) to state, “At least one (1) year of engineering experience must either be completed in the United States or show a familiarity with U.S. codes and engineering practice.” The committee concluded that there is value in retaining the requirement for one (1) year of experience in the U.S.
- The committee supported amending Rule 0120-01-.10(2) to state that a graduate degree that is used, in part or in whole, to satisfy education requirements cannot be applied for experience credit toward licensure. However, the committee did not support adding language stating that experience credit for a graduate degree cannot be earned concurrently with work experience credit.
- The committee did not support adding the policy on design competitions/RFPs/RFQs to the rules, and requested that staff research the history of the policy and which jurisdictions allow unlicensed design professionals to participate in design competitions or respond to RFPs or RFQs. The committee also requested a legal opinion on the meaning of “offer to practice.”

APPLICATIONS AND AUDITS FOR DISCUSSION

- **Mitchell Glenn LaBiche** (Comity) – Following discussion of the applicant’s felony conviction, committee members agreed to approve the application.

FUNDAMENTALS OF ENGINEERING (FE) EXAM WAIVER

The law currently exempts applicants with twelve (12) years or more of acceptable engineering experience from the requirement to take and pass the FE exam [T.C.A. § 62-2-401(a)(2)]. Mr. Bursi noted that the issue of FE exam waivers was discussed at the NCEES Annual Meeting, and it was suggested that these waivers should be removed to facilitate mobility. The committee requested that staff research how many jurisdictions have a similar exemption, how many applicants apply under this provision, and how this change would impact comity registration.

Mr. Lim arrived at 4:19 p.m.

CONTINUING EDUCATION UNIFORMITY

Following a discussion of the need for greater continuing education uniformity among jurisdictions, the committee concluded that they would like to pursue a rule change allowing engineers to report continuing education hours on a calendar-year basis, similar to the alternative continuing professional development option rule adopted for architects and registered interior designers in 2015. The rule would also include a definition of health, safety, and welfare subjects. Committee members agreed to refer this matter to the Continuing Education Committee.

REPORT ON NCEES ANNUAL MEETING

The committee reviewed a written report on the 2016 NCEES Annual Meeting.

OUTREACH TO EMPLOYERS RE: EXPERIENCE REQUIREMENTS

Mr. Campbell suggested outreach to managers through ACEC-TN as an effective approach to educate employers regarding the experience requirements for PE licensure. Mr. Bursi was asked to write an article on this subject for inclusion in the Board's newsletter, with assistance from Mr. Campbell.

USE OF EXPERIENCE INFORMATION IN NCEES RECORDS

Ms. Phillips explained that many applicants with NCEES records complain about the requirement to list their experience on the state application form when the same information is included in their record. The committee concluded that it would be acceptable for applicants

to refer to their NCEES experience record and not list this information on the state application form. However, applicants will still need to list their references on the application.

UNFINISHED BUSINESS

LICENSING AGREEMENT WITH JAPAN PE/FE EXAMINERS COUNCIL (JPEC)

Motion was made by Ms. Ware and seconded to recommend that the Board sign the Memorandum of Understanding with JPEC as drafted, retaining the requirement that at least one (1) year of experience be completed in the United States. The motion passed unanimously.

ENERGY SERVICE COMPANIES AND ENGINEERING REGISTRATION LAWS

Mr. Cothron reported that he will follow up with the Association of Energy Engineers (AEE) regarding the committee's request that an AEE representative attend a future committee meeting to discuss the certifications they offer.

Adjourn. Ms. Reinbold adjourned the meeting at 5:17 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
LAW AND RULES/POLICIES COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Thursday, October 6, 2016

CALL TO ORDER

Rick Thompson, R.A., Committee Chair, called the Law and Rules/Policies Committee meeting to order at 1:00 p.m. on October 6, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Rick Thompson, R.A., Chair
Susan Ballard, R.I.D.
Robert Campbell, Jr., P.E.
Blair Parker, R.L.A.
Laura Reinbold, P.E., Associate Member

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitors present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section; Ashley Cates, American Institute of Architects-Tennessee (AIA-TN); and Don Baltimore, Tennessee Interior Design Education and Advocacy (Tennessee IDEA).

NEW BUSINESS

POTENTIAL LAW, RULE, AND POLICY CHANGES

Committee members discussed the following potential law and rule changes:

- Motion was made by Mr. Campbell and seconded to recommend that the Board pursue a law change to eliminate the experience duration requirement in the law for architect exam applicants, and to simply require completion of the Intern Development Program (IDP)/Architectural Experience Program (AXP). The motion passed unanimously.
- Amend Rules 0120-01-.04 Applications – General and 0120-04-.03 Applications regarding the application pending status period for engineer intern, registered interior designer, and comity applications. The committee supported changing the pending status period for these applications to expire one (1) year from the date of application, with the inclusion of a provision for the Board to extend this period for extenuating circumstances.
- The committee supported amending the rules to allow architect and landscape architect exam candidates to apply directly to the National Council of Architectural Registration Boards (NCARB) and the Council of Landscape Architectural Registration Board (CLARB) to sit for the exams.
- The committee supported restoring subparagraph (d) to Rule 0120-01-.11(3), regarding the acceptability of architectural degrees from a program accredited by the Canadian Architectural Certification Board (CACB), or from a program deemed substantially equivalent by the National Architectural Accrediting Board (NAAB).
- The committee supported adding language to the rules regarding confidentiality of references.
- The committee opposed amending Rule 0120-01-.10(2) to state, “At least one (1) year of engineering experience must either be completed in the United States or show a familiarity with U.S. codes and engineering practice.”
- The committee supported amending Rule 0120-01-.10(2) to state that a graduate degree that is used, in part or in whole, to satisfy education requirements cannot be applied for experience credit toward licensure. However, the committee did not support adding language stating that experience credit for a graduate degree cannot be earned concurrently with work experience credit.

Motion was made by Mr. Campbell and seconded to recommend to the Board that legal counsel be directed to draft all proposed rule changes with the exceptions of the change to the one-year U.S. experience requirement for engineers and the change relative to graduate degrees earned concurrently with work experience. The motion passed unanimously.

- Motion was made by Mr. Parker and seconded to recommend that the Board table adding the Board policy on design competitions/RFPs/RFQs to the rules pending research by Board staff and a legal opinion. The motion passed unanimously.

PROPOSED BYLAWS CHANGE

Motion was made by Mr. Campbell and seconded to recommend that the Board amend Part 6 of the Bylaws to combine the Publications and Licensure Outreach committees into one Outreach Committee. The motion passed unanimously.

Adjourn. Mr. Thompson adjourned the meeting at 1:31 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
GRANTS TO HIGHER EDUCATION COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Thursday, October 6, 2016

CALL TO ORDER

Susan Ballard, Committee Chair, called the Grants to Higher Education Committee meeting to order at 2:02 p.m. on October 6, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Susan Ballard, R.I.D.
Philip Lim, P.E.
Blair Parker, R.L.A.
Frank Wagster, R.A.

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitors present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section; Ashley Cates, American Institute of Architects-Tennessee (AIA-TN); and Don Baltimore, Tennessee Interior Design Education and Advocacy (Tennessee IDEA).

NEW BUSINESS

PROPOSAL TO INCREASE GRANTS APPROPRIATION

Mr. Cothron reported on the status of the Board's request to increase the grants appropriation to \$500,000. Brian T. McCormack, the Assistant Commissioner of Regulatory Boards, will present alternative proposals for the Board's consideration.

REVIEW OF GRANT GUIDELINES

The committee reviewed the current grant guidelines, and no changes were suggested.

UPDATE ON PROPOSAL SUBMISSIONS

Mr. Cothron reported on the status of grant proposal submissions, which are due by October 28, 2016.

Adjourn. The Chair adjourned the meeting at 2:19 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
CONTINUING EDUCATION COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Thursday, October 6, 2016

CALL TO ORDER

Frank Wagster, Committee Chair, called the Continuing Education Committee meeting to order at 2:30 p.m. on October 6, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Frank Wagster, R.A.
Ricky Bursi, P.E., Associate Member
Blair Parker, R.L.A.
Laura Reinbold, P.E., Associate Member

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitors present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section; Ashley Cates, American Institute of Architects-Tennessee (AIA-TN); and Don Baltimore, Tennessee Interior Design Education and Advocacy (Tennessee IDEA).

NEW BUSINESS

POTENTIAL RULE AND POLICY CHANGES

Mr. Bursi and Mr. Parker expressed an interest in expanding the alternative continuing professional development option in Rule 0120-05-.14, which allows registrants to report continuing education hours on a calendar year basis, to include engineers and landscape architects.

Mr. Wagster suggested that at some point the continuing education rules should be amended to require calendar year reporting for all registrants and to “sunset” the original requirement to report hours earned during the two years immediately preceding the application for renewal.

Motion was made by Mr. Bursi and seconded to recommend to the Board that legal counsel be directed to draft a rule change allowing engineers and landscape architects to report continuing education hours on a calendar year basis (with no changes to the current health, safety and welfare and carryover hour provisions for those professions). The motion passed unanimously.

Committee members suggested that the elimination of carryover hours and a proposal to require all continuing education hours to address health, safety and welfare issues continue to be discussed.

Adjourn. The Chair adjourned the meeting at 2:57 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
JOINT PUBLICATIONS/LICENSURE OUTREACH COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Thursday, October 6, 2016

CALL TO ORDER

Stephen King, Committee Chair, called the joint Publications/Licensure Outreach Committee meeting to order at 3:00 p.m. on October 6, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Ricky Bursi, P.E., Associate Member
Stephen King, P.E., Associate Member
Blair Parker, R.L.A.
Rick Thompson, R.A.

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitor present: Chris Gwaltney, P.E., representing the American Society of Civil Engineers (ASCE), Tennessee Section.

NEW BUSINESS

PUBLICATIONS REVISIONS

Mr. Cothron reported on the status of the *Reference Manual for Building Officials and Design Professionals*, which was revised in December 2015. The revised *Reference Manual* is currently being reviewed by the Fire Prevention Division and legal staff.

NEWSLETTER ARTICLES

Mr. Bursi, with assistance from Mr. Campbell, will write an article on the experience requirements for engineer registration for inclusion in the Board's newsletter.

LICENSURE PROMOTION ON CAMPUSES

Mr. Cothron reported on outreach efforts, and Board members were encouraged to participate in these efforts.

MEETINGS WITH DEANS/PROGRAM DIRECTORS

Mr. Cothron noted that 20 educators attended this year's meeting with deans and program directors, and feedback from the meeting was positive. Another meeting with educators will be scheduled in October 2018.

Motion was made by Mr. Bursi and seconded to recommend that the Board extend an invitation for a NCEES representative(s) to attend a future Board meeting to discuss licensure outreach and reducing the Fundamentals of Engineering exam cost for students, among other topics. The motion passed unanimously.

Adjourn. The Chair adjourned the meeting at 3:22 p.m.



MINUTES
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS
FINANCE COMMITTEE MEETING
Paris Landing State Park Inn and Conference Center
Buchanan, Tennessee
Thursday, October 6, 2016

CALL TO ORDER

Philip Lim, Committee Chair, called the Finance Committee meeting to order at 3:31 p.m. on October 6, 2016, at the Paris Landing State Park Inn and Conference Center, in Buchanan, Tennessee.

The following **Board members** were present:

Philip Lim, P.E.
Susan Ballard, R.I.D.
Robert Campbell, Jr., P.E.
Rick Thompson, R.A.

A quorum was present.

The following **Board staff** was present:

John Cothron	Executive Director
Benjamin Glover	Legal Counsel
Zack Nitzschke	Paralegal
Wanda Garner	Administrative Assistant
Wanda Phillips	Administrative Manager

Visitor present: Ashley Cates, American Institute of Architects-Tennessee (AIA-TN).

NEW BUSINESS

REVIEW OF FINANCIAL DATA

Committee members reviewed the financial reports prepared by Board staff.

PROPOSAL TO INCREASE GRANTS APPROPRIATION

Mr. Cothron reported on the status of the Board's request to increase the grants appropriation to \$500,000. Brian T. McCormack, the Assistant Commissioner of Regulatory Boards, will present alternative proposals for the Board's consideration.

Adjourn. The Chair adjourned the meeting at 3:53 p.m.

REGULATORY BOARDS
EXPENDITURES
For Fiscal Years 2013 - 2016

	FY12-13	FY13-14	FY14-15	FY15-16
EXPENDITURES BY OBJECT	A&E	A&E	A&E	A&E
Regular Salaries and Wages (70100)	\$ 243,149	\$ 262,959	\$ 252,969	\$ 241,180
Longevity (70102)	12,100	12,600	13,400	11,700
Overtime (70104)	-	-	-	-
Employee Benefits (702)	109,763	116,098	112,988	100,000
Payroll Expenditures	365,012	391,657	379,357	352,880
Travel (703)	44,106	41,367	39,899	44,105
Printing, Duplicating & Film Proc. (704)	1,958	375	66	-
Utilities and Fuel (705)	-	-	-	-
Communications & Shipping (706)	18,170	21,467	23,087	16,305
Maint., Repairs and Svcs by Others (707)	-	230	17	140
Third Party Prof. & Admin. Svcs (708)	286,476	184,011	59,164	61,058
Supplies and Office Furniture (709)	1,102	2,540	796	1,240
Rentals and Insurance (710)	2,149	1,851	1,358	3,402
Motor Vehicle Operation (711)	-	-	-	-
Awards and Indemnities (712)	3,000	-	-	-
Grants and Subsidies (713)	250,000	300,000	300,000	290,851
Unclassified Expenses (714)	-	-	-	-
Training of State Employees (721)	7,780	5,680	4,970	8,130
Computer Related Items (722)	611	2,222	609	1,536
State Prof. Svcs. (725)	75,330	49,890	47,192	43,165
Total Other Expenditures	690,682	609,633	477,157	469,932
GRAND TOTAL	1,055,694	1,001,290	856,514	822,812
Cost Backs:				
Administration	215,746	208,238	278,665	157,271
Investigation	-	3,297	7,845	-
Legal	20,252	45,605	-	73,469
Field Enforcement	-	-	-	-
Customer Service Center	-	-	-	9,751
Total Cost Backs	235,998	257,140	286,510	240,491
TOTAL EXPENDITURES	1,291,691	1,258,430	1,143,023	1,063,303
Licensing Revenue	1,560,771	1,446,659	1,542,125	1,287,083
Case and Complaint Revenue	15,400	15,450	2,150	5,700
Less: State Regulatory Fee	101,500	93,300	100,690	91,340
NET REVENUE	1,474,671	1,368,809	1,443,585	1,201,443
FISCAL YEAR BALANCE	182,979	110,379	300,561	138,140
PRIOR FISCAL YEAR RESERVE	1,008,596	1,191,575	1,213,000	1,513,561
RESERVE BALANCE	1,191,575	1,301,954	1,513,561	1,651,701
CORE Expense	-	88,954	-	-
RESERVE BALANCE AFTER CORE EXPENSE	1,191,575	1,213,000	1,513,561	1,651,701

FIRST QUARTER FISCAL YEAR 2017 FINANCIAL REPORT

Revenue:

- Licensing revenue for the first quarter of fiscal year 2017 increased \$77,546 from the first quarter of fiscal year 2016, due largely to the normalization of revenue following the issuance of early renewal notices last year prior to the implementation of our new licensing system.

Expenses:

- Personal services expenditures (staff salaries, per diems, employee benefits) remained consistent with the first quarter of fiscal year 2016.
- In-state travel expenses decreased \$817.
- Out-of-state travel expenses decreased \$2,210.
- Communication costs increased \$714.
- Third Party Professional Services increased \$1,498.
- Supplies and Office Furniture increased \$433.
- Training of State Employees, which includes registration fees for national council meetings, decreased \$2,625.
- State Professional Services expenses decreased \$2,309.
- Overall, direct expenditures decreased \$556.
- The year-to-date reserve balance is \$210,045. The accumulated reserve at the end of FY 2016 was \$1,651,701.

**FY 2016-2017 PRELIMINARY FINANCIAL REPORT
BOARD OF ARCHITECTURAL AND ENGINEERING EXAMINERS**

	1ST QUARTER JULY-SEPT 2016	1ST QUARTER JULY-SEPT 2015	2ND QUARTER OCT-DEC 2016	2ND QUARTER OCT-DEC 2015	3RD QUARTER JAN-MAR 2017	3RD QUARTER JAN-MAR 2016	4TH QUARTER APR-JUNE 2017	4TH QUARTER APR-JUNE 2016	TOTALS
REVENUE									
A&E	\$ 319,683.14	\$ 256,637.36		\$ 282,645.00		\$ 382,045.00		\$ 365,756.00	
CASE AND COMPLAINT REVENUE	14,500.00	-		-		-		5,700.00	
STATE REGULATORY FEE	-	-		-		-		(91,340.00)	
	\$ 334,183.14	\$ 256,637.36		\$ 282,645.00		\$ 382,045.00		\$ 280,116.00	
EXPENDITURES									
REGULAR SALARIES & WAGES	\$ 63,995.00	60,117.72		\$ 58,932.00		60,688.00		59,592.00	
PART-TIME SALARIES & WAGES (PER DIEM)	3,050.00	3,250.00		3,650.00		2,500.00		4,150.00	
EMPLOYEE BENEFITS	25,818.66	24,610.38		24,490.27		25,988.88		24,910.61	
IN-STATE TRAVEL	4,617.11	5,434.53		12,354.56		3,625.81		8,651.34	
OUT-OF-STATE TRAVEL	6,868.38	9,078.70		2,159.86		1,460.19		1,339.96	
PRINTING & DUPLICATING	-	-		-		-		-	
COMMUNICATIONS & SHIPPING COSTS	4,002.72	3,288.28		4,495.32		3,832.30		4,689.16	
MAINTENANCE & REPAIRS	-	-		-		-		140.00	
THIRD PARTY PROFESSIONAL SERVICES	4,438.23	2,940.58		25,015.82		18,077.47		15,024.62	
SUPPLIES & OFFICE FURNITURE	734.34	301.76		45.58		379.99		512.74	
RENTALS & INSURANCE	-	-		78.32		234.96		3,637.06	
GRANTS & SUBSIDIES	-	-		(17,849.12)		308,700.00		-	
TRAINING OF STATE EMPLOYEES	1,750.00	4,375.00		325.00		2,765.00		665.00	
COMPUTER RELATED ITEMS	451.75	576.63		411.48		-		-	
STATE PROFESSIONAL SERVICES	8,411.47	10,720.03		12,153.78		8,532.42		11,758.47	
TOTAL DIRECT EXPENDITURES	\$ 124,137.66	\$ 124,693.61		\$ 126,262.87		436,785.02		135,070.96	
COST BACKS									
DEPARTMENT								157,271.00	
INVESTIGATIONS								-	
LEGAL								73,469.00	
CUSTOMER SERVICE CENTER								9,751.45	
TOTAL COST BACKS								240,491.45	
TOTAL EXPENDITURES	\$ 124,137.66	\$ 124,693.61		\$ 126,262.87		436,785.02		375,562.41	
YTD RESERVE	\$ 210,045.48	\$ 131,943.75		\$ 288,325.88		233,585.86		138,139.45	
BALANCE ADJUSTMENTS								-	
ACCUMULATED RESERVE								1,651,701.15	

NOTES: Training of State Employees includes registration fees for national council meetings; State Professional Services includes printing by state agencies and lease of office space.

MONTHLY EXPENDITURE DETAIL
FY 2016-2017

MONTHLY EXPENDITURE DETAIL
FY 2016-2017

JULY 2016

REGULAR SALARIES & WAGES	\$ 22,065.00
PART-TIME SALARIES & WAGES (PER DIEM)	\$ 650.00
EMPLOYEE BENEFITS	\$ 8,744.40

IN-STATE TRAVEL

In-State Mileage	\$ 282.94
In-State Airfare	\$ -
In-State Meals & Incidentals	\$ 88.50
In-State Lodging	\$ -
In-State Travel--Other	\$ 85.76
	<u>\$ 457.20</u>

OUT-OF-STATE TRAVEL

Out-of-State Airfare	\$ -
Out-of-State Travel--Other	\$ 36.00
Out-of-State Meals	\$ 259.00
Out-of-State Mileage	\$ -
Out-of-State Lodging	\$ 1,214.88
	<u>\$ 1,509.88</u>

PRINTING & DUPLICATING

\$ -

COMMUNICATIONS & SHIPPING COSTS

Telecommunications	\$ -
Postal Charges	\$ 1,252.06
Freight & Express Charges	\$ -
	<u>\$ 1,252.06</u>

MAINTENANCE & REPAIRS

\$ -

THIRD PARTY PROFESSIONAL SERVICES

Court Reporter Services	\$ -
Document Destruction Services	\$ 27.12
General Business Consulting Svcs	\$ -
Organization Memberships/Dues	\$ -
Other Legal Services	\$ -
Other	\$ -
Consulting Services--Testing Services	\$ -
	<u>\$ 27.12</u>

SUPPLIES & OFFICE FURNITURE

Office Supplies & Furniture	\$ 3.38
Training Supplies	\$ -
Sensitive Minor Equipment	\$ -
	<u>\$ 3.38</u>

RENTALS & INSURANCE

Rent or Lease of Buildings	\$ -
Rent or Lease of Reproduction Equipment	\$ -
	<u>\$ -</u>

GRANTS & SUBSIDIES

\$ -

MONTHLY EXPENDITURE DETAIL
FY 2016-2017

TRAINING OF STATE EMPLOYEES

In-Service Training	\$	-
Out-Service Training	\$	-
	<u>\$</u>	<u>-</u>

COMPUTER RELATED ITEMS

Maintenance of Equipment	\$	-
Data Processing Supplies	\$	-
Rent or Lease of Data Processing Equip.	\$	78.32 copier costs
Data Processing Services (Non-State)	\$	-
Sensitive Minor Computers	\$	-
	<u>\$</u>	<u>78.32</u>

STATE PROFESSIONAL SERVICES

Data Processing Services (F&A, OIR)	\$	-
Statewide Accounting Billing	\$	-
Telephone Billing	\$	-
Payroll Billing	\$	-
Lock Box Billing	\$	-
Attorney General Billings	\$	-
Administrative Judges Billing (SOS)	\$	-
Agency Internal Administrative Costs	\$	-
Agency Internal Info Systems Costs	\$	-
Printing & Reproduction by State Agencies	\$	-
State-Owned Vehicle Charges	\$	-
Other	\$	-
	<u>\$</u>	<u>-</u>

TOTAL JULY 2016 **\$ 34,787.36**

AUGUST 2016

REGULAR SALARIES & WAGES	\$ 19,865.00
PART-TIME SALARIES & WAGES (PER DIEM)	\$ 2,100.00
EMPLOYEE BENEFITS	\$ 8,356.62

IN-STATE TRAVEL

In-State Mileage	\$	1,318.82
In-State Airfare	\$	-
In-State Meals & Incidentals	\$	708.00
In-State Lodging	\$	1,356.88
In-State Travel--Other	\$	187.91
	<u>\$</u>	<u>3,571.61</u>

OUT-OF-STATE TRAVEL

Out-of-State Airfare	\$	633.90
Out-of-State Travel--Other	\$	120.00
Out-of-State Meals	\$	540.00
Out-of-State Mileage	\$	541.44
Out-of-State Lodging	\$	1,884.87
	<u>\$</u>	<u>3,720.21</u>

PRINTING & DUPLICATING **\$ -**

COMMUNICATIONS & SHIPPING COSTS

Telecommunications	\$	-
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MONTHLY EXPENDITURE DETAIL
FY 2016-2017

Postal Charges	\$	1,282.62	
Freight & Express Charges	\$	-	
	\$	1,282.62	
MAINTENANCE & REPAIRS	\$	-	
THIRD PARTY PROFESSIONAL SERVICES			
Court Reporter Services	\$	-	
Document Destruction Services	\$	13.56	
General Business Consulting Svcs			
Credit Card Fees (online renewal)	\$	2,497.71	
Organization Memberships/Dues	\$	-	
Other Legal Services	\$	-	
Other	\$	-	
Consulting Services--Testing Services	\$	-	
	\$	2,511.27	
SUPPLIES & OFFICE FURNITURE			
Office Supplies & Furniture	\$	727.58	
Training Supplies	\$	-	
Sensitive Minor Equipment	\$	-	
	\$	727.58	
RENTALS & INSURANCE			
Rent or Lease of Buildings	\$	-	
Rent or Lease of Equipment	\$	-	
Rent or Lease of Reproduction Equipment	\$	-	
	\$	-	
GRANTS & SUBSIDIES	\$	-	
TRAINING OF STATE EMPLOYEES			
In-Service Training	\$	-	
Out-Service Training	\$	950.00	CLARB meeting reg. fee
	\$	950.00	
COMPUTER RELATED ITEMS			
Maintenance of Equipment	\$	-	
Data Processing Supplies	\$	216.79	
Rent or Lease of Data Processing Equip.	\$	78.32	copier costs
Data Processing Services (Non-State)	\$	-	
Sensitive Minor Computers	\$	-	
	\$	295.11	
STATE PROFESSIONAL SERVICES			
Data Processing Services (F&A, OIR)	\$	-	
Statewide Accounting Billing	\$	-	
Telephone Billing	\$	289.21	
Payroll Billing	\$	-	
Lock Box Billing	\$	-	
Attorney General Billings	\$	-	
Administrative Judges Billing (SOS)	\$	-	
Agency Internal Administrative Costs	\$	-	
Agency Internal Info Systems Costs	\$	-	
Printing & Reproduction by State Agencies	\$	2,559.80	
Rent or Lease of State Buildings	\$	2,631.40	
State-Owned Vehicle Charges	\$	-	
Other	\$	-	

MONTHLY EXPENDITURE DETAIL
FY 2016-2017

	\$	5,480.41
TOTAL AUGUST 2016	\$	48,860.43

SEPTEMBER 2016

REGULAR SALARIES & WAGES	\$	22,065.00
PART-TIME SALARIES & WAGES (PER DIEM)	\$	300.00
EMPLOYEE BENEFITS	\$	8,717.64

IN-STATE TRAVEL

In-State Mileage	\$	245.34
In-State Airfare	\$	-
In-State Meals & Incidentals	\$	88.50
In-State Lodging	\$	169.61
In-State Travel--Other	\$	<u>84.85</u>
	\$	588.30

OUT-OF-STATE TRAVEL

Out-of-State Airfare	\$	-
Out-of-State Travel--Other	\$	132.00
Out-of-State Meals	\$	349.00
Out-of-State Mileage	\$	-
Out-of-State Lodging	\$	<u>1,157.29</u>
	\$	1,638.29

PRINTING & DUPLICATING

\$ -

COMMUNICATIONS & SHIPPING COSTS

Telecommunications	\$	-
Postal Charges	\$	1,468.04
Freight & Express Charges	\$	<u>-</u>
	\$	1,468.04

MAINTENANCE & REPAIRS

\$ -

THIRD PARTY PROFESSIONAL SERVICES

Court Reporter Services	\$	-
Document Destruction Services	\$	27.12
General Business Consulting Svcs		
Credit Card Fees (online renewal)	\$	1,872.72
Organization Memberships/Dues	\$	-
Other Legal Services	\$	-
Other	\$	-
Consulting Services--Testing Services	\$	<u>-</u>
	\$	1,899.84

SUPPLIES & OFFICE FURNITURE

Office Supplies & Furniture	\$	3.38
Training Supplies	\$	-
Food and Beverages	\$	-
Sensitive Minor Equipment	\$	<u>-</u>
	\$	3.38

RENTALS & INSURANCE

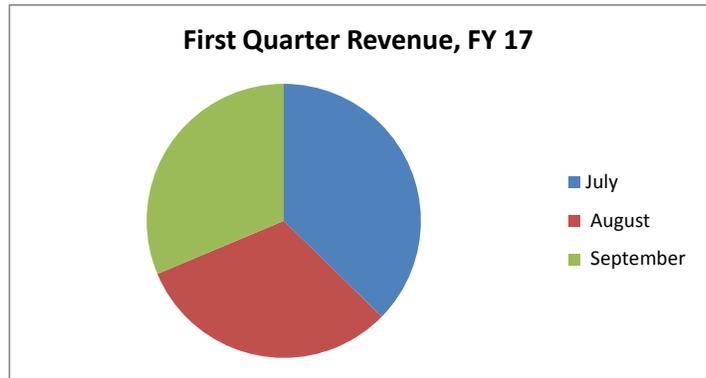
Rent or Lease of Buildings	\$	-
Rent or Lease of Equipment	\$	-

MONTHLY EXPENDITURE DETAIL
FY 2016-2017

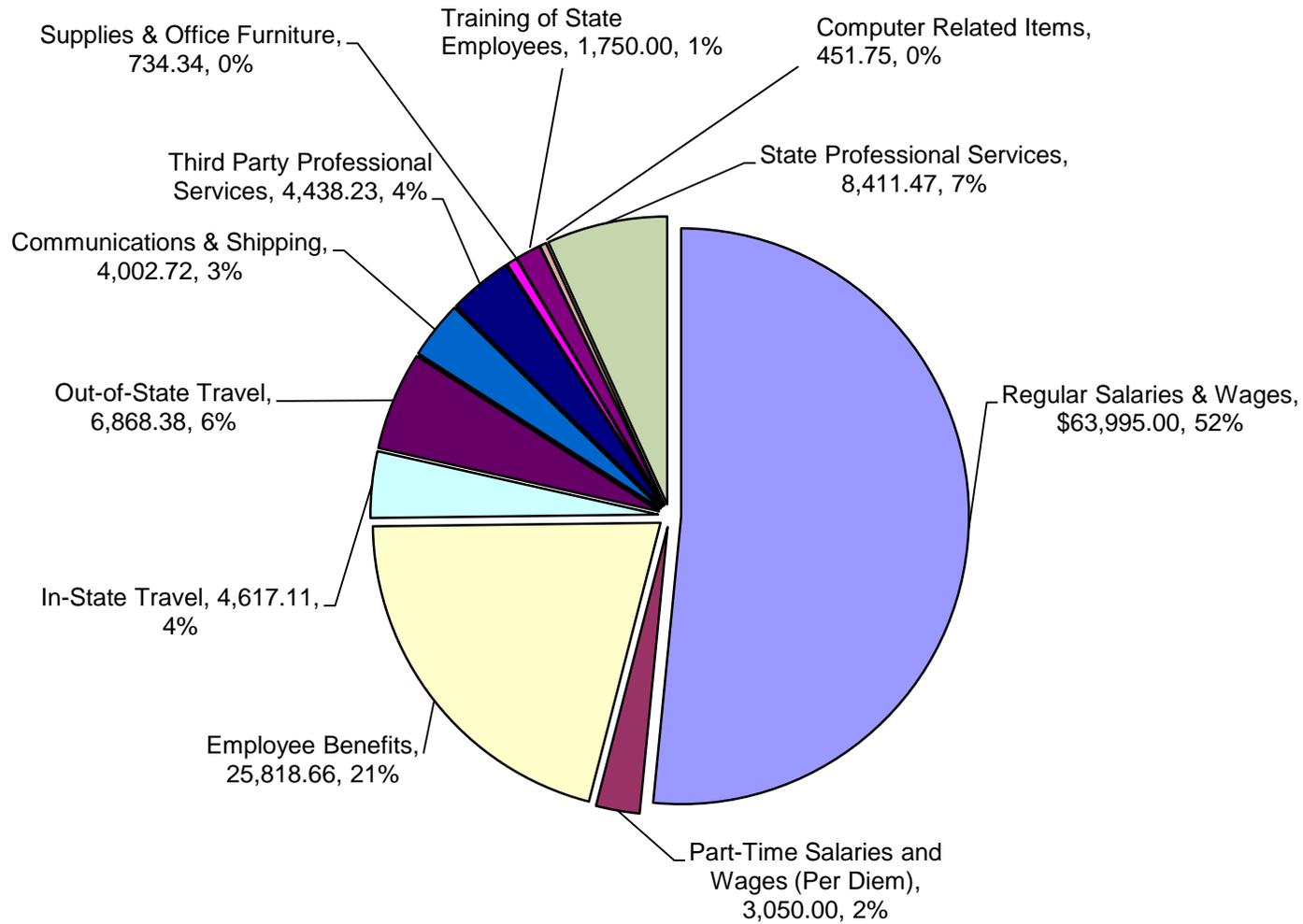
Rent or Lease of Reproduction Equipment	\$ -	
	<u>\$ -</u>	
GRANTS & SUBSIDIES	\$ -	
TRAINING OF STATE EMPLOYEES		
In-Service Training	\$ -	
Out-Service Training	\$ 800.00	CLARB meeting reg. fee
	<u>\$ 800.00</u>	
COMPUTER RELATED ITEMS		
Maintenance of Equipment	\$ -	
Data Processing Supplies	\$ -	
Rent or Lease of Data Processing Equip.	\$ 78.32	
Data Processing Services (Non-State)	\$ -	
Sensitive Minor Computers	\$ -	
	<u>\$ 78.32</u>	
STATE PROFESSIONAL SERVICES		
Data Processing Services (F&A, OIR)	\$ -	
Statewide Accounting Billing	\$ -	
Telephone Billing	\$ 299.66	
Payroll Billing	\$ -	
Lock Box Billing	\$ -	
Attorney General Billings	\$ -	
Administrative Judges Billing (SOS)	\$ -	
Agency Internal Administrative Costs	\$ -	
Agency Internal Info Systems Costs	\$ -	
Printing & Reproduction by State Agencies	\$ -	
Rent or Lease of State Buildings	\$ 2,631.40	
State-Owned Vehicle Charges	\$ -	
Other	\$ -	
	<u>\$ 2,931.06</u>	
TOTAL SEPTEMBER 2016	\$ 40,489.87	

**MONTHLY REVENUE BREAKDOWN
FY 2016-2017**

	A&E	Case & Complaint	Total
First Quarter			
July	\$ 124,730.00	\$ -	\$ 124,730.00
August	\$ 92,750.00	\$ 12,000.00	\$ 104,750.00
September	\$ 102,203.14	\$ 2,500.00	\$ 104,703.14
	\$ 319,683.14	\$ 14,500.00	\$ 334,183.14
Second Quarter			
October			
November			
December			
Third Quarter			
January			
February			
March			
Fourth Quarter			
April			
May			
June			
Total	\$ 319,683.14	\$ 14,500.00	\$ 334,183.14



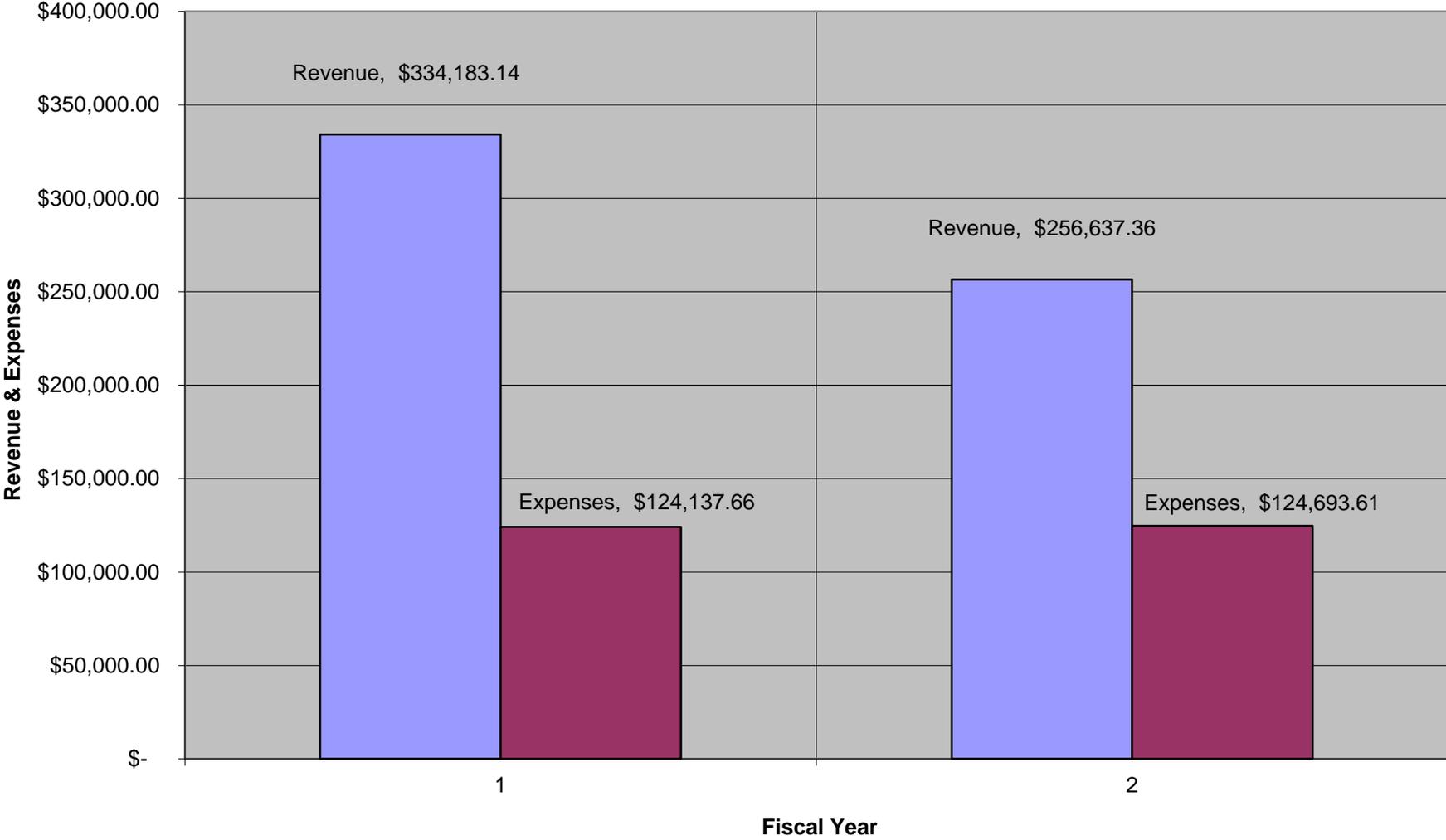
Expenditures--1st Quarter, FY 2017
Total Direct Expenditures: \$124,137.66



1st Quarter Comparison

FY 2017

FY 2016



**Board of Architectural and Engineering Examiners
Open Complaints**

	Profession	Complaint #	Received	Allegation	Status	Comments	
1	Architect	201605409	9/14/2016	Practice outside area(s) of competency.	Open-Legal	Board member review	
2	Engineer	201402889	11/12/2014	Practice outside area(s) of competency.	Open-Legal	Litigation monitoring	
3	Engineer	2015022177	11/19/2015	Practice outside area(s) of competency.	Open-Legal	Issued consent order	
4	Engineer	201604915	8/18/2016	Practice outside area(s) of competency; plan stamping.	Open-Legal	Board member review	
5	Engineer	201605364	9/1/2016	Practice on an expired license.	Open-Legal	Issued consent order	
6	Engineer	201605395	9/12/2016	Practice outside area(s) of competency.	Open-Legal	Board member review	
7	Engineer	201606638	11/1/2016	Disciplined in another jurisdiction.	Open-Staff	Issued letter of caution	
8	Engineer	201606731	11/9/2016	Disciplined in another jurisdiction.	Open-Staff	Issued letter of caution	
9	Engineer	201606888	11/17/2016	Practice outside area(s) of competency; plan stamping.	Open-Staff	Response requested	
10	Engineer	201606906	11/15/2016	Disciplined in another jurisdiction.	Open-Staff	Response requested	
11	Engineer	201606933	11/16/2016	Misconduct; fraudulent practice.	Open-Staff	Response requested	
12	Eng Firm	201606674	11/1/2016	Disciplined in another jurisdiction.	Open-Staff	Issued letter of caution	
13	Eng Firm	201606679	11/1/2016	Disciplined in another jurisdiction.	Open-Staff	Issued letter of caution	
14	Eng Firm	201606683	11/1/2016	Disciplined in another jurisdiction.	Open-Staff	Issued letter of caution	
15	Eng Firm	201606685	11/2/2016	Disciplined in another jurisdiction.	Open-Staff	Issued letter of caution	
16	Int Des	201604906	8/11/2016	Continuing education violation.	Open-Legal		
	Number over 180 days old without "clock stopping" action: 0 (0%)						
	Number of formal hearings authorized to be heard by ALJ: 0						
	Number of formal hearings authorized to be heard by Board: 0						
	Number in Investigations: 0						
	Percent on time (clock stopped within 180 days) last 18 months: 96.36%						

Number of Registrants and Firms

Architects	In-State	Out-of-State	Total
2/3/2016	1524	2288	3812
5/24/2016	1533	2287	3820
9/28/2016	1521	2276	3797
11/22/2016	1510	2285	3795

Engineers	In-State	Out-of-State	Total
2/3/2016	7383	8349	15,732
5/24/2016	7288	8389	15,677
9/28/2016	7231	8297	15,528
11/22/2016	7232	8313	15,545

Landscape Architects	In-State	Out-of-State	Total
2/3/2016	199	186	385
5/24/2016	202	185	387
9/28/2016	201	182	383
11/22/2016	204	179	383

Interior Designers	In-State	Out-of-State	Total
2/3/2016	391	43	434
5/24/2016	382	42	424
9/28/2016	374	40	414
11/22/2016	368	40	408

Totals (Registrants)	In-State	Out-of-State	Total
2/3/2016	9,497	10,866	20,363
5/24/2016	9,405	10,903	20,308
9/28/2016	9,327	10,795	20,122
11/22/2016	9,314	10,817	20,131

Architectural Firms	In-State	Out-of-State	Total
2/3/2016	442	1195	1637
5/24/2016	443	1244	1687
9/28/2016	443	1287	1730
11/22/2016	444	1311	1755

Engineering Firms	In-State	Out-of-State	Total
2/3/2016	924	2726	3650
5/24/2016	938	2836	3774
9/28/2016	955	2915	3870
11/22/2016	961	2964	3925

Landscape Arch Firms	In-State	Out-of-State	Total
2/3/2016	51	99	150
5/24/2016	52	103	155
9/28/2016	55	108	163
11/22/2016	56	113	169

Totals (Firms)	In-State	Out-of-State	Total
2/3/2016	1417	4020	5437
5/24/2016	1433	4183	5616
9/28/2016	1453	4310	5763
11/22/2016	1461	4388	5849

Action Items (December 2016)

John Cothron

- Invite a representative of the Association of Energy Engineers (AEE) to attend an Engineer Committee meeting to discuss the certifications they offer.
- Route revised *Reference Manual* to proper authorities for review.
- Research the history of the design competitions/RFPs/RFQs policy and which jurisdictions allow unlicensed design professionals to participate in design competitions or respond to RFPs or RFQs.
- Research how many jurisdictions have an exemption from the FE exam, how many applicants apply under the FE waiver provision, and how eliminating this waiver would impact comity registration.
- Submit the signed Letter of Undertaking with respect to the Mutual Recognition Arrangement with Australia and New Zealand to NCARB.
- Send the signed Memorandum of Understanding with the Japan PE/FE Examiners Council (JPEC) to JPEC for review and signature.
- Invite a NCEES representative(s) to attend a future Board meeting.

Legal Counsel

- Provide an opinion on the submission of historical data and hourly rates in response to a Request for Qualifications (RFQ).
- Draft proposed rule changes discussed at the October meeting.
- Provide a legal opinion on the meaning of “offer to practice” (requested during discussion of the policy on design competitions/RFPs/RFQs).
- Review the different procurement models for state projects as presented by State Architect Peter Heimbach and how they relate to qualifications-based selection of design professionals.

Ricky Bursi/Robert Campbell

- Write a newsletter article regarding the experience requirements for engineer registration.

2018 Legislative Proposal: Eliminate the experience duration requirement in the law for architect exam applicants, and require simply completion of the Intern Development Program (IDP)/Architectural Experience Program (AXP) for these applicants.

REPORT ON 2016 CIDQ ANNUAL DELEGATES MEETING FORT LAUDERDALE, FL

Attendees: Susan Ballard (Board Member) and John Cothron (Executive Director)

The following issues were discussed at the CIDQ Annual Delegates Meeting on November 11-12, 2016:

- This year's conference theme was *Evolution*, and emphasis was placed on improved communication with all stakeholders.
- Kay Sargent delivered a keynote presentation on the state of the interior design profession, and Shelley Siegel delivered a presentation on changes in accessibility.
- CIDQ Updates:
 - Thom Banks was introduced as the new Executive Director of CIDQ.
 - CIDQ has realigned staff positions and moved to a more cost-effective office space in Alexandria, Virginia.
 - The Bylaws Task Force presented proposed revisions to CIDQ's Bylaws, which will resolve existing conflicts and inconsistencies. Revised Bylaws will be distributed to member boards for adoption.
 - Revenue and the number of certificate holders continue to grow. There are now over 30,000 certificate holders.
 - NCIDQ exam changes:
 - Senior students can now sit for the Interior Design Fundamentals Exam (IDFX).
 - Exam content has been adjusted following a practice analysis.
 - The testing window has been extended to one (1) month for computer-based exams.
 - Score reports have been revised to provide more feedback to candidates.
 - The Practicum exam will be computerized in fall 2017.
 - CIDQ issued a survey to 450 design leaders at large firms across the U.S. and Canada in an effort to better understand how CIDQ can support these firms' employees through the certification process.
 - CIDQ has increased communication with potential test takers, becoming more active online and through social media to better reach this target audience.
 - The Ambassador program, which engages more than 300 certificate holders, has been revamped to provide volunteers with improved training and resources.
 - A demo of CIDQ's new website was shared with delegates. The new website will include a searchable database of NCIDQ certificate holders.
 - A small jurisdiction grant program will begin in 2017 to reduce CIDQ dues for member boards with 50 or fewer registrants.
- Professional Organization Updates:
 - The Council for Interior Design Accreditation (CIDA) reported that there are currently 186 accredited interior design programs (171 bachelors, 10 masters, 5

bachelors and masters). Of these, 175 are in the U.S, 9 in Canada, and 2 overseas.

- The Interior Design Continuing Education Council (IDCEC) will begin random audits of continuing education providers using volunteers in 2017. There are currently 480 registered continuing education providers.
- Member Board Updates:
 - The Florida Board has not met recently due to anti-trust concerns related to the *North Carolina State Board of Dental Examiners v. FTC* Supreme Court decision.
 - Louisiana has a practice act for interior designers, but no permitting privileges. The Louisiana State Fire Marshal's office and architects in the state oppose granting permitting privileges to interior designers.
 - The Oklahoma Board started a scholarship foundation last year; their Attorney General must approve all Board decisions.
 - Several jurisdictions expressed concerns about deregulation of the interior design profession. Proposed federal legislation could end interior design licensure in D.C.
 - Use of the term "interior architecture" by interior design programs continues to be a matter of concern to state boards. According to CIDA, 20 out of 186 accredited interior design programs (11%) are designated "interior architecture" programs.
- Roundtable Discussions: Several ideas and topics were discussed during roundtable discussions, including:
 - Proposed Bylaws revisions.
 - NCIDQ Exam Practicum 2.0.
 - Increasing CIDQ member board value. Suggestions included developing Model Law/Rules, requiring state registration (if available) to maintain NCIDQ certification, sharing more data with states regarding exam candidates and certificate holders, and developing a disciplinary database.
 - Alternative Application Review Program (AARP)—a new program providing an alternate path to NCIDQ certification for broadly experienced interior designers who do not qualify under the standard routes.
- The 2017 Annual Meeting is scheduled for November 10-11 in Alexandria, Virginia.