



Professional Engineers
Ontario

Professional Engineers Ontario

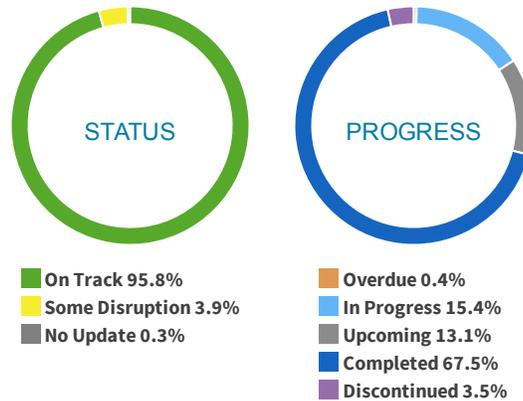
Executive Report

Strategic Plan Update #6

Strategic Plan Progress as at May 20, 2016

Created on: May 20, 2016

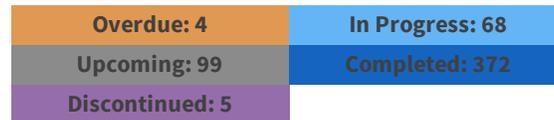
Strategic Plan Progress as at May 20, 2016



Total Assignment: 74



Total Activity: 548



Strategic Objective: 24

Strategy: 116

Activity: 548

Summary

As of May 20, 2016, of the 116 Strategies identified in the Strategic Plan, 57 (50) have been completed, 58 (63) are in progress and 1 (13) has yet to commence.

In terms of Activities associated with specific Strategies, 71.03% (66.2%) of these have been completed, another 15.7% (12.4%) of the Activities are in progress, and 13.2% (21.3%) of the Activities have yet to commence.

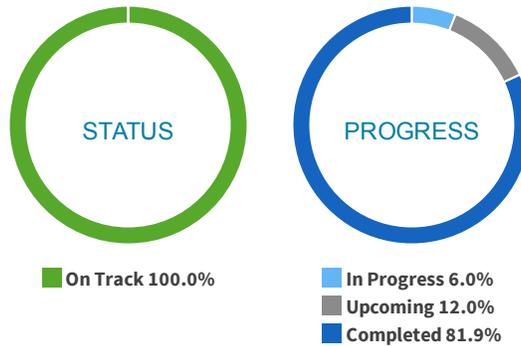
The overwhelming majority of Activities in progress are deemed to be "On Track" at this point. There have been some slight delays noted with respect to the Data Collection Project related to the Industrial Exception, due largely to delay with respect to Freedom of Information requests.

(n.b. numbers in brackets represent the totals from the previous update report)

Strategic Objective 1



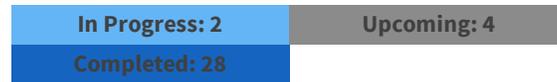
PRACTITIONERS - Public interest is enhanced through ensuring qualified applicants are licensed to practise professional engineering and that practitioners are competent and ethical



Total Assignment: 2



Total Activity: 34



Strategy: 6

Activity: 34

Strategy 1.1



Introduce two performance standards related to Tower Cranes and Supervising & Delegating. Establish these in regulations and promote their use

STATUS
PENDING



Completed 100.0%

Activity: 3

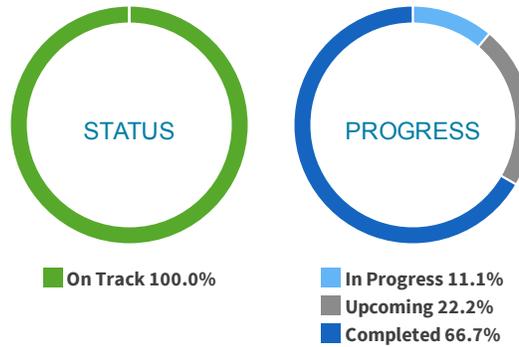
Last update: Feb 22, 2016

Completed the Tower Crane Review Standard. March/April Engineering Dimensions to inform membership.

Strategy 1.2



Engage an assessment expert to review the ERC interview process for applicants that have been referred by the ARC



Activity: 9

Last update: May 11, 2016

ERC to determine process for improvement: (30% Completed)

ERC subcommittee presented their report on the consultant's recommendations to the ERC at the business meeting of April 22, 2016. The subcommittee proposed proceeding with 8 of the 10 recommendations at this time with another review of the remaining ones later. The ERC directed the subcommittee to proceed with the 8 recommendations.

Process to be completed by October 2016 with recommendations implemented by Q2 2017

Strategy 1.3



Establish process to close Inactive files in a timely manner

STATUS
PENDING



Completed 100.0%

Activity: 7

Last update: Aug 27, 2015

Project Completed

Strategy 1.4



Provide information to prospective applicants through increased seminars and webinars

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Jan 05, 2016

Offer Seminars to International Engineering Graduates: (100% Completed)

31 Seminars were conducted in 2015 and more than 900 participants attended.

Strategy 1.5



Develop a Professional Practice Exam (PPE) distance learning module for EITs to improve access and enhance the learning

STATUS
PENDING



Completed 100.0%

Activity: 7

Last update: Mar 04, 2015

Professional Practice Exam (PPE) Training Requirements: (100% Completed) Professional Practice Exam Training Requirements have been documented. Next step is to prepare training materials.

Prepare training materials : (100% Completed) All the training materials have been identified and prepared. Next step is to produce training materials.

Produce Training Module Materials : (100% Completed) Training materials required for the online module have been prepared. Next step is to schedule video shoot.

Schedule Video Shoot: (100% Completed) Online module video shoot has been scheduled. Next step is to video shoot with Scholarlab.

Video Shoot with Scholarlab: (100% Completed) Professional Practice Exam (PPE) online video is available for viewing on the Scholarlab website. Next step is to update PEO presentations and website with link to the Professional Practice Exam (PPE) online module.

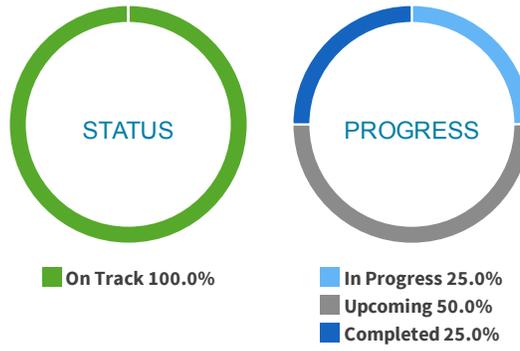
Update PEO materials : (100% Completed) PEO presentations and website with link to the Professional Practice Exam (PPE) have been updated. Next step is to communicate about the PPE online module to the applicants eligible to write PPE.

Communicate the availability of Professional Practice Exam (PPE) online module: (100% Completed) PPE are scheduled each year in April, October and December. Exam Center will extract from PEO database a list of applicants eligible to appear in the upcoming Professional Practice Exam. Going forward, Exam Center will be including the PPE online module link in the invitation letter going out to the applicants eligible to write Professional Practice Exam. This will ensure that the applicants will be able to view the PPE online module in order to prepare for writing the PPE. The PPE online module is currently being used by the applicants and we have been receiving positive feedback about the module. The project is completed.

Strategy 1.6



Supervising and Delegating Engineering Practice Policy
Implications Review



Activity: 4

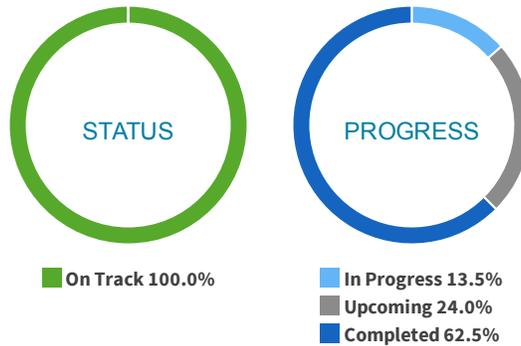
Last update: May 10, 2016

The PSC will seek Council approval to rescind original direction to produce a standard and propose to develop a guideline to achieve the best practices outlined in the current draft document (i.e. standard). Expect to complete this strategy by mid 2017.

Strategic Objective 2



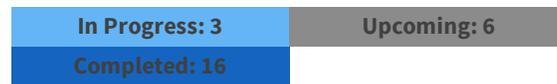
PRACTITIONERS - Public recognition is increased through ensuring that titles, designations, certificates and marks are issued to qualified applicants and entities



Total Assignment: 3



Total Activity: 25



Strategy: 4

Activity: 25

Strategy 2.1



Conduct reputation survey to determine attitudes of licence holders and stakeholders towards PEO for ongoing project of enhancing public recognition



Activity: 7

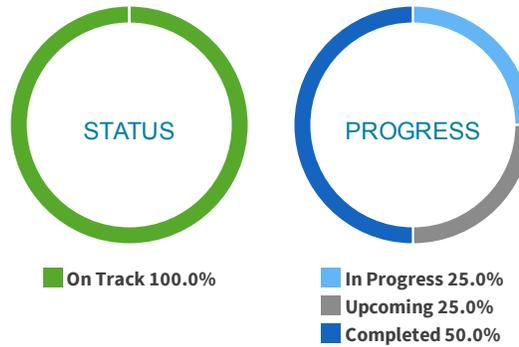
Last update: Nov 11, 2015

Report has been circulated to PSC and it does not require any further action. Completed.

Strategy 2.2



Develop and implement communications plan around the LET/LL and C of A regulation changes to independent practice



Activity: 4

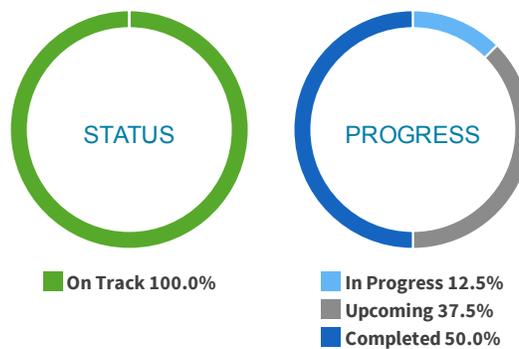
Last update: May 11, 2016

Implementation of the approved communications plan continues. Latest activities include: Licensed Engineering Technologist stamp approved by Council March 2016. Limited licence certificate and stamp updated for new title. President's message in March/April 2016 Engineering Dimensions and 2015 Annual Review mention LET. First LET presented May 12 with photographs and media release. Articles to appear in July issues of Engineering Dimensions and Ontario Technologist. Strategy expected to be completed by June 30, 2017.

Strategy 2.3



Develop and implement a targeted communications plan to encourage internationally trained engineers to become licensed



Activity: 8

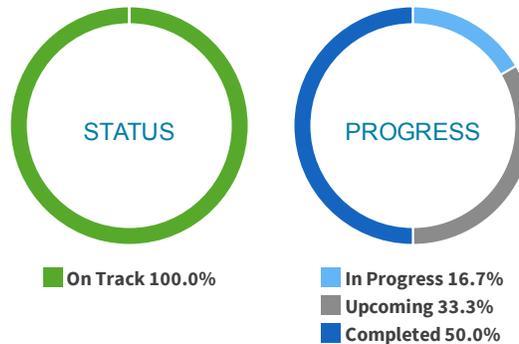
Last update: May 11, 2016

Communications plan implementation continues. Latest activities: PEO Newcomers brochure updated, reprinted and included in delegate bags for 2000-attendee Newcomers Canada Career and Settlement Fair April 30 in Toronto. PEO booth booked for same event in October 2016. PEO ad for ACCESS Employment's speed mentoring event May 18 updated. Newcomers brochure provided for delegate packages. Strategy is expected to be completed by July 2017.

Strategy 2.4



Communications Infrastructure Engineering outreach and licensure.



Activity: 6

Last update: May 11, 2016

Preliminary Assessment of Potential Applicant Backgrounds: (100% Completed)

ARC Members and staff completed preliminary assessments by March 15, 2016

EDTF to meet with ARC to confirm Academic Requirements for Licensure: (100% Completed)

Meeting of Working group including ARC and EDTF representatives held on May 13 to discuss assessments

EDTF to meet with ERC to confirm Experience Requirements for Licensure: (100% Completed)

Working Group meeting on May 13 included representatives from ERC and EDTF

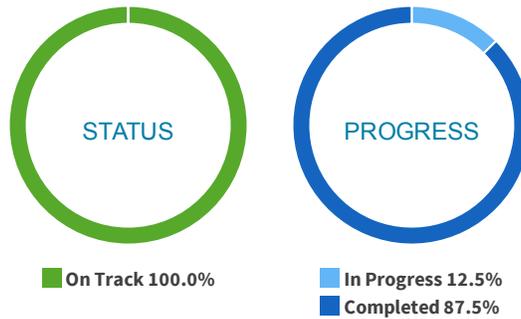
EDTF Develops Outreach plan Based on ARC and ERC Agreement of Licensure Requirements: (25% Completed)

Preliminary Outreach plan developed for presentation to Working Group

Strategic Objective 3



PRACTITIONERS - Members regard PEO as their trusted advisor and advocate in matters of professional practice



Total Assignment: 1



Total Activity: 6



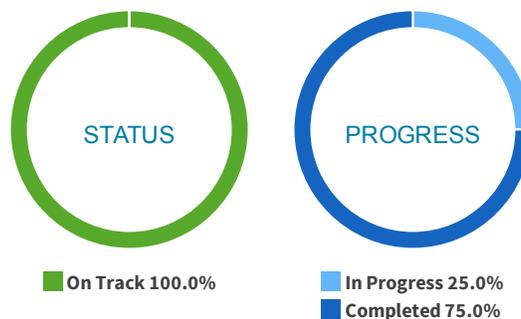
Strategy: 2

Activity: 6

Strategy 3.1



Produce an educational program to inform members about the role of the PSC and the services that Practice Advisory can offer to practitioners, and promote their use



Activity: 4

Last update: May 10, 2016

The webinar content is ready. Scheduling with IT resources to develop the webinars.

Strategy 3.2



Explore the merits of developing a practice guide for PEO members practicing internationally

STATUS
PENDING



■ Completed 100.0%

Activity: 2

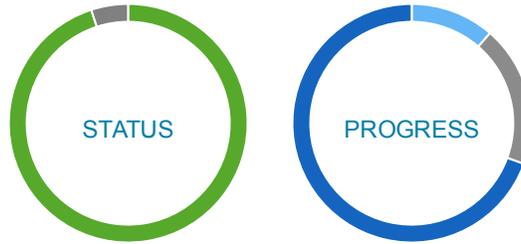
Last update: Mar 05, 2015

A list of international practice calls and 3 extra-jurisdictional discipline cases handled by PEO were provided to PSC. Next steps include having PSC determine if a guideline of this nature is warranted. Anticipate completing this strategy by end of June 2015.

Strategic Objective 4



REGULATORY FRAMEWORK - Elliot Lake Commission of Inquiry recommendations are earnestly implemented



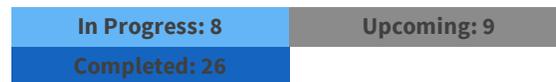
■ On Track 95.0%
■ No Update 5.0%

■ In Progress 11.4%
■ Upcoming 19.2%
■ Completed 69.4%

Total Assignment: 8



Total Activity: 43



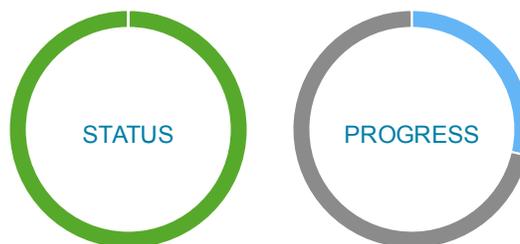
Strategy: 9

Activity: 43

Strategy 4.1



Develop a Performance Standard for structural inspections of existing buildings which will require the production of a Structural Adequacy Report. (Recommendations 1.4 and 1.6)



■ On Track 100.0%

■ In Progress 28.6%
■ Upcoming 71.4%

Activity: 7

Last update: May 10, 2016

Public consultation for the guideline on Structural Conditions Assessments closed on April 29, 2016. Staff compiling the responses that will go to sub-committee to work on the finalizing the guideline. The draft standard will be revised in accordance with input

received on the guideline.

Strategy 4.2



Develop a regulation for a structural engineering specialist title. (Recommendation 1.5)

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Feb 22, 2016

PEO Council's intent for a designation will proceed within the existing regulation making powers under section 7. PEO will not be seeking to amend its legislation to provide authority for an exclusive scope of practice for any specialist designation.

Strategy 4.3



Develop a Performance Standard that will require P.Eng.s to make available, on request, any records in their possession or control related to the structural integrity of a building (Recommendation 1.21)

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Nov 11, 2015

Based on PSC feedback suggesting that the PEAct is not the appropriate vehicle for this recommendation, a briefing note has been prepared for a Council decision at its November meeting.

Strategy 4.4



Develop a Performance Standard instructing P.Eng.s that the contents of an engineering report, or draft report, including a Structural Adequacy Report, should not be altered simply because the client requests that it be changed. Rather, any alteration of an engineering report, or draft report, should be based on sound engineering principles or changed facts. (Recommendation 1.23)



Activity: 3

Last update: Aug 28, 2015

The Professional Standards Committee determined that a performance standard was not the best method to achieve this objective, instead an article in Engineering Dimension outlining the best practices was prepared and will be published in the September/October issue. This completes this strategy.

Strategy 4.5



Under the direction of the CPDCQA Task Force, prepare a plan for a comprehensive program of continuing professional development and quality assurance with a strong focus on competency. (Recommendation 1.24)

STATUS
PENDING



Activity: 5

Last update: Nov 11, 2015

Task force has completed its work. The BN for Council decision is on the November meeting agenda. This completes the activities under this strategy.

Strategy 4.6



Develop a regulation requiring practitioners to advise clients of any suspensions or revocations of their licences, and the reasons therefor, that arise out of disciplinary actions resulting from specific circumstances. (Recommendation 1.25)

STATUS
PENDING



Activity: 3

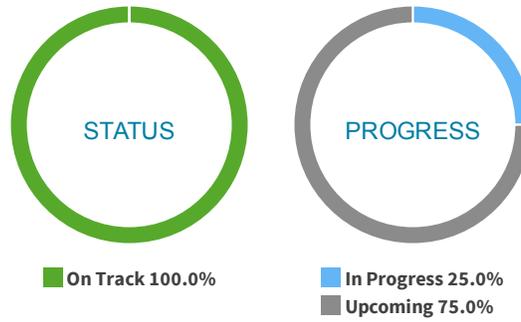
Last update: Aug 28, 2015

Actual draft language to be provided by Attorney General department once PEO decides whether to support or not the recommendation.

Strategy 4.7



Make available specific disciplinary information on the PEO website in a format readily and easily searchable by the name of a practitioner. (Recommendation 1.26)



Activity: 4

Last update: May 13, 2016

One requirements gathering session is complete, one or more follow-up sessions are being planned to gain further details on requirements..

Strategy 4.8



Define, in regulation or legislation, as may be required, the roles and responsibilities of a “Prime Consultant”. (Recommendation 1.27)



Activity: 4

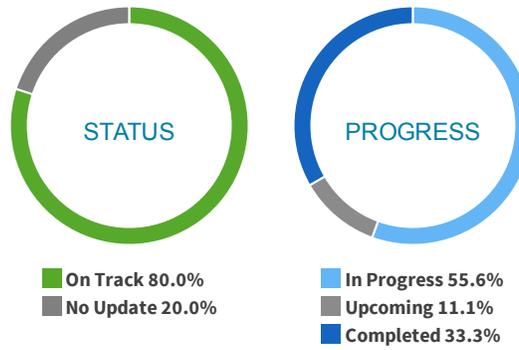
Last update: May 10, 2016

Following the meeting held with MMAH and OAA. The PSC will look to approve the terms of reference for a joint sub-committee of PEO and OAA. Anticipate completing this strategy by mid 2017.

Strategy 4.9



Continuing Professional Competence [CP]2 Task Force



Activity: 9

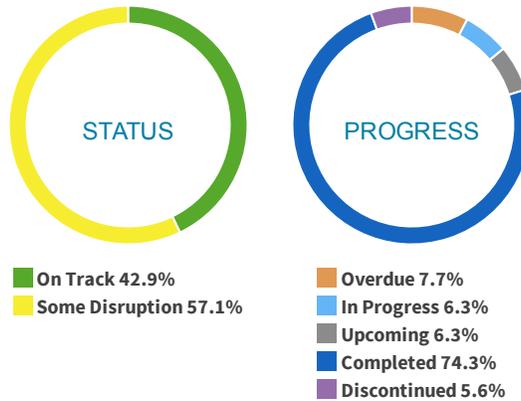
Last update: May 10, 2016

The [CP]2 task force is developing the details for the program and its on-line implementation. Anticipate having a beta website available for focus group testing in the summer 2016. Specifications for the IT infrastructure to provide web access for all members to complete CP reporting is under development. Once approved by task force, PEO's IT resources will deploy the module. Anticipate releasing to the membership in early 2017.

Strategic Objective 5



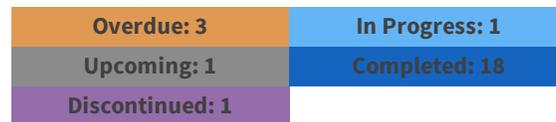
REGULATORY FRAMEWORK - Regulations, standards and guidelines are produced through an evidence-based, integrated and streamlined policy-making process



Total Assignment: 4



Total Activity: 24



Strategy: 7 Activity: 24

Strategy 5.1



Develop and implement an evidence-based regulatory policy development program for staff and committees, including training, tools, and coaching



Activity: 4

Last update: Feb 22, 2016

Completed.

Strategy 5.2



Reorient OCEPP operations to focus on workshops that will gather evidence for regulatory policy development purposes

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Feb 22, 2016

Strategy is complete.

Strategy 5.3



Establish proactive relationships with key ministry officials to help promote regulatory initiatives

STATUS
PENDING



Completed 66.7%
Discontinued 33.3%

Activity: 3

Last update: Feb 22, 2016

Strategy is complete. Based on feedback from ministry staff, best approach is to work on direct issues on a case by case basis. No

need for developing a pamphlet. Meetings will be established on a need basis.

Strategy 5.4



Implement a legislation monitoring program

STATUS
PENDING



Completed 100.0%

Activity: 1

Last update: Mar 05, 2015

Subscribed to News Release updates from key ministries; subscribed to Regulatory Registry for proposed Regulations that is not currently any mechanism to obtain electronic notification from the Legislative Assembly so must rely on ministry releases. Next steps include monitoring and follow up for any additional details. Anticipated completion date end of March 2015.

Strategy 5.5



Develop a mechanism to identify regulatory gaps in the Professional Engineers Act and monitor political environment for opportunities to introduce amendments

STATUS
PENDING



Completed 100.0%

Activity: 4

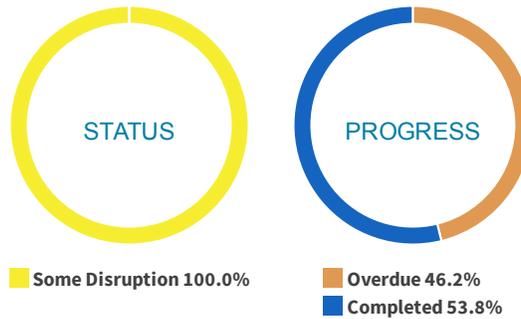
Last update: May 11, 2016

information requested; no additional responses received

Strategy 5.6



Review strength of rationale for repealing the industrial exception



Activity: 6

Last update: May 13, 2016

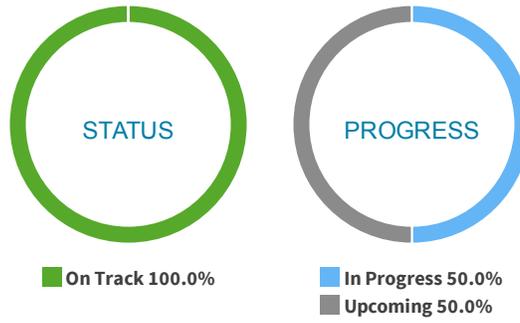
Collection of relevant accident data continues, but delay has been encountered due to the limitations of the FOI process required to obtain MOL documents. The bulk of MOL documents was expected by end of December, 2015, however these documents only arrived as of end of April, 2016.

The final project report is still expected to be issued in June 2016.

Strategy 5.7



Practitioner Research Project



Activity: 2

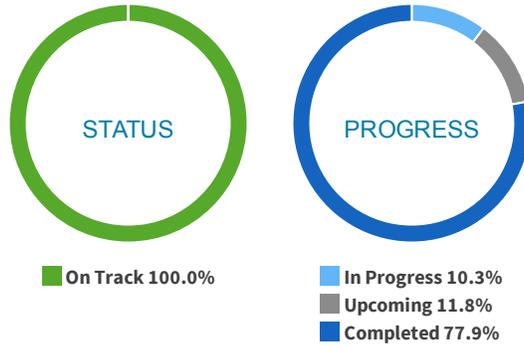
Last update: May 10, 2016

Final stages of Phase 1. Survey validation is complete. Next steps includes review of research findings and problem definition. Anticiapte completing htis strategy by end of 2016.

Strategic Objective 6



REGULATORY FRAMEWORK - Licensing is based on levels of competence



Total Assignment: 3



Total Activity: 19



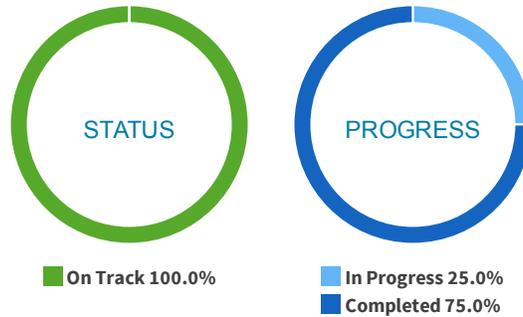
Strategy: 5

Activity: 19

Strategy 6.1



Contribute to Engineers Canada initiatives to address maximization of common standards in issues of national interest



Activity: 4

Last update: May 11, 2016

Attend Engineers Canada National Admissions Officials Meetings: (90% Completed)

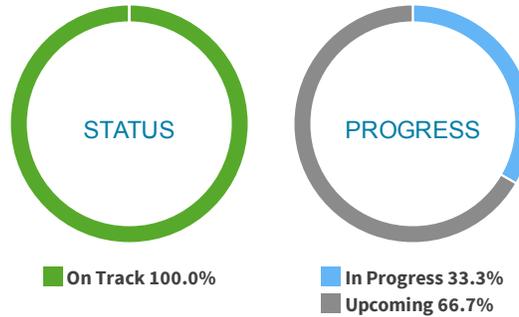
Annual face-to-face meeting scheduled for June 8 and 9 to include exam offerings, registration frequency and interprovincial mobility

Monitor and provide feedback on Engineers Canada Admissions related activities.

Strategy 6.2



Contribute to APEGBC Canadian Environment Experience Requirement Project Steering Committee and assess recommendations for potential implementation



Activity: 3

Last update: May 11, 2016

Continue to participate in APEGBC Canadian Environment Experience Steering Committee: (60% Completed)

Met with APEGBC and nation admissions officials group to review the status of project to date, April 8, 2016. Project to be extended to May 2017.

Review pilot results from other provinces and determine appropriate recommendations for Council's consideration by Q3 2017.

Strategy 6.3



Articulate, in coordination with the ARC, the expectations and requirements of accreditation

STATUS
PENDING



Completed 100.0%

Activity: 2

Last update: Jan 05, 2016

Roydon Fraser Paper: (100% Completed)

Briefing Note submitted to November 2015 PEO Council Meeting

Strategy 6.4



Analyze, in coordination with the ARC, the utility of the “looking to exempt” designation of Washington Accord Applicants

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Jan 05, 2016

ARC Review CEQB Recommendations: (100% Completed)

ARC Reviewed 2016 Draft CEQB Work plan which does not include any changes to the criteria

Attend Licensing Affairs Committee Meeting: (100% Completed)

Observed at all Engineers Canada convened Meetings with Admissions Officials on ECA

Implement ARC Recommendations: (100% Completed)

ARC Updated Policy Manual does not recommend any changes to Looking to Exempt criteria
Advise ARC of CEQB position and have ARC recommend changes, if any, by December 31, 2015

Strategy 6.5



Conduct a policy review of Canadian experience requirements, technical exam programs and national mobility

STATUS
PENDING



■ Completed 100.0%

Activity: 6

Last update: May 11, 2016

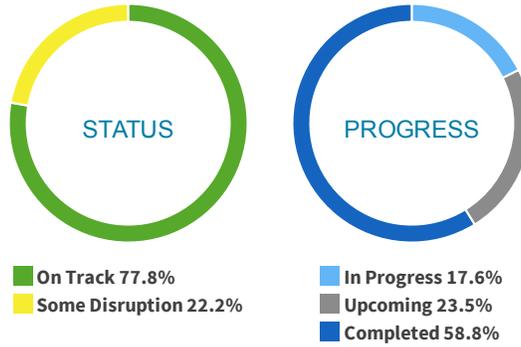
Implement Action Plan: (100% Completed)

Ontario Labour Mobility Act Exception Briefing Note presented at March 11, 2016 Council Meeting

Strategic Objective 7



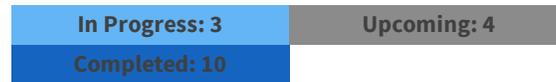
REGULATORY FRAMEWORK - The complaints process is optimized, balancing transparency, fairness and timeliness



Total Assignment: 4



Total Activity: 17



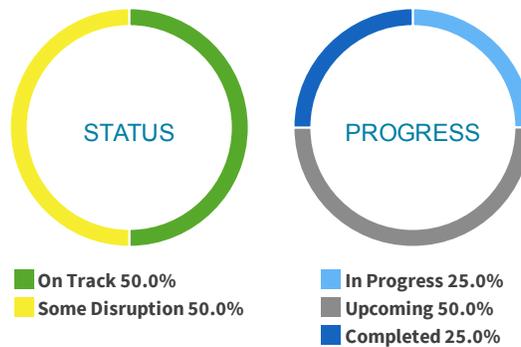
Strategy: 6

Activity: 17

Strategy 7.1



Develop system to monitor and report on discrete complaint investigation steps against their established targets.



Activity: 4

Last update: May 13, 2016

Discrete complaint investigation step targets have been established. Some disruption to initiation of work with IT due to current focus on Repeal project report. Overall strategy implementation not expected to be delayed at this point.

Strategy 7.2



Develop a system to monitor and report discrete complaint investigation steps against the established targets



Activity: 1

Last update: Feb 24, 2016

Targets have been set for discrete complaint investigation steps. Further activity on this strategy is now included in strategy 7.1.

Strategy 7.3



Develop revised publicly available Complaints Guide reflecting current complaint and investigation processes



Activity: 4

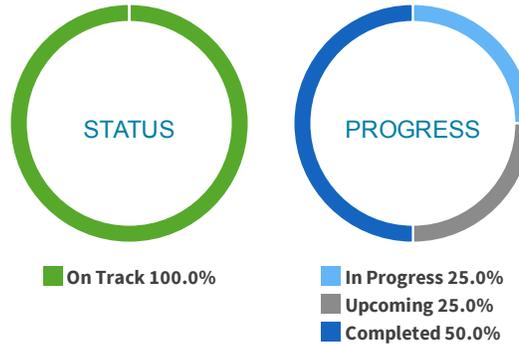
Last update: Feb 24, 2016

Revised Complaints Guide has been reviewed by Communications and is set for posting to website by end of Feb, 2016.

Strategy 7.4



Develop internal complaints procedures manual



Activity: 4

Last update: May 13, 2016

Procedure manual structure and table of contents have been developed and approved. Development of manual content is underway. Content currently under review by investigative staff, and on track for first draft in summer 2016.

Strategy 7.5



Implement new COC Decision and Reasons template for COC non-referral decisions



Activity: 2

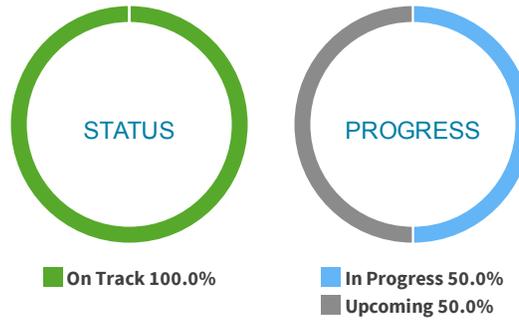
Last update: Jan 07, 2016

New COC Decision template is being used for COC non-referrals flowing from the December 2015 COC meeting.

Strategy 7.6



Review and refine voluntary undertakings process employed by Complaints Committee within complaints process.



Activity: 2

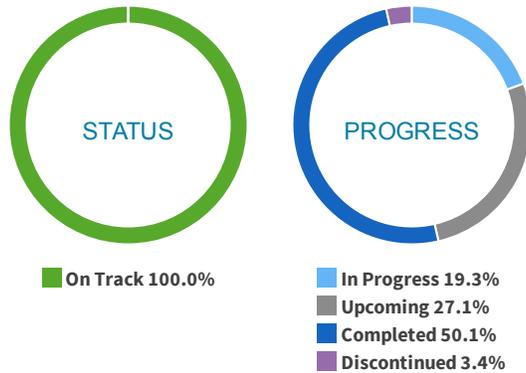
Last update: May 13, 2016

Legal opinion wrt Voluntary Undertakings process has been received and reviewed by staff. Currently scheduled to be reviewed by COC at its AGM in July.

Strategic Objective 8



REGULATORY FRAMEWORK - The practice and title-provisions of the Professional Engineers Act are judiciously enforced and continuously improved



Total Assignment: 14



Total Activity: 59

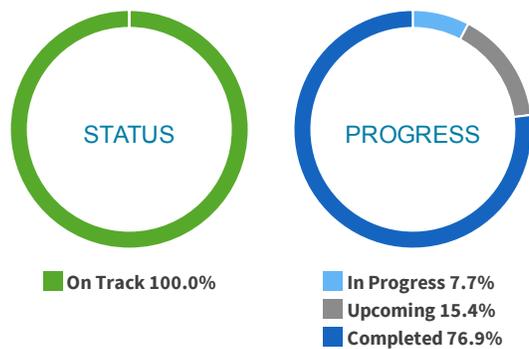


Strategy: 10 Activity: 59

Strategy 8.1



Categorize all enforcement inquiries by source of allegation and violation type



Activity: 6

Last update: May 13, 2016

Categorize: (100% Completed) Building on the tracking currently in place, additional categories for tracking enforcement inquiries and files have been created, and a more robust tracking system has been developed. The system is more labour intensive. Aptify

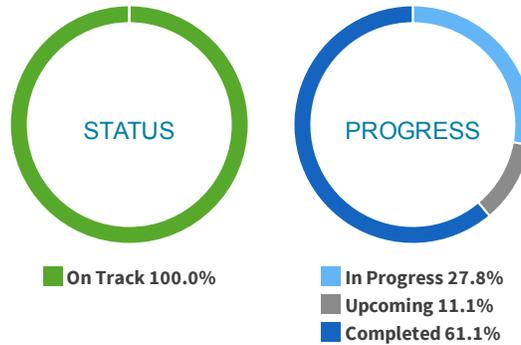
Phase II can help alleviate this additional workload, but in the meantime the tracking is being done using MS Excel. Review of 2015 data is in progress.

Communication strategies are in development concurrent with final analysis of 2015 data, compared with corresponding data for 2014 and 2013

Strategy 8.2



Develop key performance indicators (KPIs) of enforcement activity.



Activity: 7

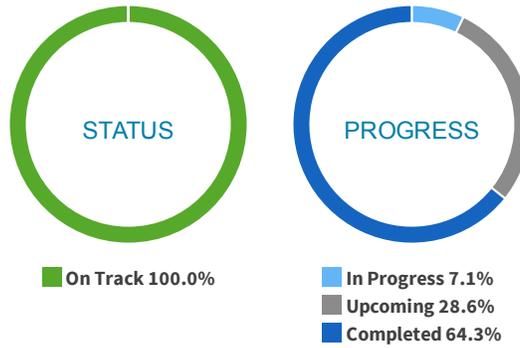
Last update: May 13, 2016

Tracking of internal operational indicators in now on-going.

Strategy 8.3



Develop new enforcement activity report



Activity: 6

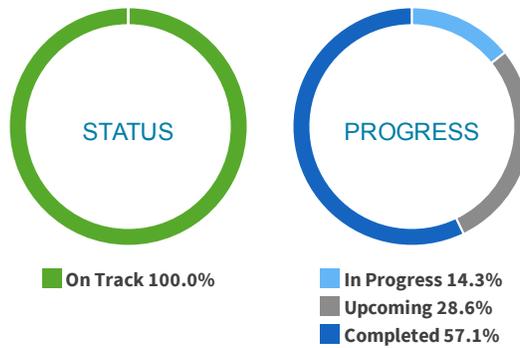
Last update: May 13, 2016

Enforcement activity report was revised with new measurements and included in the 2014 and 2015 PEO Annual Report. Additional feedback to be requested for incorporation into 2016 annual report.

Strategy 8.4



Revise enforcement policy and procedures manual



Activity: 5

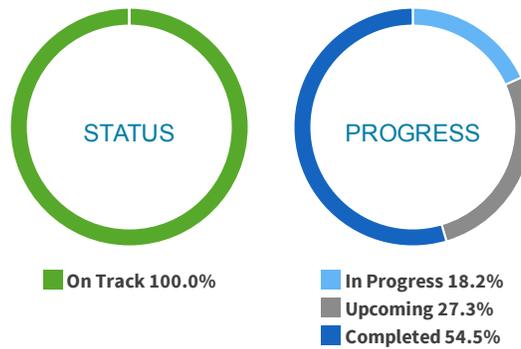
Last update: May 13, 2016

Gap analysis to evaluate current enforcement policies for gaps and relevancy has been completed. Draft policy document needs formal internal review and formatting, on-track for completion by end of 2016.

Strategy 8.5



Develop criteria to assess and prioritize enforcement violations and link them to associated degrees of prosecutorial action



Activity: 7

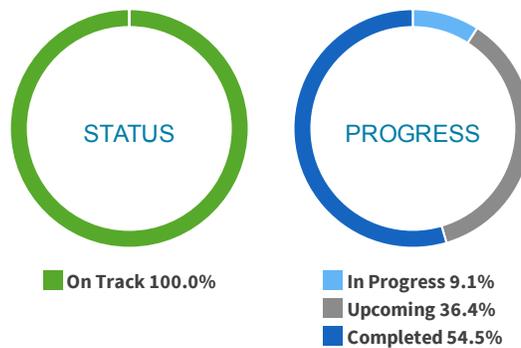
Last update: May 13, 2016

Structure for Decision Aid is mapped out. Concept being fleshed out with detail that defines public and operational risk.

Strategy 8.6



Carry out root cause analysis of obstacles to enforcement prosecutorial success



Activity: 8

Last update: May 13, 2016

Review of 2014 major files and obstacles is complete. Go-forward actions have been identified to address obstacles. Review of 2015 major files to be completed by Sept 2016.

Strategy 8.7



Communicate intent of 2014 changes to the Building Code Act to building officials and monitor compliance

STATUS
PENDING



■ Completed 75.0%
■ Discontinued 25.0%

Activity: 4

Last update: Feb 22, 2016

█ Strategy is completed.

Strategy 8.8



Develop Enforcement Reporting Guide for use by general public and members



■ On Track 100.0%



■ In Progress 20.0%
■ Upcoming 60.0%
■ Completed 20.0%

Activity: 5

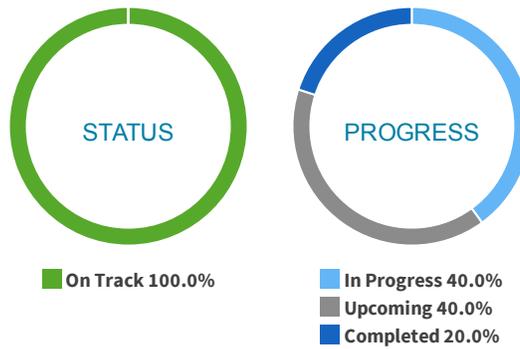
Last update: May 13, 2016

█ Feedback provided by Enforcement Committee. Revised draft has been prepared, currently under review.

Strategy 8.9



Develop plan for enhanced enforcement in manufacturing sector.



Activity: 5

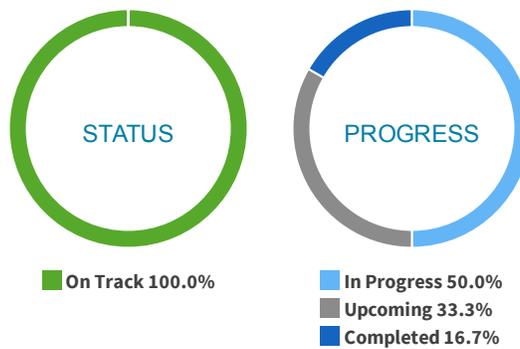
Last update: May 13, 2016

Assessment of effectiveness of current enforcement activities in manufacturing sector underway. 'Enhanced' enforcement activities to be identified in summer 2016.

Strategy 8.10



Develop plan for enforcement outreach to key stakeholders.



Activity: 6

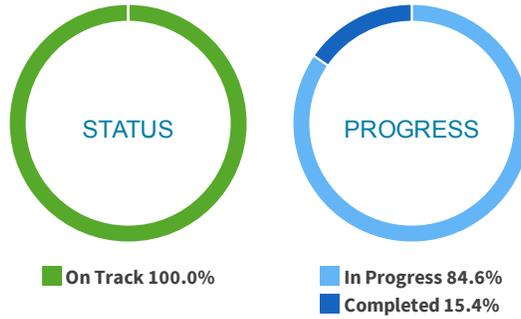
Last update: May 13, 2016

Current focus is on assessing effectiveness of past enforcement outreach activities, to assist in development of proactive, targeted outreach plan.

Strategic Objective 9



REGULATORY FRAMEWORK - Tribunals employ accepted smart practices in all operations and are seen to be independent and fair



Total Assignment: 7



Total Activity: 9



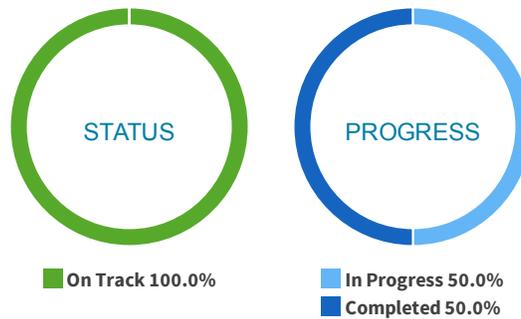
Strategy: 4

Activity: 9

Strategy 9.1



Establish and implement enhanced practices for all PEO Tribunals



Activity: 4

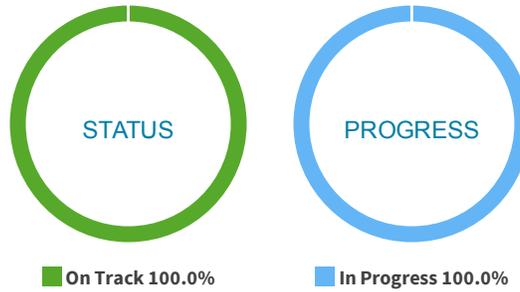
Last update: May 10, 2016

To complete this strategy the DIC and REC need to provide approval for staff to post the practice directions; for timelines for the release of decision and reasons, access to records and publication and cost awards. If approval is obtained, staff will post this practice direction on-line.

Strategy 9.2



Tribunal Panel Composition and Size



Activity: 1

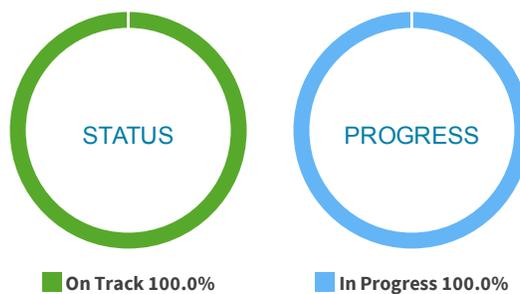
Last update: May 10, 2016

Research continues including historical and inter-jurisdictional scan. Anticipate completing this strategy by November .

Strategy 9.3



Modernization of tribunal processes on practice directions and webpage information.



Activity: 1

Last update: May 10, 2016

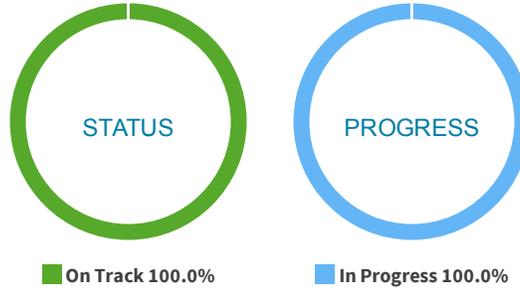
Reviewed current issues and lessons learned from requests from media and other stakeholders for access to records of proceedings. Identified areas that need legislative changes, and reported to Chairs. REC Chairs are of the view that no change required. DIC Chair

will propose temporary solutions to formalize processes for requests for access to records by June 2016.

Strategy 9.4



On-line webinar training programs for adjudicators.



Activity: 3

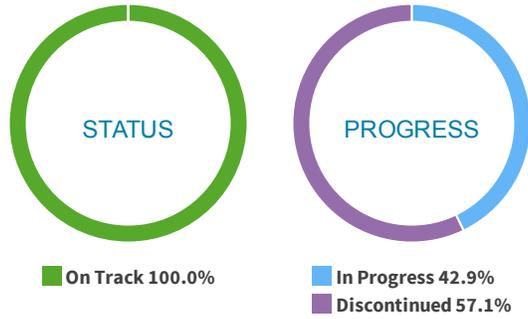
Last update: May 10, 2016

Content for webinars is available. Will schedule IT resources to complete this strategy by end of 2016.

Strategic Objective 10



STAKEHOLDERS - Engage key regulatory ministries and industry in engineering public policy development



Total Assignment: 1



Total Activity: 4



Strategy: 2

Activity: 4

Strategy 10.1



Work with various PEO units and external stakeholders to further the aim, expressed in Council position, of introducing professional design coordination into the Ontario Building Code

STATUS
PENDING



Activity: 3

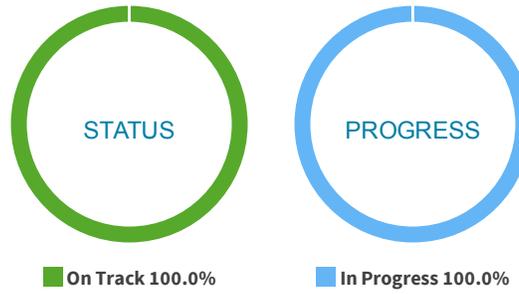
Last update: Feb 22, 2016

This item is already covered under Strategy 4.8.

Strategy 10.2



Pilot project on developing a performance standard to address MOECC modernization of approvals under the Environmental Protection Act.



Activity: 1

Last update: May 10, 2016

MOECC has replied to the PSC questions. Next steps will look to finalize the Terms of Reference and seek Council approval to proceed with developing the necessary standard. This strategy will not complete in .

Strategic Objective 11



STAKEHOLDERS - Other engineering bodies (eg. OSPE, OACETT, CEO, and Ontario universities, among others), are supported within the limits of their respective mandates

STATUS
PENDING



Completed 100.0%

Total Assignment:

Total Activity: 14

Completed: 14

Strategy: 5

Activity: 14

Strategy 11.1



Collaborate with other Ontario engineering bodies to provide information on licensing requirements

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Jan 05, 2016

Maintain ongoing relationships with OSPE wrt experience requirements: (100% Completed)

P. Lebel supported OSPE training session on experience requirements on December 5, 2015

Maintain ongoing relationships with OSPE wrt experience requirements: (100% Completed)

Ongoing Participation in Seminars

Provide support to PEO chapters: (100% Completed)

Ongoing Presentations to Chapters

Presentation to government and employers on experience requirements: (100% Completed)

Licensing Staff have attended IEP conference and continue to give presentations to employers

Presentation to government and employers on experience requirements: (100% Completed)

Participated in the City of Toronto's Engineering career fair on October 26, 2015

Panel Participations: (100% Completed)

Participated in IEP conference panel discussion for February 26, 2015

Presentations to government, employers, Chapters and IEG Panels completed in 2015

Strategy 11.2



Review National Engineering Month partnerships to enhance cooperation among main engineering bodies (PEO, OACETT, and OSPE)

STATUS
PENDING



Completed 100.0%

Activity: 3

Last update: Aug 24, 2015

Three CEOs met (PEO, OACETT and OSPE) early summer - the result is that the Memo of Understanding for 2016 will include OSPE as a full fledged founding partner. OSPE's portion of payment of founders fees is \$10,000 for the year of 2016 and will be payable before January 31, 2016. All other aspect of the MoU and the relationship will remain the same.

Matthew Ng, Manager, Chapters completed the MoU 2016 edits in the week of 10 August. All parties on the MoU either have or will be signing the document before it is send back to each member of the founding partner.

At the August 20 2015 NEMOSC meeting, the committee passed a terms of refernce document adding some element of governance to the existing NEMOSC meetings. The terms of reference document included committee mandate, roles and responsibilities, committee make up and most importantly the quorum.

The strategy is therefore completed.

Strategy 11.3



Explore with OSPE alternative funding arrangements for the OPEA Gala to promote the long-term viability and prestige of the event

STATUS
PENDING



Completed 100.0%

Activity: 2

Last update: Mar 02, 2015

OPEA Gala Funding (PD11): (100% Completed) 3-year OPEA Memorandum of Understanding for 2015 - 2017 signed by PEO and OSPE

OPEA Memorandum of Understanding (PD11): (100% Completed) Council approval of 3-year Memorandum of Understanding for 2015 - 2017 OPEA.

Strategy 11.4



Improve PEO lines of communication with CEAB, CEQB and universities

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Jan 05, 2016

CEAB Rep Attending CODE Meetings: (100% Completed)

CEAB Rep attended June CODE meeting and will continue to attend CODE meetings scheduled in Ontario in 2016

CEAB and CEQB Rep Council Reports: (100% Completed)

PEO's CEAB and CEQB Reps prepared and distributed Annual report to the November 2015 Council Meeting

Requirement for Annual Council Reporting by PEO's CEAB and CEQB Reps established in 2015

Strategy 11.5



Explore options, in consultation with CEAB and universities, for addressing effect of Limited Licence changes on university professors

STATUS
PENDING



Completed 100.0%

Activity: 1

Last update: Aug 27, 2015

ARC CODE Fact Finding : (100% Completed) at the June 29 ERC meeting the PEO/CODE guideline on the interpretation of experience requirements for university faculty was approved.

New Interpretive Guidelines have been completed and endorsed by CODE.

Strategic Objective 12



STAKEHOLDERS - Productive partnerships are developed with Engineers Canada and other constituent associations

STATUS
PENDING



Completed 100.0%

Total Assignment:

Total Activity: 3

Completed: 3

Strategy: 1

Activity: 3

Strategy 12.1



Contribute to Engineers Canada initiatives to address maximization of common standards and assess applicability of other CA practices in licensing, accreditation discipline and enforcement issues

STATUS
PENDING



Completed 100.0%

Activity: 3

Last update: Jan 05, 2016

Licensing Affairs Committee: (100% Completed)

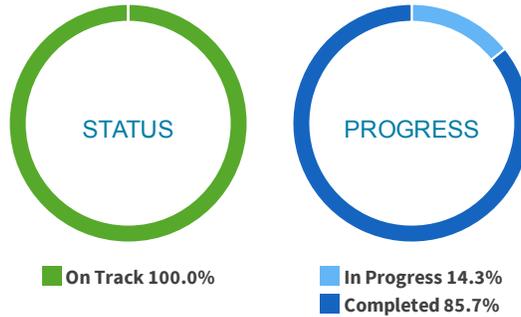
Observed at August and September NAOG consultation. Project is on hiatus.

Engineers Canada's Educational Assessment Project was monitored throughout 2015

Strategic Objective 13



STAKEHOLDERS - Public respect for the role of PEO is increased in accordance with the objects of the Professional Engineers Act



Total Assignment: 1

On Track: 1

Total Activity: 7

In Progress: 1

Completed: 6

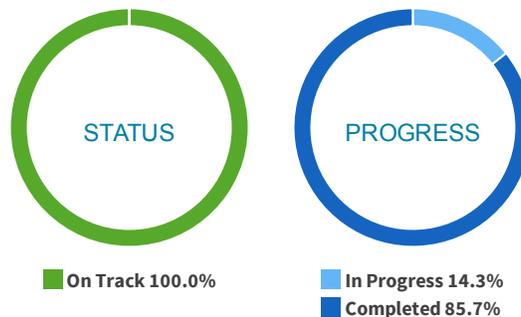
Strategy: 1

Activity: 7

Strategy 13.1



Audit PEO communications activities to determine their current effectiveness and make recommendations for increasing their effectiveness in support of the organization's Vision and Mission



Activity: 7

Last update: May 11, 2016

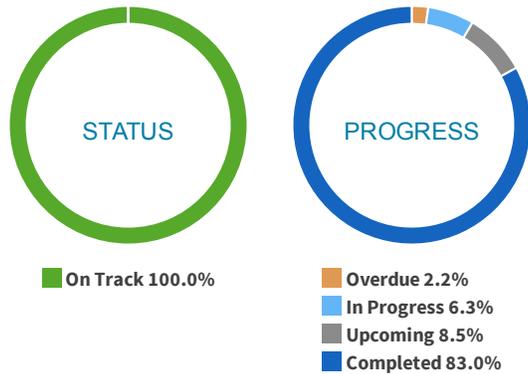
Implementation of audit recommendations continues. Latest activities: Revised PEO PowerPoint templates in wide use. Boilerplate "About PEO" text on media releases revised to include PEO mission and vision. PEO/OSPE joint brochure has been reviewed and 2nd revision is imminent. PEO external communications routinely go through Communications. Engineering Dimensions redesign

■ scheduled for year-end 2016. Strategy is expected to be fully implemented by December 2016.

Strategic Objective 14



OPERATIONS - Electronic communications are engaging, interactive, dynamic and appropriately targeted and integrated



Total Assignment: 3

On Track: 3

Total Activity: 30

Overdue: 1

In Progress: 2

Upcoming: 3

Completed: 24

Strategy: 4

Activity: 30

Summary

Strategy 14.1, aimed at implementing the next iteration of PEO's web presence, is on track. Website analytics analyzed. Log of current site functionality and issues created. Website survey fielded with almost 2600 responses. IT has budgeted in 2016 for platform switch to SharePoint. Improvements to current site based on feedback and analytics begun. Requirements gathering for RFP to begin soon. Next iteration of website is scheduled for implementation in Q4 2016/Q1 2017.

Strategy 14.2, aimed at developing a web-based Engineering Dimensions to enhance accessible for all members, is on track. Beta site tested by internal and volunteer testers and recommendations implemented. Engineering Dimensions microsite will be live with release of the May/June 2016 issue. Strategy expected to be fully executed by December 2016.

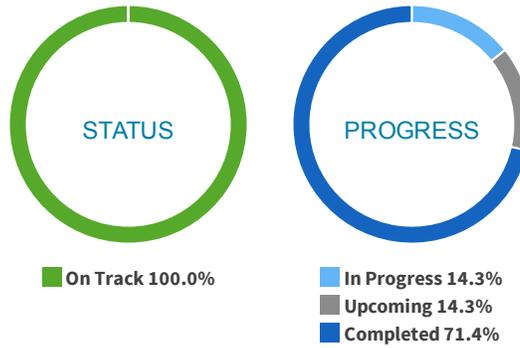
Strategy 14.3, aimed at fully integrating social media into PEO communications, is one track. Social media used extensively to promote PEO elections, AGM, Order of Honour. Order of Honour vignettes posted to PEO YouTube channel. Hashtags established for AGM and Order of Honour and used extensively by participants live tweeting the events. Seventeen chapters are using social media to communicate. Strategy expected to be fully executed by September 2016.

Work on Strategy 14.4, aimed at ensuring online information for applicants about courses in lieu is clear, has been completed.

Strategy 14.1



Review website analytics and end-user functionality to determine next iteration of PEO web presence



Activity: 7

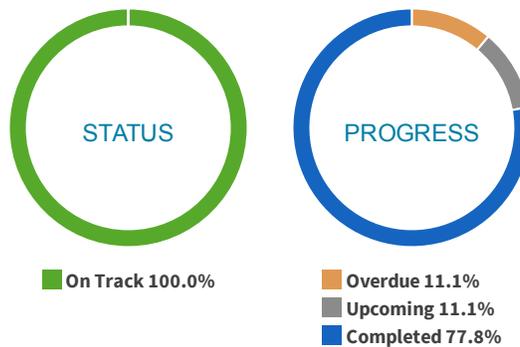
Last update: May 11, 2016

Analytics have been reviewed and log of current website functionality and issues created. Website survey fielded and almost 2600 responses received, which have been analyzed. Agreed with IT on change in platform to SharePoint. Money budgeted in IT 2016 capital budget for the new platform. Homepage banner navigation buttons implemented as an immediate improvement, based on survey responses. Website content is being revised and updated daily and functionality issues are being addressed with current website vendor. Development of RFP for new website scheduled for summer 2016. New website expected to be implemented in late 2016/early 2017 depending on IT priorities/workload.

Strategy 14.2



Develop web-based version of Engineering Dimensions to enhance accessibility of information for members



Activity: 9

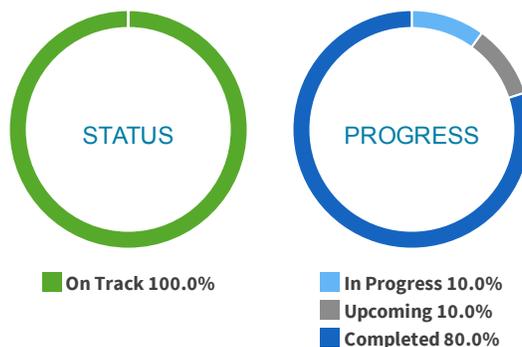
Last update: May 11, 2016

Feedback received from volunteer beta testers and incorporated. Site on track for launch with May/June 2016 issue, which includes a feature article on how to navigate site. Strategy expected to be fully executed by December 2016.

Strategy 14.3



Develop and cement social media as a PEO communications tool



Activity: 10

Last update: May 11, 2016

Social media used extensively to promote PEO annual meeting. Hashtags developed for PEO AGM and Order of Honour and used by various attendees live tweeting the meetings. Seventeen chapters are now using social media regularly in their communications. Other chapters will be encouraged to develop social media presence. Strategy expected to be fully implemented by September 2016.

Strategy 14.4



Clarify applicant information about courses in lieu and provide more detailed instructions for obtaining PEO approval on PEO's website



Activity: 4

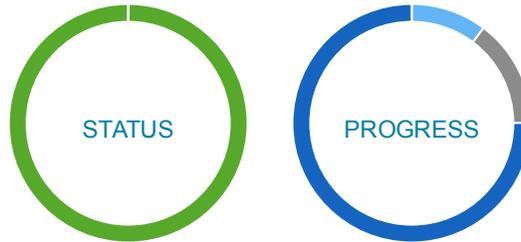
Last update: Aug 27, 2015

Information was made available to applicants on PEO's website together with other information regarding technical examinations.

Strategic Objective 15



OPERATIONS - Service delivery is improved by clarifying staff and volunteer responsibilities and managing performance



On Track 100.0%

In Progress 10.3%

Upcoming 14.7%

Completed 75.0%

Total Assignment: 4

On Track: 4

Total Activity: 39

In Progress: 4

Upcoming: 9

Completed: 26

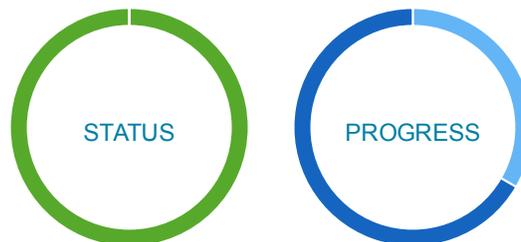
Strategy: 7

Activity: 39

Strategy 15.1



Align individual staff objectives to priorities and goals and provide coaching, support, training and empowerment to increase competencies and improve service delivery



On Track 100.0%

In Progress 33.3%

Completed 66.7%

Activity: 3

Last update: May 12, 2016

Strategy Update: SMT reviewing recommended strategies to increase staff competencies and improve service delivery.

Next Steps: Communicate approved coaching mechanisms with employees.

Project expected to be completed by: June 2016

Strategy 15.2



Explore utility of a new Chart of Accounts and Staff Contribution System to facilitate accurate and informative financial tracking

STATUS
PENDING



Completed 100.0%

Activity: 6

Last update: Jan 11, 2016

Completed

Strategy 15.3



Initiate Lean Management Project to review steps and processing times of the P. Eng. Licensing process

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Nov 11, 2015

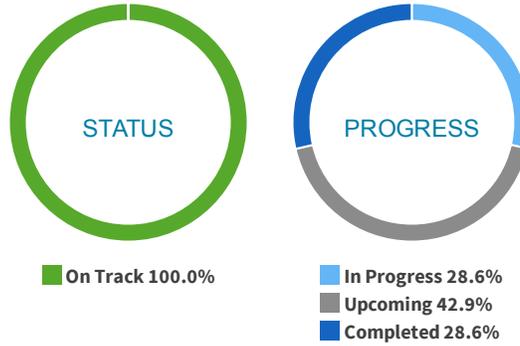
Develop Implementation Plan: (100% Completed)

Implementation plan has been developed

Strategy 15.4



Review applicant assessment communications to ensure clarity



Activity: 7

Last update: May 11, 2016

Clarify the letters and make them easy to read.: (65% Completed)

Letters reviewed by Licensing staff

Standard letters need to be clear and easy to understand. : (55% Completed)

All revised letters have been reviewed by Licensing and Crystal Versions provided by IT

Letters to be reviewed, modified and implemented by Q4 2016.

Strategy 15.5



Conduct a survey as a follow-up to applicants that have been interviewed by the ERC

STATUS
PENDING



Completed 100.0%

Activity: 5

Last update: May 11, 2016

Highlight recommendations for process improvement: (100% Completed)

The survey was completed and recommendations will be considered. Another survey will be conducted once the recommendations are in place.

The survey results were presented to February 2016 ERC Business Meeting.

Strategy 15.6



Establish Process Indicators for Temporary Licence, Limited Licence, Consulting Engineer Designation and Certificate of Authorization

STATUS
PENDING



Completed 100.0%

Activity: 4

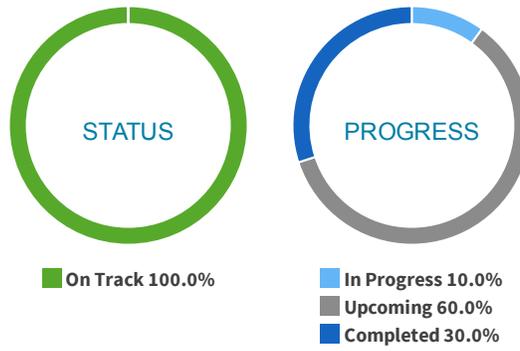
Last update: Nov 25, 2015

this item is complete as of Nov. 27, 2015

Strategy 15.7



Implementation of online expense project



Activity: 10

Strategic Objective 16



OPERATIONS - Cost management and service delivery are improved by actively managing service provider performance

STATUS
PENDING



■ Upcoming 18.2%
■ Completed 81.8%

Total Assignment:

Total Activity: 11



Strategy: 1

Activity: 11

Strategy 16.1



Manage vendor performance, reduce or consolidate vendors where possible and consider going to RFP / RFQ if appropriate to maximize the value provided by PEO's 3rd party suppliers

STATUS
PENDING



■ Upcoming 18.2%
■ Completed 81.8%

Activity: 11

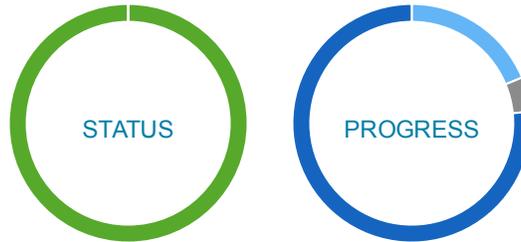
Last update: May 13, 2016

Monthly meetings with vendors that provide major/essential services have been setup and are ongoing. Next steps are to create a vendor performance report to be updated monthly

Strategic Objective 17



OPERATIONS - PEO Headquarters occupancy rates and building efficiency are optimized



■ On Track 100.0%

■ In Progress 18.8%

■ Upcoming 4.7%

■ Completed 76.6%

Total Assignment: 1

■ On Track: 1

Total Activity: 24

■ In Progress: 1

■ Upcoming: 1

■ Completed: 22

Strategy: 5

Activity: 24

Strategy 17.1



Assess furniture assets in long-term storage for disposal to optimize storage requirements and minimize storage costs

STATUS
PENDING



■ Completed 100.0%

Activity: 5

Last update: Mar 03, 2015

Long-term Asset Storage Requirements: (100% Completed) Assets have been documented and a full inventory has been prepared

Assess Asset Inventory: (100% Completed) Finance has identified which assets have any book value and those that still do.

Determine Disposal Options: (100% Completed) Several furniture dealers contacted and none were interested in purchasing items with no book value.

Prepare Disposal Plan : (100% Completed) Disposal and storage plan approved by Registrar

Disposal and Storage: (100% Completed) All assets have been disposed of or are now in storage at 40 Sheppard. PEO will no longer incur any storage fees going forward.

Strategy 17.2



Renovate suite 101 to enhance working conditions of front-line reception staff, provide greater privacy to applicants and increase meeting space for volunteers

STATUS
PENDING



Completed 100.0%

Activity: 9

Last update: Oct 08, 2015

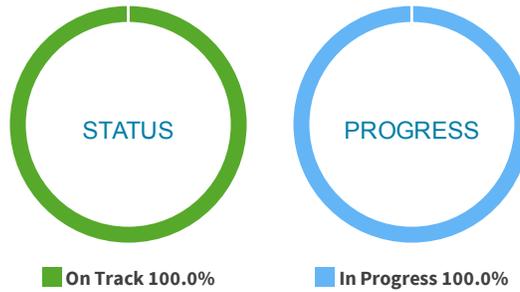
Project Completion: (100% Completed)

Close out and as built drawing have been received.

Strategy 17.3



Create a 40 Sheppard capital projects document archive to improve research and analysis capabilities and enhance decision-making



Activity: 1

Last update: May 11, 2016

Strategy Update: Archiving of building documents ongoing.
 Next steps: documents will be archived and tagged to be searchable
 Project is expected to be completed by April 2017

Strategy 17.4 ★★☆☆

Update the long-term capital plan for 40 Sheppard to ensure appropriate stewardship of PEO's building asset and improve financial planning



Activity: 5

Last update: Apr 20, 2016

Status Update: This project is now complete.

Strategy 17.5



Upgrade hydraulic parking garage elevator

STATUS
PENDING



■ Upcoming 25.0%
■ Completed 75.0%

Activity: 4

Last update: May 10, 2016

Strategy Update: Materials and equipment have been ordered.

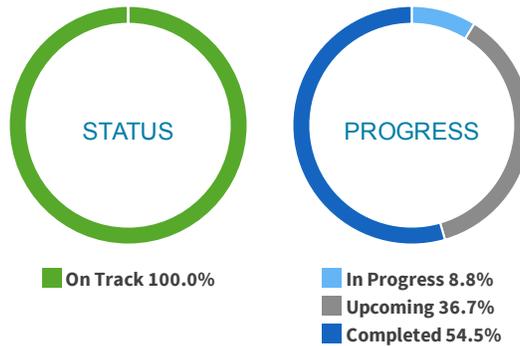
Next Steps: Construction is to begin the first week of July 2016.

Project expected to be completed by August 31, 2016.

Strategic Objective 18



OPERATIONS - Risk is mitigated by assessing vulnerabilities and addressing service gaps



Total Assignment: 4

On Track: 4

Total Activity: 55

In Progress: 4

Upcoming: 15

Completed: 36

Strategy: 11

Activity: 55

Strategy 18.1



Outsource eblasts and migrate all Chapters off Prism 4.3

STATUS
PENDING



Activity: 7

Last update: Aug 26, 2015

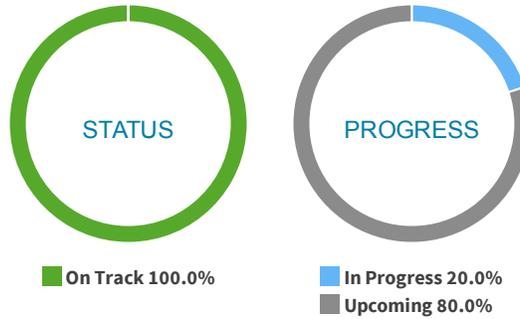
- email campaigns (eBlasts) successfully outsourced to "Campaigner"
- the Communications team and all Chapters are now using this new tool

- project is closed

Strategy 18.2



Re-launch Sharepoint based upon accepted smart practices



Activity: 5

Last update: Feb 19, 2016

This project will launch April 2016.

Strategy 18.3



Replace the outsourced core infrastructure provider



Activity: 5

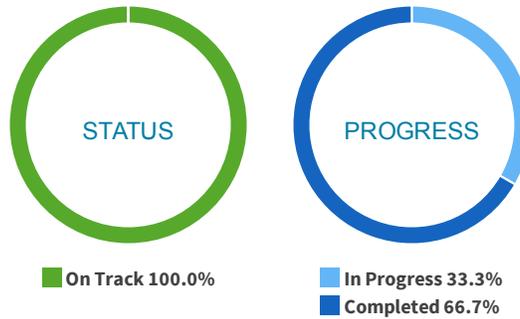
Last update: Oct 20, 2015

Infrastructure move is complete and we are live at CentriLogic

Strategy 18.4



Update systems – PCs; website performance; Optical Imaging Technology



Activity: 3

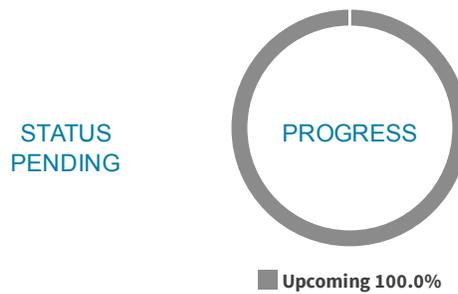
Last update: Aug 26, 2015

- The update of the Optical Imaging Technology (OIT) software is progressing towards completion by September 30, 2015
- The project to update Microsoft Office is planned to be initiated after the OIT project is completed

Strategy 18.5



Implement new Online Licensing system



Activity: 5

Last update: May 11, 2016

To be implemented in conjunction with Aptify Phase 2. Expected to be completed in 2017

Strategy 18.6



Implement an IT dashboard to focus efforts on improving service availability, service performance, and client satisfaction

STATUS
PENDING



Upcoming 50.0%
Completed 50.0%

Activity: 2

Last update: Aug 26, 2015

- to be initiated in 2016 to allow resources to focus on project Aptify

Strategy 18.7



Develop a disaster recovery / business continuity plan to mitigate risk of disruption to ongoing PEO operations

STATUS



On Track 100.0%

PROGRESS



In Progress 20.0%
Upcoming 40.0%
Completed 40.0%

Activity: 5

Last update: May 09, 2016

Status Update: IT disaster recovery achieved as a result of switching to the new hosting provider. Development of enterprise wide

disaster recovery / business continuity plan initiated.

Next Steps: an enterprise wide disaster recovery / business continuity plan will be developed

Project is expected to be completed by December 2017.

Strategy 18.8



Develop a guide to CASL for Chapters to facilitate common understanding, compliance and mitigate risk

STATUS
PENDING



Completed 100.0%

Activity: 8

Last update: Dec 11, 2015

This strategy is complete

Strategy 18.9



Impliment APTIFY Phase 1

STATUS
PENDING



Completed 100.0%

Activity: 10

Last update: Feb 26, 2016

User Acceptance Testing: (90% Completed)

User acceptance testing taking a little longer than anticipated due to delay in receiving program elements

Mock Go-Live: (13% Completed)

Data conversion commenced

Go live still scheduled for March 21st

Strategy 18.10



Aptify - Phase 2

STATUS
PENDING



■ Completed 100.0%

Activity: 1

Last update: Feb 17, 2016

Strategy Update: Possible projects identified and prioritized by SMT and budget approved by Council. Projects assigned to Regulatory Compliance and IT. This project is now completed.

Strategy 18.11



Develop CASL Compliance Tracking



■ On Track 100.0%



■ In Progress 25.0%
■ Upcoming 75.0%

Activity: 4

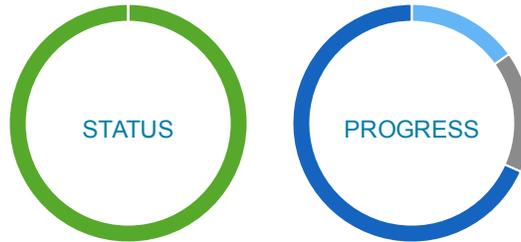
Last update: Feb 18, 2016

■ This project will launch April 2016.

Strategic Objective 19



STAFF, VOLUNTEERS & COUNCIL - PEO has a sustainable organization-wide continuous-improvement culture



On Track 100.0%

In Progress 15.2%

Upcoming 16.5%

Completed 68.3%

Total Assignment: 7

On Track: 7

Total Activity: 48

In Progress: 7

Upcoming: 7

Completed: 34

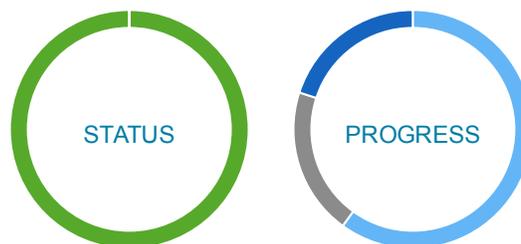
Strategy: 11

Activity: 48

Strategy 19.1



Establish IT Service Management controls and IT Project Management controls to increase predictability create efficiency and meet stakeholder needs



On Track 100.0%

In Progress 60.0%

Upcoming 20.0%

Completed 20.0%

Activity: 5

Last update: Aug 26, 2015

- engaged vendor (Info-Tech) to provide assessment of PM practices and to provide constructive feedback
- project planned for initiation in October, 2015

Strategy 19.2



Develop GLP training modules to enhance the skills of the GLP members and effectiveness of the GLP

STATUS
PENDING



■ Upcoming 20.0%
■ Completed 80.0%

Activity: 5

Last update: May 11, 2016

█ Status Update: communication plan developed, launch of training module on hold pending GLP audit review.

Strategy 19.3



Develop a Reference / FAQ Guideline module to improve access to information and enhance the learning opportunity for Chapter volunteers

STATUS
PENDING



■ Completed 100.0%

Activity: 5

Last update: Dec 11, 2015

█ The strategy is complete

Strategy 19.4



Develop Chapter financial management training module for Chapter Chairs and Treasurers to broaden understanding of fiscal processes and enhance accountability

STATUS
PENDING



Completed 100.0%

Activity: 5

Last update: Dec 15, 2015

This strategy is complete

Strategy 19.5



Update Employee Manual to ensure that PEO policies are in compliance with legislation and industry accepted smart practices; and post on SharePoint to enhance access to current information for all staff and facilitate common understanding and compliance

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Dec 17, 2015

This project is completed.

Strategy 19.6



Harmonize generic volunteer orientation with committee-specific on-boarding to improve volunteer understanding of PEO policies and volunteer engagement

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Dec 18, 2015

This project is completed.

Strategy 19.7



Develop Volunteer Manual to improve volunteer understanding of PEO policies and enhance access to current information



On Track 100.0%



In Progress 25.0%
Completed 75.0%

Activity: 4

Last update: May 12, 2016

Strategy Update: Final version of Volunteer Manual being reviewed in preparation for posting.

Next Steps: PDF volunteer manual is posted and communicated to all volunteers.

Project expected to be completed by: May 2016

Strategy 19.8



Provide Privacy Policy training to volunteers and staff to facilitate common understanding and compliance

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Aug 26, 2015

Production of the privacy policy training web module by ScholarLab ongoing.

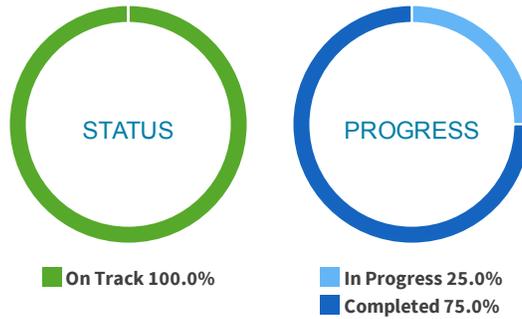
Next steps: Review draft module and finalize with ScholarLab

Project expected to be completed by: October 2015

Strategy 19.9



Conduct a member survey to assess relevance of PEO to their needs



Activity: 4

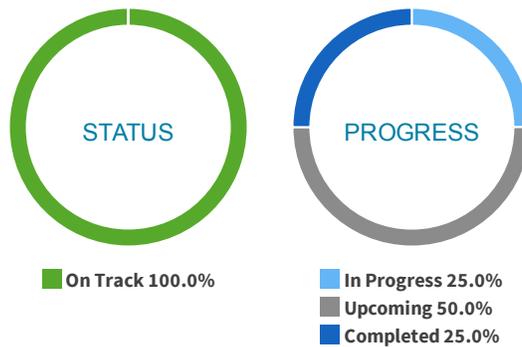
Last update: May 11, 2016

Strategy Update: Member Survey administered January 5 to February 5, 2016.
 Next Steps: Results being compiled for report to Council.
 Project expected to be completed by: May 2016

Strategy 19.10



Conduct GLP Review



Activity: 4

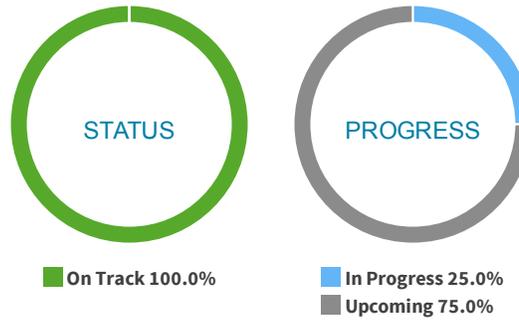
Last update: May 11, 2016

Status Update: RFP being conducted
 Next steps: auditor will be selected
 This project is expected to be completed by: Sept 2016

Strategy 19.11



Implement leadership development and volunteer on-boarding modules



Activity: 4

Last update: May 11, 2016

Status Update: Two module topics to be identified; several suggestions have been proposed.

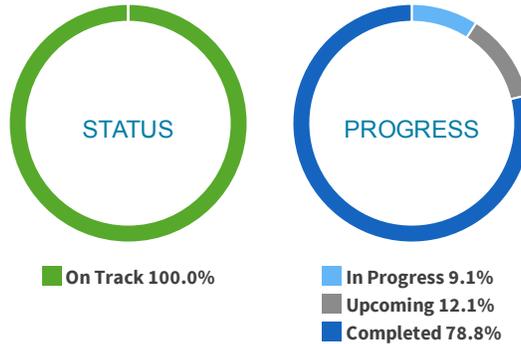
Next Steps: Module content to be developed by July 2016

Project expected to be completed by December 2016

Strategic Objective 20



STAFF, VOLUNTEERS & COUNCIL - PEO's governance approach is robust, transparent and trusted



Total Assignment: 4

On Track: 4

Total Activity: 36

In Progress: 4

Upcoming: 4

Completed: 28

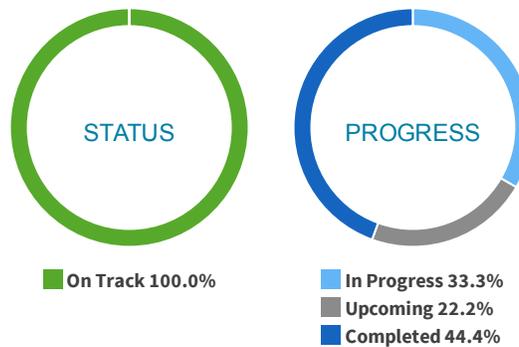
Strategy: 7

Activity: 36

Strategy 20.1



Develop and publish series of articles on aspects of PEO governance and accepted smart practices for governance of regulatory bodies



Activity: 9

Last update: May 11, 2016

Final article in first series published in May/June 2016 issue of Engineering Dimensions. Second series of articles being developed. Strategy is expected to be completed by December 2017.

Strategy 20.2



Review election costs and procedures of other Constituent Associations and develop a proposal for PEO elections that enhances efficiencies and controls costs

STATUS
PENDING



■ Completed 100.0%

Activity: 8

Last update: Aug 27, 2015

An RFP for the Official Elections Agent was completed and sent to six companies. Four submitted proposals. The submissions were reviewed and a recommendation for the Official Elections Agent is going to the September 25 Council meeting.

Next steps: Official Election Agent at the September 25 Council meeting and successful bidder notified.

Project is expected to be completed by September 30, 2015.

Strategy 20.3



Develop a Councillor orientation program to improve new Councillor on-boarding

STATUS
PENDING



■ Completed 100.0%

Activity: 3

Last update: May 26, 2015

Council Orientation: (100% Completed)

Presentation slides prepared.

Council Orientation : (100% Completed)Orientation delivered May 28, 2015.

Project completed.

Strategy 20.4



Develop a briefing note training program for staff and volunteers to improve the quality of submissions to Council and to enhance decision-making at Council

STATUS
PENDING



Completed 100.0%

Activity: 6

Last update: Nov 09, 2015

Training module made available to Councillors, SMT, Committee Chairs and Committee Advisors.

Project completed.

Strategy 20.5



Develop and implement an electronic queuing and voting application for Council meetings to enhance the effectiveness of the Council Chair and improve meeting efficiency

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: May 11, 2016

This project has been terminated due to lack of viable applications and is therefore completed.

Strategy 20.6



Develop Council / Executive Committee motion tracking system to improve research capabilities and enhance Council oversight

STATUS
PENDING



Completed 100.0%

Activity: 3

Last update: Mar 04, 2015

Develop and populate Council/Executive Committee Motion Tracking System: (100% Completed) Tracking System Developed

SMT reviews the Council/Executive Committee motion tracking application: (100% Completed) Motion tracking system approved by SMT

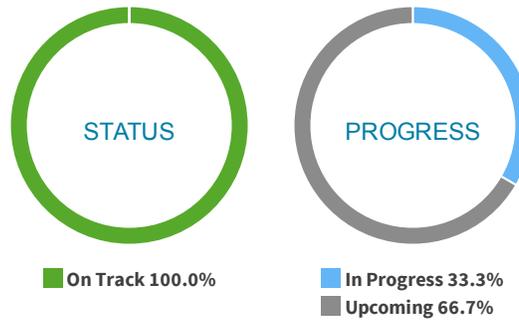
Council motion tracking: (100% Completed) Council Action Log posted to secure Council website

Project completed.

Strategy 20.7



Support Council Term Limits Task Force



Activity: 3

Last update: May 09, 2016

Strategy Update: Task Force continues to meet and review research.

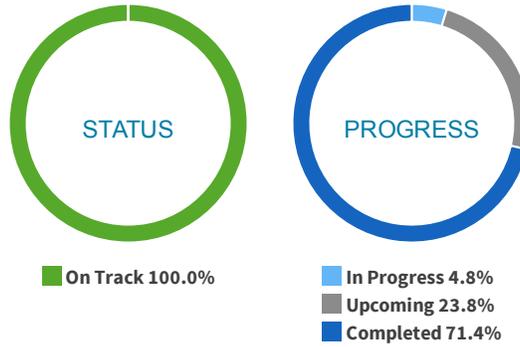
Next Steps: Task Force will draft report.

Project is expected to be completed by March 2017.

Strategic Objective 21



STAFF, VOLUNTEERS & COUNCIL - Chapters are engaged in the regulatory mandate of PEO



Total Assignment: 1

On Track: 1

Total Activity: 17

In Progress: 1

Upcoming: 5

Completed: 11

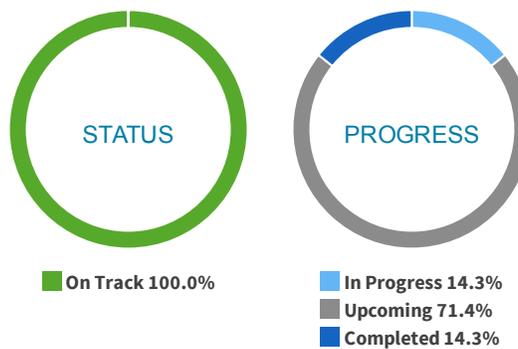
Strategy: 3

Activity: 17

Strategy 21.1



Develop a Licensure Assistance Program (LAP) orientation training module to improve access and enhance the learning opportunity for Interns and Guides



Activity: 7

Last update: May 09, 2016

Strategy update: LAP training requirements as well as a PowerPoint outline and structure have been developed.

Next steps: Training tools are currently being identified in the Guide and Intern handbooks. PowerPoint being developed.

Project is expected to be completed by July 31, 2017.

Strategy 21.2



Constitute a Chapter IT Governance Task Group to develop Chapter IT standards and recommended practices and enhance communication between Chapters and PEO on Chapter IT issues

STATUS
PENDING



Completed 100.0%

Activity: 6

Last update: Dec 15, 2015

The strategy is complete

Strategy 21.3



Plan and implement combined Volunteer Leadership Conference involving leaders from chapters and committees / task forces to be held in conjunction with the PEO Annual General Meeting to facilitate common understanding of regulatory issues among all volunteers

STATUS
PENDING



Completed 100.0%

Activity: 4

Last update: Aug 26, 2015

█ Project completed. Executive Committee approved ongoing continuation of Volunteer Leadership Conferences on August 11, 2015.

Strategic Objective 22



STAFF, VOLUNTEERS & COUNCIL - Equity and diversity values and principles are integrated into the general policy and business operations

STATUS
PENDING



■ Upcoming 37.5%
■ Completed 62.5%

Total Assignment:

Total Activity: 8



Strategy: 1 Activity: 8

Strategy 22.1



Online equity and diversity training module is available to all ARC and ERC members. Introduce mandatory equity and diversity and AODA training for all ARC and ERC members

STATUS
PENDING



■ Upcoming 37.5%
■ Completed 62.5%

Activity: 8

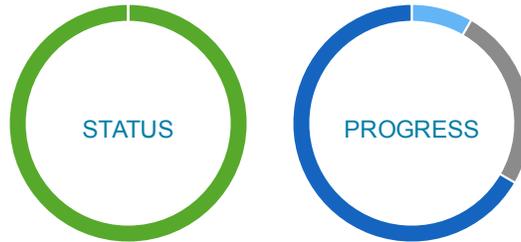
Last update: May 11, 2016

█ All new ARC and ERC members are required to complete the equity and diversity training before they are able to conduct interviews

Strategic Objective 23



STAFF, VOLUNTEERS & COUNCIL - Organizational renewal is ensured through succession plans and talent management strategies



On Track 100.0%

In Progress 8.3%
Upcoming 25.0%
Completed 66.7%

Total Assignment: 1

On Track: 1

Total Activity: 8

In Progress: 1

Upcoming: 2

Completed: 5

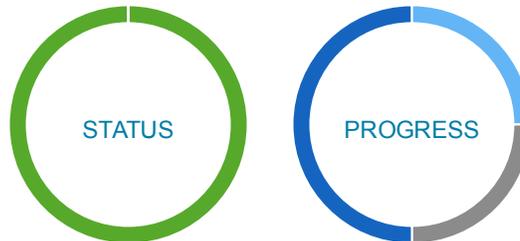
Strategy: 2

Activity: 8

Strategy 23.1



Conduct analysis of volunteer database to identify committee HR plan gaps and turn-over rate.



On Track 100.0%

In Progress 25.0%
Upcoming 25.0%
Completed 50.0%

Activity: 4

Last update: May 12, 2016

Strategy Update: Gap analysis summary report reviewed by ACV and SMT

Next Steps: Recommendations being developed for presentation to Council.

Project expected to be completed by: December 2016

Strategy 23.2



Develop succession plans and talent management strategies to enhance operational effectiveness

STATUS
PENDING



■ Upcoming 25.0%
■ Completed 75.0%

Activity: 4

Last update: May 12, 2016

Strategy Update: Succession plan strategies presented to SMT.

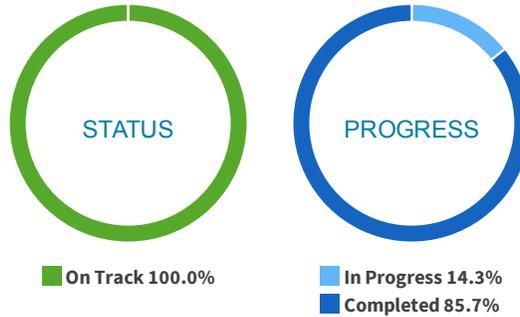
Next Steps: Implement and communicate approved strategies.

Project expected to be completed by: December 2016

Strategic Objective 24



STAFF, VOLUNTEERS & COUNCIL - PEO is recognized as an employer of choice



Total Assignment: 1

On Track: 1

Total Activity: 8

In Progress: 1

Completed: 7

Strategy: 2

Activity: 8

Strategy 24.1



Conduct an employee job satisfaction survey to assess and improve employee engagement and morale

STATUS
PENDING



Activity: 4

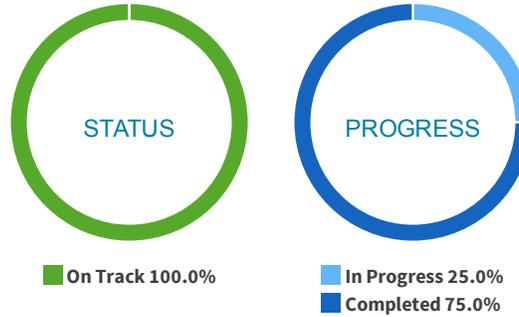
Last update: Feb 16, 2016

This project is now complete

Strategy 24.2



Develop an employer-of-choice strategy to increase employee engagement; enhance preservation of the knowledge base; promote employee satisfaction; and improve organizational performance



Activity: 4

Last update: May 12, 2016

Strategy Update: Research completed and employer of choice strategies under review by SMT.

Next Steps: Implement approved strategies

Project expected to be completed by: September 2016

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