

Professional Engineers Ontario

Government Liaison Program Audit Report

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Executive Summary:

An audit of the PEO Government Liaison Program (GLP) was undertaken to determine whether the program is operating as designed and whether it is achieving the expected results.

The audit approach adapted to PEO requirements combined audit, evaluation and program review techniques and covered the scope of work specified by PEO in the RFP issued May 13, 2016. It involved the review of a range of documentation pertaining to the program including Council and Executive Committee minutes, terms of reference, manuals, GLP Weekly Newsletters, work plans, budgets and reports. Over 70 interviews were conducted with Councillors, GLC members, Chapter GLP Chairs, MPPs, senior PEO staff, OSPE staff and the communications consultant. The primary focus of the study was on the results achieved with MPPs.

Findings were compiled and analysed to provide an overall assessment of the program and to identify recommendations for improvement. Findings indicated that the program has had a very positive effect, good relationships have been established with a number of MPPs and significant results have been achieved in raising awareness with MPPs, although it is likely that not all MPPs have been reached. From the sample of MPPs interviewed, PEO's self-regulating mandate is not well understood and support for or influence by PEO on government decisions still requires more work.

Results expectations as expressed by Councillors, GLC members and Chapter GLP Chairs generally reflected three themes – awareness/ relationships with MPPs, achieving understanding by MPPs and gaining support/ having influence with MPPs. These are consistent with the stated expectation: “Ultimately, the goal is to have government view PEO as a partner, and understand and support PEO's policy direction.” However, the emphasis placed on each theme and the language used by each group interviewed was often quite different and suggests that there is an opportunity for more clarity and recognition that awareness and a sound relationship are prerequisites for support and influence.

In assessing whether the program was operating as intended, a wide disparity was found among Chapters and in the perception of Council and GLC members. These differing perceptions suggest that consistent information on the status of the program is not adequately communicated. Almost all of the Chapter GLP Chairs interviewed indicated that they had been involved in at least one GLP event and had plans for organizing events or activities for the year. However, some had not seen the Chapter GLP Manual, reporting to HQ is limited and none seemed to be using the recruitment criteria specified in the manual. Current training for Chapter participants is done primarily through a one day Academy (normally 4 per year in different regions) and participants generally find these useful, but coverage seems to be incomplete. Recommendations are made to update the program design as specified in the manual and then take steps to implement it.

The study has identified many opportunities for improvement which will lead to better alignment of results expectations, a more strategic, focused approach and stronger Chapter participation. It is hoped that the specific recommendations will help enhance the delivery and eventual results achieved by the Government Liaison Program.

Summary of Recommendations:

Achieving GLP Objectives:

1. Assuming the original objectives of the program are still valid, more work is required to clearly and consistently communicate the role and mandate of PEO.
2. A strategy should be developed to target certain Ministers and MPPs who are considered a high priority for understanding PEO's role. The strategy should also seek to reach all MPPs and achieve a level of awareness with all MPPs.
3. GLC should continue to monitor all proposed legislation or changes to legislation in order to detect any potential incursions on the self-regulating role of PEO.
4. Expected results for the program, both short term and long term, should be clarified and clearly communicated so that Councillors and GLC members have the same understanding.
5. Expected results for the GLC, both short term and long term, should be clarified and clearly communicated so that Councillors and GLC members have the same understanding. This would include confirming GLC oversight and direction responsibilities, decision making/ advisory authorities and a clear message to be communicated. This may require an update of the GLC Terms of Reference to include any appropriate changes.

Reporting:

6. GLC should work with Council and Chapter GLP Chairs to determine reporting requirements for Council and the GLC and establish systems and procedures to meet these requirements. To the extent possible, the requirements, systems and procedures should build on information already collected or needed by the Chapter GLP Committees and should consider the limited volunteer time for reporting activities. Automated reporting tools should be employed wherever feasible.
7. Council should consider establishing a regular agenda item for GLC reporting and direction.

Training:

8. Objectives, target audience and expected results for training sessions should be clear. This should include clear, consistent messages that are to be communicated or reinforced through training.
9. Build on current training material and resources to expand training to meet the needs of different GLP participants.
10. Tailor some training/orientation to newly appointed Chapter GLP Chairs. Several new chairs mentioned that they would have appreciated training shortly after their election rather than months later. This training could be more specific to the needs of a new Chair and would help them get off to a good start.
11. Offer several training options in addition to Academies. These could include web based training (already developed but not yet implemented), video or teleconferences. Web based tools could provide on demand training and a library of special topics. This would recognize time/ travel constraints for many volunteers.
12. Participation in training events should be encouraged and reported. All chapters should participate for coverage and consistency. Follow up should be done with Chapters not participating.

13. Consider adding more content dealing with best practice Chapter activities.

GLP Weekly Newsletter:

14. GLC and Council should confirm the role of the GLP Weekly and its primary audience in the context of an overall strategy for the Government Liaison Program, the communication strategy for PEO and its relationship with Engineering Dimensions, GLP Information Notes and other communication products. Based on current usage of the newsletter, the role could include planning, reporting/ communicating, sharing ideas or providing recognition. The audience could range from Chapter GLP Chairs, Chapter Executives, GLC and Council to all PEO members to MPPs, their staff and senior public servants.
15. A more efficient option for planning should be considered in order to eliminate the repetition of upcoming events in the newsletter and to provide more guidance on priorities for attendance at events. An on line calendar of events with colour or some other coding to highlight the most significant events could be maintained and populated with key events well in advance.
16. GLC, with Council endorsement, should confirm the main message or messages it wants to convey to its primary audience.
17. When reporting on events involving MPPs or other officials, comments on results, reactions or follow up should be included wherever possible. This could be included in guidelines for volunteers or staff reporting on events.
18. To facilitate follow up on results or outcomes of events or meetings, the initial event reported could be flagged for follow up (eg. a meeting or conference dealing with an important issue).
19. To provide more depth/ substance, perhaps one article per issue should develop a priority theme or message. For example, interviews with Chapter GLP Chairs in early 2012 provided more depth.
20. Establish a searchable data base or search tool that would facilitate searches by topic, Chapter or individual. This would facilitate easy extraction of items on a particular issue or events attended by a particular MPP.
21. Costs and delivery methods should be compared to similar newsletters for other organizations. This was beyond the scope of the current study.

Activities/ Events:

22. Build on the success of the suite of events that are being used now , with minor adjustments if the rules for fund raising events change . Recognize the differences among Chapters and MPPs and that successful face to face meetings to discuss issues will only happen once a good relationship has been established. Ensure that when face to face meetings are planned, the right people attend, that expectations and approach are clear and that all PEO/ OSPE participants have the same briefing and agenda. Any required follow up for meetings or events should be documented and acted upon quickly.
23. All Chapters should be encouraged to complete at least one activity or event with each MPP in their area each year. Follow up should be done to monitor whether this is happening and to provide assistance as necessary.

Chapter GLP Support and Communication:

24. Emphasis should be placed on recruiting more of the right people to volunteer for the Chapter GLP Committees.
25. The GLP Chapter manual should be updated if any significant changes are made to the program. Distribution to all Chapter GLP Chairs should be timely and verified.
26. Measures to increase quarterly conference call participation should be examined including taping and distribution of copies of the calls.
27. GLC minutes or extracts from the minutes should be distributed to Chapter GLP Chairs.

MPP Suggestions:

28. In setting GLP priorities and designing activities, GLC and Chapter GLP Chairs should consider the benefits MPPs perceive in the relationship with PEO such as access to knowledge and advice on issues. They should also consider the specific suggestions for activities such as seminars on important topics, site tours, encouraging youth and doing more on diversity.
29. Some suggestions made by MPPs may apply more to OSPE (e.g. position papers on issues on the government agenda) and these suggestions should be raised with OSPE and coordinated action taken to best utilize these position papers.
30. Follow up should be done with the professional organizations suggested to determine if they have any best practice that PEO could implement.

Implementation

31. Council should request that the GLC develop a plan that would set out priorities, activities, responsibilities, timeframes and resource requirements to implement the re commendations accepted in principle by Council. The plan should be developed in consultation with Chapter GLP Chairs and other stakeholders.
32. Council should allocate a budget of \$15,000 for additional resources to support the GLC in preparing the implementation plan.

Introduction:

This report has been prepared at the request of the Council of the Professional Engineers Ontario . It is intended to evaluate the Government Liaison Program initiated in 2005 and to make recommendations for its improvement. The report summarizes the audit approach that has been used, the findings from over 70 interviews and review of numerous PEO documents, the recommendations that have been developed from these findings and suggestions for developing an implementation plan.

Background/ Context:

Initiated in 2005, the Government Liaison Program has become an important part of the on-going activities of the PEO. It has been enhanced with the establishment of the Government Liaison Committee, in 2011, and local Chapter Committees.

As stated in the GLP Chapter Manual 2015: "PEO's Government Liaison Program (GLP) was established to ensure government, PEO members and the public continue to recognize PEO's regulatory mandate, in particular its contributions to maintaining the highest level of professionalism among engineers working in the public interest. Ultimately, the goal is to have government view PEO as a partner, and understand and support PEO's policy direction.

The main messages of the program are:

- PEO has a legislated mandate under the *Professional Engineers Act* to regulate the practice of professional engineering in the public interest.
- The self-regulating engineering profession in Ontario—comprising over 80,000 professionals—has been successfully protecting the public for more than 90 years.
- PEO has unique knowledge and expertise and it is in the best interest of government to consult with it before considering new policy directions that may have the potential to impact the regulation of the practice of professional engineering."

After 10 years, Council has decided that a review of the Program would be appropriate in order to determine if it is being implemented as intended and achieving the expected results.

When considering the findings and recommendations in this report, readers should keep in mind that:

- Government Liaison Committee members, Chapter GLP Chairs and sub-committee members are all volunteers
- One year term for GLP Chairs may result in frequent turnover
- Chapter sizes (#of members, geographic area) vary greatly
- Number of MPPs/ ridings per Chapter vary and may overlap
- Funding for GLP activities is quite limited
- Until recently, the Manager, Government Liaison Program had additional responsibilities beyond the GLP.

Audit Approach:

The audit approach was based on the statement of work provided in the Request for Proposals dated May 13, 2016 which specified various documents to be reviewed and groups to interview. Once an initial document review was completed, an Audit Design was prepared for PEO approval (See Appendix I). During this approval stage, the specific audit criteria and areas of concentration were confirmed. The main questions to be addressed in the audit were:

1. Is the Program working as intended?
2. Is it achieving the desired results?

It was determined that the area of concentration should be on those aspects of the program directed primarily to the provincial government and MPPs. It was also agreed that a group of MPPs should be added to the interviews in order to obtain their perspective on program results and suggestions for improvement.

Focusing more on MPPs, the initial list of audit criteria was reduced to:

Original objectives and current results expectations being met?

- Government continues to recognize PEO's regulatory mandate
- No government incursions in self-regulation of the profession
- No erosion of engineering as self-regulating profession
- Raise PEO profile at Queen's Park
- Educate legislators on PEO's role, issues & its value
- Current results expectations

Government Liaison Committee functions

- Oversee integration of GLP into each Chapter
- Communication/ feedback to Council
- Training Sessions
- GLP Newsletter
- Events

Chapter Committees fulfilling key responsibilities

- Coordination / Management
- Recruitment of members
- Activities
- Reporting
- Liaison/ communication

A series of questions were designed to gather information that would test the various audit criteria and gather information and suggestions that would lead to recommendations for improvements. The questions were compiled and grouped in four interview guides, one for each group to be interviewed – Councillors, Government Liaison Committee members, Chapter GLP Chairs and MPPs.

Separate email notices were sent to the three PEO groups advising them of the study and requesting their cooperation in making time available for a 30 minute interview. A subsequent email was sent requesting their availability within a two week timeframe. It was recognized that some members would

not be available over the target timeframe and a follow up email was sent giving an extra week to schedule an interview.

For the MPP interviews, a sample was selected based on advice from the communications consultant, Howard Brown, and the Registrar. It was agreed that Mr. Brown should contact the MPPs' offices to schedule the interviews and he did an excellent job in obtaining time from very busy MPPs.

Overall the response rate was excellent:

- Members of Council – 19 of 26 or 73%
- GLC Members – 11 of 12 or 92%
- Chapter GLP Chairs – 24 of 36 or 66%
- MPPs – 11 of 20 requests or 55%

A questionnaire was designed to gather supplemental information from Chapter GLP Chairs. While the response was quite limited, some additional information was gathered from this source.

Audit Findings

Achievement of Results

- **Audit Criteria**

The key question here is whether the program is achieving the desired results. This was approached from the basis of the original program design and, secondly, from the current perception of results expectations. The criteria examined include:

- Has the GLP raised the profile of PEO at Queen's Park?
- Has the GLP educated legislators on PEO's role, issues and its value?
- Government continues to recognize PEO's regulatory mandate.
- There have been no government incursions in self-regulation of the profession and no erosion of engineering as a self-regulating profession.
- Are current results expectations being met?

Interview questions addressed each of these criteria and the analysis of responses is summarized below.

Original Program Objectives:

Based on interviews, these are the perceptions of Council members, GLC members and Chapter GLP Chairs with respect to some specific results set out when the GLP and the GLC were established. Relevant comments from MPPs are also included.

Has the profile of PEO at Queen's Park increased since the GLP was initiated?

All respondents who had been involved with the program long enough to form an opinion felt that the profile of PEO at Queen's Park had increased at least somewhat over the last few years. The example most often sighted was the increase in the annual Queen's Park Day attendance by MPPs.

MPPs were asked - What do you think the PEO does well in its interactions with members of the provincial legislature?

Overall, the comments were quite positive and reflect significant improvement since the GLP was introduced. Some thought PEO was doing a good job communicating its message and that H. Brown was quite effective. Others mentioned Queen's Park Day and other events, respect, professionalism and trust in PEO and PEO was seen as trying to help.

Are legislators better educated on PEO role, issues, and value?

With respect to whether messages on PEO's role, issues and its value are being received by MPPs, the perception was not quite as positive. While a majority of respondents felt that overall legislators were more knowledgeable than before GLP, some said it had not made a difference or that only some MPPs were more knowledgeable but not the majority of MPPs.

When MPPs were asked if they were familiar with any issues that PEO was promoting and whether they supported the PEO position, over half of those interviewed were familiar with the industrial exception issue. However, only one of the 6 supported the PEO position and, although some were sympathetic to the PEO position, they understood the counter arguments and supported the Cabinet position. Other issues mentioned were Elliott Lake, infrastructure, expanding students in engineering and increasing the number of engineers. Most MPPs indicated they supported PEO on these issues. Several were not aware of any issues or policies being promoted by PEO.

Do you believe that the provincial government (MPPs, Cabinet, senior public servants) recognizes PEO's regulatory mandate?

- 1) Council: The majority of Councillors did believe that the provincial government, in general, recognizes the mandate of PEO. Many did qualify their response by indicating that some/ many MPPs may not fully understand PEO's regulatory role. Some stated that more education is needed for MPPs (and PEO members), while others indicated that MPPs may know PEO mandate but still do not support PEO's position (eg. on industrial exception).
- 2) Government Liaison Committee: Almost all GLC members interviewed feel that the provincial government recognizes PEO's regulatory role, at least to some degree. Many qualified their response indicating that some MPPs don't recognize the mandate or choose to ignore it and some are confused with OSPE. Several indicated that more needs to be done with better focus on Cabinet and that PEO is not as effective as other lobbies (eg. CME).
- 3) Chapter GLP Chairs: Almost all the Chapter GLP Chairs believe that the government does recognize PEO's regulatory mandate to some extent. Similar to the other 2 groups, many did qualify their responses and their perception was quite often based on their local MPPs. Some noted progress since GLP established, but building the relationships and understanding of the mandate is an on-going process, still more work to do.

- 4) MPPs – When MPPs were asked what they understood the mandate of PEO to be, there were a number of different responses. Only 3 of 11 interviewed mentioned regulation or self-regulation, while representing members or providing an association was mentioned most often. Promoting, lobbying or advocating were mentioned by 4 while communicating with MPPs or the public were mentioned 3 times. One MPP was confused as to which organization was regulation/ discipline vs advocacy and suggested a name change to better distinguish the organizations.

There have been no government incursions or erosion of engineering as a self-regulating profession.

These issues were raised only with Council members as it was assumed that they would be in the best position to be aware of any government incursions or erosion of PEO's self-regulating role. Council was divided on their view of government incursion, many citing industrial exception and Building Code issues as examples of incursion. In addition to these issues, the recent mall collapse and bridge failure may have eroded public and political confidence to some degree. PEO needs to be vigilant and respond appropriately to calls for continuing professional development.

Findings:

With respect to the original objectives of the program, the responses from all interviewees indicate that the profile of PEO at Queen's Park has been raised. Furthermore, from the MPP responses it appears that PEO and engineers in general have a positive, professional image. Given the small sample of MPPs, these findings should not be extrapolated to all MPPs.

MPP awareness of the role of PEO, and specifically its self-regulation mandate, was weak with other perceptions of the role coming to mind. It was also the sense of Council members, and to a lesser extent GLC and Chapter GLP Chairs that more work needs to be done to reach more/all MPPs with the message on role.

MPPs had a higher awareness and understanding of the "industrial exception" issue. Although most did not support the PEO position on this issue, it did illustrate effective communication. MPPs generally had a high regard for the value of engineers and their advice.

On government incursions or erosion of engineering as a self-regulating profession, some Council members cited examples that they felt were incursions on the mandate. While no amendments to the Professional Engineers Act have resulted, PEO needs to monitor all proposed legislation closely.

Recommendations:

1. Assuming the original objectives of the program are still valid, more work is required to clearly and consistently communicate the role and mandate of PEO.

2. A strategy should be developed to target certain Ministers and MPPs who are considered a high priority for understanding PEO's role. The strategy should also seek to reach all MPPs and achieve a level of awareness with all MPPs.
3. GLC should continue to monitor all proposed legislation or changes to legislation in order to detect any potential incursions on the self-regulating role of PEO.

Current Results Expectations:

All three PEO groups of interviewees were asked several questions about their expectations for results from the GLP and whether they thought these results were being achieved.

Results Expected:

What results do you expect from the Government Liaison Program?

For each group, the responses tended to fall in three categories – awareness/ relationship building, understanding and influence/ support – with MPPs being the primary focus. The results expectations for each of the three groups are summarized below.

- 1) Council: The majority of Councillors interviewed expected PEO and the engineering community to have more influence with and gain support from MPPs as a result of the program. Others referred to increasing awareness and understanding among MPPs. Notions of partnership, being on the same side as the government and having a seat at the table were also expressed. Some hoped that politicians would understand the role and importance of engineers and seek their advice.
- 2) Government Liaison Committee: The majority of GLC members interviewed expected the program to increase MPPs awareness of PEO and its mandate and to establish good relationships. Some wanted to see PEO influence government decision making and have MPPs/ government come to PEO for advice. Other expectations included making engineers aware of how government operates, encouraging some to run for office and compiling statistics to relate safety to PEO.
- 3) Chapter GLP Chairs: The majority of Chapter GLP Chairs wanted the program to assist MPPs in understanding and appreciating engineers and PEO. Others wanted to go beyond understanding and have influence with MPPs and gain their support. Some other results expectations included making engineers more aware of the political system, helping members get into elected positions, avoiding legislative surprises and broadening the scope of the program to include municipal government.

Chapter GLP Chairs were also asked about their own local program – “What results do you expect from your Government Liaison Program?” Most respondents indicated that they expected to increase awareness and build relationships with MPPs. Some mentioned increasing understanding and gaining support or having influence with MPPs, while a few mentioned raising awareness with PEO members.

Their expectations included building rapport and good relationships with local MPPs, being able to contact and influence them and have MPPs seek their input.

While the main themes of awareness, understanding and influence were evident with all three groups, there may be an opportunity for better alignment as the program evolves.

Results Achieved:

When the same groups were asked – “Are you aware of examples illustrating that these results are being achieved?” –the perception of results achieved varies as well.

- 1) Council: Councillors were about equally divided on whether there were examples to illustrate that the results they expected were being achieved. However, the examples quoted were usually increased awareness, participation in PEO events, some improvement in understanding but not influence.
- 2) Government Liaison Committee: On the other hand, almost all GLC members interviewed were able to refer to specific examples of influence on legislation and not just awareness and understanding by the government. Examples included challenge to the Building Code Act, adding “engineer” to legislation and success with 65 amendments to the “Open for Business Act”.
- 3) Chapter GLP Chairs: Most Chapter GLP Chairs had examples of their results expectations being met. These were often cases illustrating positive relationships with and support from local MPPs. Examples included MPPs attending GLP Academies, take an MPP to work days, PEO Chapter events and local MPPs speaking in support of engineers in the legislature. Some Chairs indicated they were too new in the position to have any examples of results. The ‘industrial exception’ issue was often cited as a negative example.

Findings:

The three common expectations expressed –awareness/ relationship, understanding and support/ influence –illustrate reasonably good alignment across all 3 PEO groups. However, the emphasis for each group was different –Council stressed influence, GLC awareness and Chapter GLP Chairs understanding.

The GLP Chapter Manual states that “Ultimately, the goal is to have government view PEO as a partner, and understand and support PEO’s policy direction.” This implies moving beyond awareness to reach understanding and support. If viewed as a continuum, the stated goal is to reach the support/ influence stage, but not all of the 3 groups have that expectation.

While Councillors wanted PEO to influence government/MPPs, they did not quote any examples where this had been achieved. GLC members expected awareness and a good relationship, but referred to examples of influence. Chapter GLP Chairs hoped to achieve understanding, but had examples of good relationships and support including local activities and speaking positively in the legislature.

Some examples, such as helping members get into elected positions and broadening the scope of the program to include municipal government, indicate that more focus may be required.

The findings indicate an opportunity for better alignment of expected results among the three key groups involved.

Recommendation:

4. Expected results for the program, both short term and long term, should be clarified and clearly communicated so that Councillors and GLC members have the same understanding.

Compliance with Program Design

• **Audit Criteria**

In order to answer the question “Is the Program working as intended?”, several criteria were examined. The GLP Chapter Manual provides an excellent description of program design and intended operation including the responsibilities of Chapter GLP Committees. The criteria examined include:

- Oversight and integration of the GLP into each Chapter
- Coordination of the program at Chapter and PEO levels
- Chapter Program Management – structure, processes (planning, budgeting), recruitment of members, reporting/ information flow and liaison/ communication.
- Training of GLP volunteers
- GLP Weekly Newsletter
- Events/ activities

Government Liaison Committee Functions:

Interviews with Council members, GLC members and Chapter GLP Chairs addressed expected results for the Committee and several of its key functions.

Council’s view of GLC Expected Results:

What results do you expect from GLC? On this question, Councillors had a broad range of expectations that were expressed in many ways. The most common themes were strategic leadership, clear communication/ messaging and coordination/ control of the program. Some expected specific results - realize material change; legislators seek engineers help; education for all Chapters; suggest types of activities; strong statement on selection of key spokespersons. Others expected a broader scope - input

to all members on government issues including federal, municipal; policies, guidelines to focus on the public.

GLC Members view of their Committee's Expected Results:

What results do you expect from the Government Liaison Committee? Committee members also had a broad range of views which could be categorized in five areas –government relationship; relationship with Council; relationship with Chapters; connecting with other groups and a focus on issues.

Committee members' comments can be summarized:

- Government relationship – Monitor and be the lens of PEO to Queen's Park. Link PEO Executive to government. Track future events, issues. Be proactive, get out in front. Be the direct interface with government. Be active on the political side. Develop relationship with government and strengthen involvement with MPPs.
- Council relationship - Need to enhance position in Council. Should get direction and mandate from full Council. Improved communication & reporting to Council.
- Chapter relationship – Need to provide oversight for the program. Track future events, issues. Focus on issues. Provide direction to Chapters. Help Chapters and direct the interface with government. At local events be clear on expectations. Plan every meeting and monitor every meeting (QPD; Take MPP to work day).
- Connecting with others - Connect with other committees; invite other PEO members (eg. Prof. Dev.) to meetings. Learn how to find/ foster allies (e.g. Labour unions).
- Focus on issues - work on industrial exception. Focus on regulatory mandate, legislative issues. More meat in agenda (too routine).

Findings:

The GLP Chapter Manual states that the Government Liaison Committee (GLC) was created in 2011 "to provide oversight for the Government Liaison Program". Councillors' expectations of strategic leadership, clear communication/ messaging and coordination/ control of the program would appear to be consistent with the oversight role.

Some GLC members referred to their relationship with Chapters in terms of oversight, tracking events/ issues, providing direction, directing the interface with government and providing clear expectations. These would appear to be consistent with the oversight role, but more specific.

Some GLC members also recognized the importance of their relationship with Council, other committees and allies in addition to the primary relationship with the provincial government.

Recommendation:

5. Expected results for the GLC, both short term and long term, should be clarified and clearly communicated so that Councillors and GLC members have the same understanding. This would include confirming GLC oversight and direction responsibilities, decision making/ advisory

authorities and a clear message to be communicated. This may require an update of the GLC Terms of Reference to include any appropriate changes.

Council's Perception of GLC Results:

Council members were asked whether the Committee has been successful in ensuring that the GLP has been integrated into each Chapter? Their responses were almost equally divided between no, yes/somewhat and don't know/not sure. Comments often acknowledged that the integration of the GLP into each Chapter depends on the situation and level of activity in the Chapter. Some gave credit to staff and consultant efforts.

GLC members' view on this question was quite different. Most felt that the committee had been at least somewhat successful in ensuring that the GLP had been integrated into each Chapter. In some cases, they acknowledged that their perception was based primarily on their own Chapter/region or that they weren't sure it applied to all Chapters. One member correctly pointed out that this expectation is not in the "mandate" (terms of reference) of the GLC.

Findings:

As part of the long-term strategy enunciated in the Chapter GLP Manual, Council advised the Government Liaison Committee (GLC) "to oversee the integration of the program into the chapter".

The differing perceptions on the degree of integration of the GLP in Chapters suggests that this is not being tracked or reported. (See discussion below on reporting.)

Reporting/ Information Flow

Reporting and information flow were identified as important components of the GLP design. Questions were posed to Council members and GLC members on this topic.

Councillors were asked - Is the information (e.g. plans, reports) provided to Council sufficient? Almost half of the Councillors interviewed did not think that the information provided to them concerning the GLP was sufficient. Others found the information provided sufficient or somewhat sufficient. Some were not sure or did not know. Their comments included:

- Don't remember a report from GLC
- No, most committees do not report regularly. Didn't know it existed until last 6 months.
- Probably not. Don't get regular reports or monitoring. No standing item on agenda.
- No knowledge.
- No. What they do is a mystery.
- Close to sufficient. Would welcome more info (eg. more for new Councillors). Agenda item for every meeting of Council.
- Not sure what they are doing.
- Should ask for what we want. Have been receiving significant material; big agenda package.
- Don't think so. Not much available. Light on substance.
- No regular reporting. Will deal with specific issues.

- Underwhelming, not focused. Does not grab attention. Would like 1 page with graph. Power point with stats.
- No performance measures, results or impact.
- Quite good job.
- Could refine communication. Need to think about communication strategy, focused presentation. Can always ask for information and go talk to staff.

GLC members were asked - Is the information (e.g. plans, reports) provided by Chapters (to GLC) sufficient? The majority of GLC members interviewed felt that the information provided by Chapters was at least somewhat sufficient. Most indicated that some improvement should be made or that work is underway to improve reporting. Their comments included:

- Sufficient information only for issues.
- Capacity issue, large variation among Chapters. Should have photos.
- Need to connect better (e.g. on funding). Should not have to struggle on funding. Need to be clear on what is funded.
- Fiscal reports to GLC being established (what has been done, who involved).
- Think so, but not sure. Good access to information but need more meat. Chapters are proud of meetings with MPPs/ Ministers.
- When we ask, get good reporting. Project underway to set up reports (electronic).
- Not too sure, little detail. Some detail provided at Committee meetings & in minutes.
- Formal feedback needed.

The document review and questionnaire responses indicated that some Chapters prepare regular reports for their Executive Boards and their AGM but these are not routinely sent to GLC or PEO HQ. A form for reporting on meetings with MPPs is available for Chapter use and a copy is to go to PEO HQ, but few of these are completed. Automation of this form using "Survey Monkey" is underway. The GLC annual report and the GLP section in the 2015 QA Booklet provide an excellent overview of activities, but contain little information on program results. GLP Information Notes appear to provide useful information on specific issues, but these were not examined in detail.

Findings:

While the Chapter GLP Manual identifies reporting as a "key function" and is quite explicit on the responsibility of GLP Committees to report quarterly to their Chapter Executive and annually to their AGM, little is covered on reporting to the GLC or PEO HQ. Similarly, there does not seem to be any specific requirement for GLC reporting to Council.

The GLC Terms of Reference include:

- Coordinate the activities of the Government Liaison Program.
- Establish, receive and review reports from PEO

committees as it considers appropriate.

There is also an expectation, based on the interviews, for more or better reporting on GLP activities and results for the Council and GLC.

Recommendations:

6. GLC should work with Council and Chapter GLP Chairs to determine reporting requirements for Council and the GLC and establish systems and procedures to meet these requirements. To the extent possible, the requirements, systems and procedures should build on information already collected or needed by the Chapter GLP Committees and should consider the limited volunteer time for reporting activities. Automated reporting tools should be employed wherever feasible.
7. Council should consider establishing a regular agenda item for GLC reporting and direction.

Training

Training expectations from GLP Chapter Manual:

Training Sessions - Each year, a series of program training sessions will be held for members participating in the Government Liaison Program. These are to include:

- The nature/scope of the program
- Tips on building relationships with MPPs
- Updates on current issues impacting the role of PEO and the self-regulating profession
- Updates on PEO messaging and positions

A notice will be distributed through the chapter executive to advise of upcoming training sessions. Upcoming training will also be announced in the GLP Weekly newsletter.

Training Delivery:

This is done primarily through GLP Academies which have been held 4 times most years. Based on sample agendas for 2013, 2014 and 2015, topics covered have included:

- How to get your policy into legislation
- Government structure
- Who's who - look at the key Ministers, Critics and other MPPs in Queen's Park
- What do I talk about? – GLP Issues and Information Notes
- Role playing - Attendees receive practice in meeting politicians and discussing issues
- Lay of the land - overview of the current political landscape.

An introduction to GLP and a 'GLP Congress' session are normally included as part of each Academy agenda. During the 'Congress' sessions, each GLP Chair or rep will make presentations or speak for 5-10

minutes to discuss past achievements and future goals. They will also discuss how all the GLP Chapters can work together to grow and promote.

Interview Analysis:

All three groups of PEO interviewees were asked – “Is training for PEO participants/ representatives sufficient?”

- 1) Council: The majority of Councillors considered current training to be sufficient or somewhat sufficient. Some were not sure or not familiar with the training. While a few felt it was not sufficient. Comments included:
 - Training positive & critical, but not sufficient. Need to select good participants. Brown comes to all, ensures consistency, targets MPPs. Regulation focus but not getting full value.
 - Need more.
 - Increase to ensure clear understanding (message). Do shortly after election/ annually. Very important.
 - PAN doing better job (prior to meetings provide briefing note, indicate expected result, goal clear). Need to bring OSPE rep to meetings and vice versa.
 - Lots of opportunities for training, but don't know if all get training. Consistency issue. Reps may deviate from messages or add own items. All contacts should be reported.
 - Train Chapter committees, with more on activities.
 - QPD – info provided late. Basic training, but need improvement.
 - Initially good, but now repetitive; nothing new. Need to refresh curriculum; adopt train the trainers approach.
 - Need to monitor training, at least once a year.
 - Should pick hot topics & make sure they are covered. Use mock meetings to make participants more comfortable. Listen but also convey position. Not lobbyists but could align with them as they may be more effective.
 - Academy very good for GLP Chairs, but not all people covered.
 - Should put training on web/ do webinars.

Council suggestions:

- After election engage new people on issues important to PEO with consistent message and regular follow up.
- Give them “sound bites” to use. Tell people what not to do. Avoid different messages (coordinate).
- Potential for info on web site. Need more lead time, organized info on issues to cover.
- Convenient communication (eg. video conference); volunteers have less time. Same (Council endorsed) messages from all Chapters to MPPs.
- Leadership, education for all Chapters, suggest types of activities.
- Get out a consistent message.

2) GLC: The majority of Government Liaison Committee members felt that the current training was sufficient or somewhat sufficient, while some did not know or were not sure. Comments included:

- Very ambitious. Engineers not used to speaking to politicians.
- Volunteer time a constraint (& maybe dress code?).
- Academy works well.
- New Chairs being trained. This is important.
- Some issues with language.
- Need part experience and part training.
- Good training program, but may not be right (for our needs).
- May need follow up training.
- Aren't tracking who has been trained (staff role).
- Training for volunteers is general.

GLC suggestions:

- Need to focus on core (3-5) issues & PEO position. How to communicate these. Provide updates on key issues.
- Understand issues important to MPPs.
- More unified voice (with OSPE) when speaking with government.

3) Chapter GLP Chairs: Almost all of the Chapter GLP Chairs who had participated in training indicated that it was sufficient or somewhat sufficient, while some had not had training. Their comments included:

- View as a process with more experienced Exec members.
- Overall training well structured. GLP Academy (East Ont.) great for new members. Always 2 or 3 MPPs attend.
- Training is sufficient but hard to find time.
- Academy provided better sense of program & HQ contacts. Short term sufficient.
- Session after AGM. GLP Academy was good, but could only send one; should allow more.
- Academy training good introduction, some tactics. First best; got less from 2nd & 3rd. More emphasis on MPP staff would be valuable.
- Good training on approaching MPPs. Training for election to office.
- GLP conference (Academy) combined with QPD not sufficient. Could add webinar.
- Went to PEO training and team has access to material. Should have social network app; use webinar.
- Got training slides only.
- Academy is good. Harder for members from Windsor. Should do Chapter level (train trainer).
- GLP Academy good but at year end. Should do after election. AGM day could be expanded.
- Sufficient from starting point of view.

Chapter GLP Chairs suggestions:

- Only once a year meeting; need more sessions (work shops). Not enough time to address Chapter/ regional issues (eg. how to handle first meetings with MPPs).
- Relationship building key. Seek to understand MPP needs.
- More clarity on direction. Tips on best activities to get most value from engagement. Need to reinvent GLP and educate PEO on government.
- Attended PEO conferences, but program hard to apply to Chapter.
- Coordinate training earlier after election (May rather than April).
- Clear message to go to MPPs (4tly or annually).
- Reach out to municipalities (Mayors/ Reeves) and invite to Academy.

Findings:

The review of sample Academy agendas indicates that the topics specified in the Chapter GLP Manual are being covered.

Interviews indicated that some Chapter GLP Chairs had not had an opportunity to attend one of the Academies. Some also indicated that they would like to have others besides the Chairs attend this training.

There does not appear to be a system to monitor coverage and follow up to ensure that all who need training are receiving it.

While the majority of interviewees felt that the current training was sufficient or somewhat sufficient, the individual comments indicated that there is room for improvement.

The most frequently suggested improvements were:

- Need to reinforce clear, consistent messages
- Current training may be sufficient, but should do more
- Good for new members, but may need more advanced, different topics for others
- Timing important for newly elected Chairs
- Use different delivery mechanisms – web based, social media app, seminars, work shops, video conferences, Chapter level.
- More should be done to cover activities that Chapters should undertake to implement GLP.

Recommendations:

8. Objectives, target audience and expected results for training sessions should be clear. This should include clear, consistent messages that are to be communicated or reinforced through training.

9. Build on current training material and resources to expand training to meet the needs of different GLP participants.
10. Tailor some training/ orientation to newly appointed Chapter GLP Chairs. Several new chairs mentioned that they would have appreciated training shortly after their election rather than months later. This training could be more specific to the needs of a new Chair and would help them get off to a good start.
11. Offer several training options in addition to Academies. These could include web based training (already developed but not yet implemented), video or teleconferences. Web based tools could provide on demand training and a library of special topics. This would recognize time/ travel constraints for many volunteers.
12. Participation in training events should be encouraged and reported. All chapters should participate for coverage and consistency. Follow up should be done with Chapters not participating.
13. Consider adding more content dealing with best practice Chapter GLP activities.

GLP Weekly:

Members of the GLC and Chapter GLP Chairs were asked - How does the GLP Weekly Newsletter contribute to the work of the Committee/ Program?

- 1) GLC: Almost all of the Committee members felt that the weekly newsletter made a positive contribution to the program. Most saw it as a good communication tool and several felt it was useful for sharing ideas. A few found it useful for planning, communicating to MPPs and recognizing successes. Only one indicated it did not contribute to the work of the Committee. Specific comments included:
 - Good way to communicate. Not aware of readership.
 - Assists oversight role; provides update on what Chapters are doing. Value for other Chairs – sharing knowledge.
 - Highlights successes; sharing of info; others can learn (do similar functions).
 - Too long (what can I learn?).
 - What has been done in past week; upcoming events (picked by H Brown) to attend.
 - Don't know how it contributes, but illustrates many active Chapters. Carries message of GLC to Chapters & to MPPs. Illustrates what others are doing & upcoming events.
 - Makes Committee look "awesome". Better than writing report. Celebrates events, timely sharing, record of events, share with MPPs.
 - Keeps members up to date on PEO & government activities. Not for planning, but after event reporting.
 - Doesn't contribute to my work on Committee; not a focus.
- 2) Chapter GLP Chairs: The majority of interviewees saw the Weekly as an informative, communication tool. Many felt it was useful for planning and sharing ideas. It was also seen as a

good means to communicate to MPPs and to give recognition to Chapters. Unfortunately, several (new Chairs) were not receiving the Newsletter (this has been corrected). Specific comments included:

- Gives idea of what others are doing & future activities (of MPPs).
- Upcoming events; quick update; read every week. Use to plan/ identify opportunities.
- Showed to MPP & he was impressed
- Update on what others are doing, get ideas. Howard very helpful.
- Makes me aware; ideas for events; good info.
- Photo opps. Report on meetings, but not much meat; little results.
- Encouraging to scan, see events of interest. Others dealing with same issues.
- Receive and read occasionally. Useful to have – know what others are doing, hot topics.
- More coverage for York (recognition/ reward); get your name out. Not too deep on info.
- Informative, helps plan attendance at activities. Know what MPPs are doing.
- Enjoy reading, see what others are doing. Look for events to attend.
- Gives MPPs sense of what other MPPs are doing with PEO.
- Raises flags on issues (eg. Cabinet shuffle). Shows participation. What's upcoming.
- Make us aware of PEO mgt. and other Chapters' interaction with MPPs. Get ideas.
- Great! Always read. Use to raise issues/ plan with Exec. Lessons learned.
- Very good resource. Brown critical; not volunteer. Needs info to do job – updates.
- Informative, encouraging, future events. Should distribute more broadly.

Observations from review of sample issues of the newsletter:

The primary audience is both PEO chapters so that they are aware of the activities that are happening, and politicians so that they are also aware of PEO activities and also wish to be profiled in the newsletter for their own visibility.

Anyone, including members of the public, may ask to join the distribution list. The current distribution list of about 600 includes PEO members, MPPs, city councillors, bureaucrats, students, etc.

From a review of a sample of newsletters from 2011 to 2016, the following observations were made:

- Professional presentation, well organized, easy to read with main topics listed.
- Photos and list of upcoming events take up a large portion of space. Many photos show mainly faces/ bodies with name and title caption.
- Role of PEO repeated/ reinforced in all issues –“Through the Professional Engineers Act, PEO governs over 80,000 licence and certificate holders and regulates professional engineering in Ontario to serve and protect the public. Professional engineering safeguards life, health, property, economic interests, the public welfare and the environment.” Good reinforcement of message.
- Coverage seems to be mainly on participation at events.
- Where “meeting” or “discussions” with a Minister/ MPP are reported, there is usually no reference to results or follow up which could appear in a subsequent newsletter.

Recommendations:

14. GLC and Council should confirm the role of the GLP Weekly and its primary audience in the context of an overall strategy for the Government Liaison Program, the communication strategy for PEO and its relationship with Engineering Dimensions, GLP Information Notes and other communication products. Based on current usage of the newsletter, the role could include planning, reporting/ communicating, sharing ideas or providing recognition. The audience could range from Chapter GLP Chairs, Chapter Executives, GLC and Council to all PEO members to MPPs, their staff and senior public servants.
15. A more efficient option for planning should be considered in order to eliminate the repetition of upcoming events in the newsletter and to provide more guidance on priorities for attendance at events. An on line calendar of events with colour or some other coding to highlight the most significant events could be maintained and populated with key events well in advance.
16. GLC, with Council endorsement, should confirm the main message or messages it wants to convey to its primary audience.
17. When reporting on events involving MPPs or other officials, comments on results, reactions or follow up should be included wherever possible. This could be included in guidelines for volunteers or staff reporting on events.
18. To facilitate follow up on results or outcomes of events or meetings, the initial event reported could be flagged for follow up (eg. a meeting or conference dealing with an important issue).
19. To provide more depth/ substance, perhaps one article per issue should develop a priority theme or message. For example, interviews with Chapter GLP Chairs in early 2012 provided more depth.
20. Establish a searchable data base or search tool that would facilitate searches by topic, Chapter or individual. This would facilitate easy extraction of items on a particular issue or events attended by a particular MPP.
21. Costs and delivery methods should be compared to similar newsletters for other organizations. This was beyond the scope of the current study.

Events:

One of the means of achieving GLP results is through organized events. All three PEO groups and MPPs were asked about their participation in PEO organized events and the effectiveness of these events.

- 1) Council: Most Councillors had attended at least one PEO event organized to engage MPPs. Queen's Park Day was most often mentioned, and some felt it was effective, but more for awareness than results. Others felt that one on one meetings or special meetings organized with a small group were most effective. Comments included:
 - No benefit for \$300 dinner. Should focus more on staff (engagement/ training)
 - Need follow up to events/ meetings; need better selection of participants

- After election PEO organized meeting with new Ministers (still on learning curve) and this was very effective. Talked about issues/ challenges face to face. Committee recommended topics to cover.
 - MPPs came to speak to us helping to understand them. Going to reception just to get a picture not that effective. Need follow up.
 - Have met ~1/3 of MPPs; can call and talk to them. Queens Park Day effective. Met AG several times a year. One on one contacts effective; can connect with MPPs' issues.
 - One on one most effective
 - QPD most effective; however, some MPPs don't attend. Also lack of volunteer interest.
 - QPD good food/ drink but only seeing one element. No longer effective - \$wasted. Nothing with public or opposition parties.
 - QPD good face to face contact. Meetings in MPPs office organized by Chapter. Take MPP to work. Invite MPPs to PEO events.
 - Need to have right people to participate.
 - Parliament Hill Day (Ottawa) talked with MPs but not sure if they were engaged. Need dialogue/ follow up.
 - Need more attention to public servants.
 - Not effective for results; effective for awareness. QPD many cabinet members/ MPPs become aware.
 - All candidates meeting could be good.
 - At wine & dine events no time to discuss issues.
 - Don't know if events effective. Could more follow up help?
- 2) GLC Members: Almost all Committee members had attended at least one event. Several mentioned Queen's Park Day and Take your MPP to Work Day, with the later seen as more effective. Comments included:
- Some events very effective (e.g. Tech Town Hall). MPPs want to work on issues (e.g. private members bills); need technical support.
 - Take MPP to work helped give them insight on work of engineers. QPD was an opportunity to talk to people (40- 50 MPPs attended).
 - QPD good. Take MPP to work is a tailored event, creates dialogue, exposes MPP to what engineers do & work of PEO, introduction to a company.
 - QPD good for interaction, very effective –learn, raise issues, 2-way communication; helps to develop relationship.
 - Effectiveness of events limited; viewed as photo opps (not dealing with substantive issues or moving MPPs along on understanding). Need to stay on messages, issues.
- 3) Chapter GLP Chairs: Almost all Chapter GLP Chairs had participated in at least one event organized to engage MPPs. Several indicated that face to face meetings with the MPP (usually in their office with OSPE rep) were most effective. Other effective events were the Take MPP to Work Day, Queen's Park Day and all candidates meetings. Specific comments included:
- MPP to work day – MPP amazed by factory, then spoke about it in House.

- Constant series of activities. Need to participate and be seen. Formal meetings, inviting MPPs to Certificate presentations. Take MPP to work.
 - At local events, make sure MPP is comfortable. Have good relations and MPP is keen to attend.
 - By election meeting with candidates had good response.
 - In 4 years, Industrial exception biggest issue. Informal lunch meeting with MPP & OSPE rep had most effect.
 - QPD. Attended Liberal event in Thunder Bay, but not enough face time.
 - QPD – not sure if effective. Most MPPs don't come.
 - OSPE/ PAN meeting with Minister. Got his advice on how to influence policy
 - QPD, caucus events are effective.
 - Joint meetings with OSPE in MPP's office most effective. Difficult to get material on PEO position.
 - MPP's events with other organizations. Recognize & give credit to him as a result of relationship being established.
 - MPP at our AGM, spoke to group & takes engineers seriously. Also one on one.
 - All candidates meeting very effective. Very limited budget for 5 person committee attending MPP's events & public events.
 - Take MPP to work – undivided attention.
 - Face to face in office most effective. Chapter events (Licence ceremony), Engineering Month, annual picnic.
 - Face to face best (show passion, type of person you are).
- 4) MPPs: Almost all of the MPPs interviewed had attended several events organized by PEO. Queen's Park Day was most often mentioned and was also noted by some as one of the things that PEO does well in its interactions with MPPs. This effort also afforded them an opportunity to meet engineers from across the province. Some indicated that individual meetings where they could discuss issues and get input were more valuable. Participating in educational events, events with young people and PEO award/ certificate ceremonies were also mentioned. Specific comments included:
- Yes, many social events. They did assist in understanding their role.
 - Lobby day. Separate meetings with engineers at QP. Attended AGM/ Licence ceremony. Greatest value meeting engineers from across province at QPD.
 - QPD; individual meetings most productive; attended AGM in Toronto; attend annual luncheon in North Bay (for over 10 years).
 - QPD. Saturday morning education session – spoke at these (2). Opportunity to share understanding.
 - QPD, but not being educated through this event (well educated already). Should meet more in riding.
 - Graduation ceremonies, bridge building. Events for young people in particular.
 - QPD. Individual meetings more valuable.
 - QPD helped to understand role, many ways engineers touch lives of Ontarians (eg. infrastructure).

Document Review:

In their “Government Liaison Program Report 2005-2016” Brown and Cohen note the following with respect to events and PEO participation:

“Going hand-in-hand with MPP meetings is event attendance. Although meetings are a direct way to discuss PEO issues with MPPs, meetings are always about asking for something. Events, on the other hand, provide a great opportunity to show support for the MPP. It allows engineers to build relationships with MPPs outside of their office.

The relationships that PEO fosters through its event attendance open many doors for PEO. MPPs get a lot of requests for their time. The organizations that tend to get heard are those speaking with MPPs on a regular basis, attending events, hosting meetings and engaging them in the organization’s activities.”

OSPE comments: In an interview with an OSPE staffer, it was noted that it often takes up to 6 months to arrange a meeting with a Minister or MPP as there are many demands on their time.

Proposed legislation may restrict political fund raising events and this could affect access of PEO members to MPPs.

Findings:

Overall, Queen’s Park Day, individual face to face meetings with MPPs and Take MPP to Work Days seem to be most effective from PEO and MPP perspectives. While face to face meetings and dedicated attention are desirable for achieving understanding and gaining support on issues, these may not happen without the ground work of awareness and relationship building through attendance at MPP events and inviting them to PEO events. Each Chapter has had varying degrees of success with up to 5 or 6 MPPs in their area and the approach may be different for each.

Recommendations:

22. Build on the success of the suite of events that are being used now , with minor adjustments if the rules for fund raising events change. Recognize the differences among Chapters and MPPs and that successful face to face meetings to discuss issues will only happen once a good relationship has been established. Ensure that when face to face meetings are planned, the right people attend, that expectations and approach are clear and that all PEO/ OSPE participants have the same briefing and agenda. Any required follow up for meetings or events should be documented and acted upon quickly.

Chapter Committees Fulfilling Key Responsibilities:

Delivery of the GLP and building relationships with MPPs depends, to a large extent, on the successful implementation of the program by Chapter Committees in all 36 Chapters.

Chapter GLP Activities:

To see how Chapter GLP Chairs were achieving results, they were asked - What are the main activities undertaken to implement the GLP for your Chapter? Most were undertaking or had planned several different activities to engage MPPs. The most frequently mentioned were inviting the local MPP to the AGM or Licence ceremony, Take your MPP to Work Day and attending MPP events. A number were meeting their local MPP at their constituency office. Other activities mentioned were inviting MPPs to participate/ speak at PEO training events, school events, engineering symposiums and candidates' debates.

Findings:

While most Chapters had some activities underway or completed, some did not or were still in the planning stage.

Recommendation:

23. All Chapters should be encouraged to complete at least one activity or event with each MPP in their area each year. Follow up should be done to monitor whether this is happening and to provide assistance as necessary.

Chapter GLP Management:

Several questions were asked pertaining to management of the program within the local Chapters.

How would you describe the structure of the GLP in your Chapter? – About half of the respondents had a sub-committee consisting of the Chair plus 2 or more committee members. The other Chapters were organized with only the chair, chair plus one or the chair plus members of the Executive team as required. Some larger committees would have one person assigned to each MPP in their area. Formal meetings were infrequent and usually for event planning. Several mentioned involving OSPE in meetings with MPPs and event planning.

What management processes are in place to help ensure coordination of GLP activities? About half of the interviewees did not have any management processes in place. In some cases they were new and had not had much time to get organized. In other cases, their level of activity did not justify any formal process. Some indicated that they had planning/ budgeting or reporting, while others relied on committee or work group meetings to coordinate activities.

Is the recruitment of members to participate in the program effective? – A majority of Chapter GLP Chairs indicated that the recruitment of members to participate was at least somewhat effective, while others felt that it was not and others were not sure or did not know. Some rely on members of the Chapter Executive to help out. In small Chapters, and even in some large ones, recruitment of volunteers is difficult (e.g. on short notice and for events on weekends and in the evening).

The questionnaire input indicated that the recruitment criteria are not being used and no formal selection process is followed. Some training or briefing material is usually provided to participants.

Findings:

The structure of the sub-committee depends on the level of activity and volunteers available in the Chapter. The committees may be one person or up to 4 or 5.

For the most part, management processes and meeting schedules are not required, although some had planning and budgeting. Planning is informal and centred around events.

Recruitment criteria specified in the manual are not being used. Where recruitment of volunteers is difficult, this may jeopardize the success of the program.

Since Chapters seem to be able to organize events with little process, finding the right volunteers is probably more important.

Recommendation:

24. Emphasis should be placed on recruiting more of the right people to volunteer for the Chapter GLP Committees.

Chapter GLP Support:

Is the GLP Chapter Manual a useful reference document? – Most of the respondents who had read the manual thought it was a useful document, especially for new members/ Chairs. A few refer to it occasionally. Unfortunately, about one third said they had not received it or did not recall seeing it. (These Chairs were all sent an extra copy.)

Is there adequate liaison with the central Government Liaison Committee, the communications consultant and the Manager GLP? – Almost all respondents felt that the liaison activity was adequate or somewhat adequate. The most frequent contacts were with the Program Manager, followed by the communications consultant. There were a few references to the regular conference calls (only 10 to 12 participate) and some suggestions for copies of GLC minutes/ decisions, more lead time/ advance material for meetings with MPPs, co-ordination with GLP Chairs for events in their area or in overlapping ridings and better communication among GLP Chairs. Most interviewees seemed to get prompt replies to questions when information was requested.

Findings:

The GLP Chapter manual is a valuable tool and distribution needs to be timely for new Chapter GLP Chairs.

The liaison/ communication between Chapter GLP Chairs and the Manager GLP/ communications consultant is adequate. Conference calls do not reach the majority of Chapter GLP Chairs. Some specific improvements could be made.

Recommendations:

25. The GLP Chapter manual should be updated if any significant changes are made to the program. Distribution to all Chapter GLP Chairs should be timely and verified.
26. Measures to increase quarterly conference call participation should be examined including taping and distribution of copies of the calls.
27. GLC minutes or extracts from the minutes should be distributed to Chapter GLP Chairs.
28. Electronic means of sharing information among Chapter GLP Chairs and HQ staff should be developed.

MPP Views:

When MPPs were interviewed there were several questions asked in order to gain some understanding of how they view PEO and to elicit their suggestions for improvement.

What do you think the PEO does well in its interactions with members of the provincial legislature? Overall, the comments were quite positive and reflect significant improvement since the GLP was introduced. Some thought PEO was doing a good job communicating its message and that H. Brown was quite effective. Others mentioned Queen's Park Day and other events, respect, professionalism and trust in PEO and they were seen as trying to help. Comments included:

- PEO here now (went from zero to positive). QPD well organized. Professional job, as good as any.
- H Brown does excellent job in getting access to MPPs. Events are among the best; local engineers attend & we appreciate this.
- Support for members of opposition party. Good on sharing facts eg. air/ water quality.
- PEO is respected. When they lobby it is in the public interest, not self-interest.
- Communication. Receptions – get good turnout, energy in room, good feel, well advertised, photographer there.
- Consistent messaging, on-going presence. Proactive, positive, look to how they can help.
- Lobbying efforts quite good (non-existent before 2004).
- H. Brown very good. PEO members should do more than just show up.
- H. Brown is effective, educates on issues. Key to work with public service (MPPs/ Ministers change).
- Educating parliamentarians. As issues come forward they provide input.
- Effective building trust, relationships. Demonstrate interest in issues; look for ways to help/ advise. Professional, prepared, right people. Relationship/ partnership not just 'transactional'.

What benefits do you see in your relationship with PEO as an organization and with its members? All MPPs interviewed saw some benefits in their relationship with PEO and its members. Several mentioned access to engineers' knowledge and expertise, an opportunity to discuss issues and non-partisan input or advice. Others mentioned understanding the engineer's role, encouraging youth to consider a career in engineering, promoting capital investment and local engagement. Comments included:

- Understands knowledge, skill, expertise of engineers in provincial matters; province can benefit.
- As critic for Infrastructure & Economic Development could touch base with PEO on issues (electrification of Go Train; Green Energy).

- Better understanding of their role & importance. Provide a non-partisan sounding board; not as self-interested as some groups.
- Opportunity to mix with members, identify obstacles, get better understanding of others' interests. Engineers familiar with infrastructure; gain better understanding & info from them.
- Good on-going dialogue, open. They offer to assist. Promote issues around investment.
- Province spending huge \$ (130B) on infrastructure. Need engineers/ architects ideas, input on priorities, advice on electricity, roads, etc.
- Knowledge, understanding. PEO should do better at this.
- Knowledge, connection to local outreach/ events. Important to get young people to consider engineering; grow the profession.
- Sessions in my office. Need to nurture young engineers (co-op programs like Waterloo); start in High School; take kids to work.
- Ability to have discussions, get comments on legislation. Get PEO position; be informed on decisions.
- Working with people, getting sound advice (eg. on policy). Do my job better. Local engagement, meet local businesses (Take MPP to Work).

What do you think the PEO could do better to build relations with MPPs?

Three of the MPPs interviewed could not think of anything that PEO could do better. Others suggested position papers or personal discussions to provide input on key issues, organizing seminars on important topics of public interest, organizing site or project tours, encourage youth and do more on diversity.

Specific comments included:

- Nothing. Have exceptional relationship with all 3 parties. Good approach.
- Non-partisan position papers (eg. Climate Change). Be more educational; fact based.
- Doing a good job. Meet individually once a year. Input on specific issues (eg. asphalt in north; bridge collapse –Nippigon).
- Would welcome opportunity to get engineers view on issues through papers or discussion. Provide tours to sites/ projects.
- Engage MPPs in organized tours (schools, projects) providing examples of what engineers do.
- Doing a good job, staying in touch, but need consistency. Catch public & political interest. Set up "PEO Infrastructure Advisory Group" to conduct lectures, seminars highlighting approaches/ safeguards in the public interest – invite MPPs & media.
- More meetings in ridings. Come to office & talk about issues; offer help.
- Keep doing what they do.
- Could do more on education & diversity. Talk to kids on engineering. Need to be diverse & interact with other groups.
- Do a good job. Need to continuously inform on engineer's role (e.g. Doctors seen as essential to quality of life).

What can PEO learn from the government relations programs of other professional regulators?

Almost half of the MPPs interviewed felt that PEO's government relations were already strong. Other associations mentioned as having good programs were nurses, doctors, teachers, fire fighters, financial planners and PEGO. Areas for improvement mentioned were position papers, mentoring, diversity and accepting government decisions. One MPP was confused between PEO and OSPE. Comments included:

- PEO better than average; have one of the best.

- No clear pattern from others. PEO strong, non-partisan.
- Confused between OSPE & PEO. OSPE produces good position papers – Wind Energy paper excellent.
- Others could learn from PEO. PEO can help with knowledge of MPPs; provide broad perspective.
- PEO one of the more visible (top 3 or 4). Nurses, doctors prominent, but tend to be adversarial (government is their employer). Financial Planners also quite visible.
- Should meet with medical, nursing, teachers and find out how they do it. PEGO also very good (all politicians know about them).
- Fire Fighters excellent, well organized, come to events, do more at local level.
- Should realize government decisions aren't personal (balance/ trade-offs in public interest); move on.
- Engineers could learn re mentoring, diversity, gender parity (male domination). Work with multiple ministries.
- Not a lot. Don't need more interaction. Balanced, effective. Promote value of engineers to Ontarians.

Have you any other thoughts that would be beneficial to PEO in supporting your work as a provincial legislator?

Almost all of the MPPs interviewed offered suggestions in response to this question, sometimes repeating or reinforcing earlier comments. Providing position papers, advice and solutions to help resolve important issues were often mentioned along with comments on the types of events they enjoy such as tours and take your MPP to work or participation in educational events. Specific comments included:

- Values the opportunity to appear at education forums. Good balance in participation with other local MPPs . Appreciates take MPP to work event & annual meeting with GLP chair.
- Engineers' role not well understood. Engineering component to all legislation. Should apply engineering lens to all legislation (would strengthen). Would like to hear more on Climate Change, GHG & related targets (facts). On Industrial exception, PEO should look at why it is not happening; what are barriers.
- Ring of Fire input/ position as a profession. Paper on infrastructure from proper engineering perspective. Recruiting – doing good job attracting females, but need more mining engineers in north. Tours of northern mines (eg. Tembec \$310M investment). Enjoy business & social functions.
- Identify trade-offs & other considerations in legislation. Balanced briefing notes from engineering perspective. Help MPPs know what is important.
- Generally positive. Should promote role in building things, public safety. Offer public tours, participate in events like 'Toronto Doors Open'.
- Come with positive solutions, not just problems; offer help.
- Priority to increase pipeline of young engineers. Advise us on how to encourage young people to pursue engineering careers. Helps to have H Brown advocating for engineers.
- Work with Dept. of Education, kids at risk, start early. Mentoring diverse communities, support for females; have a proactive position on "gender parity". Lead by example.
- Don't contact MPPs just for problems, have an on-going contact/ relationship.
- Help to build connection with local Chapter. Get to know engineers in riding.

Findings:

MPPs interviewed have a positive view of PEO.

They see benefits in their relationship with PEO and its members – access to knowledge, advice on issues.

They had some suggestions to build better relations with MPPs - position papers on key issues, seminars on important topics, site or project tours, encouraging youth and doing more on diversity.

Compared to other professions, PEO is seen as very strong, but could look at or talk with nurses, doctors, teachers, fire fighters, financial planners and PEGO.

Recommendations:

29. In setting GLP priorities and designing activities, GLC and Chapter GLP Chairs should consider the benefits MPPs perceive in the relationship with PEO such as access to knowledge and advice on issues. They should also consider the specific suggestions for activities such as seminars on important topics, site tours, encouraging youth and doing more on diversity.
30. Some suggestions made by MPPs may apply more to OSPE (e.g. position papers on issues on the government agenda) and these suggestions should be raised with OSPE and coordinated action taken to best utilize these position papers.
31. Follow up should be done with the professional organizations suggested to determine if they have any best practice that PEO could implement.

Additional Suggestions:

During the interviews with Councillors, GLC members, Chapter GLP Chairs, MPPs and OSPE representatives, most offered some specific suggestions for improving the GLP or the relationships that the GLP is seeking to establish. These suggestions are listed in Appendix V with a brief summary at the end for each group of interviewees.

The suggestions covered a broad range of topics including:

- Scope of the program
- Management issues
- GLP budget
- Means and frequency of communication within PEO
- GLC structure and operation
- Direction and support from GLC and HQ
- Consistent messages to MPPs
- Training and conferences
- Activities and events
- Chapter GLP organization and support
- Co-operation with OSPE.

Many of the suggestions have been captured in the recommendations made in this report. Other suggestions are quite specific and could be incorporated in the implementation of the more general recommendations.

Implementation of Recommendations:

The audit findings and recommendations are the result of extensive input from Council, GLC, Chapter GLP Chairs, the Manager, GLP and the communications consultant. While Council would make decisions on the recommendations and should approve an implementation plan, GLC and Chapter GLP Chairs should provide feedback before final decisions are taken.

As the oversight body for the program, the GLC should coordinate preparation of an implementation plan and advise Council on priorities for implementation. This planning should include input from Chapter GLP Chairs.

Some of the recommendations will require more direct attention by Council, while others could be delegated to the GLC. For example, the recommendations dealing with “Achieving GLP Objectives” and “Reporting” require Council attention; those related to “Training” and the “GLP Weekly Newsletter” could be delegated to the GLC.

Some recommendations will have budget implications and these need to be assessed and the necessary funds approved with the implementation plan.

Sequencing and timing will need to be coordinated and this could be done by the GLC with support from PEO staff as part of the implementation plan.

To maintain momentum and help ensure timely implementation, some temporary support or consulting resource should be retained to develop details of an implementation plan and to provide advice on the details of some recommendations.

Recommendations:

32. Council should request that the GLC develop a plan that would set out priorities, activities, responsibilities, timeframes and resource requirements to implement the recommendations accepted in principle by Council. The plan should be developed in consultation with Chapter GLP Chairs and other stakeholders.
33. Council should allocate a budget of \$15,000 for additional resources to support the GLC in preparing the implementation plan.

Conclusion:

This study demonstrates that implementation of the Government Liaison Program over the past 10 years has had a very positive effect on Ontario MPPs and raised their awareness of PEO. Good relationships have been established with a number of MPPs. However, PEO’s regulatory mandate is not well understood. The study has also identified many opportunities for improvement which will lead to better alignment of results expectations, a more strategic, focused approach and stronger Chapter

participation. It is hoped that the specific recommendations will help enhance the delivery and eventual results achieved by the Government Liaison Program.

Acknowledgements:

This review would not have been possible without the valuable input of the Councillors, members of the Government Liaison Committee, Chapter GLP Chairs, Members of Provincial Parliament and staff of OSPE who participated in the over 70 interviews. The individuals interviewed are listed in Appendix IV and I thank them for their time and insight.

Special thanks to Gerard McDonald and Scott Clark for their guidance on planning the project and feedback during execution, Jeannette Chau for sharing her experience and assisting with access to the many documents reviewed and Howard Brown, President, Brown and Cohen Communications and Public Affairs Inc., for sharing his knowledge, experience and contacts particularly in arranging interviews with MPPs.

Appendices:

- VII. Audit Design
- VIII. Audit Criteria
- IX. Interview Guides
- X. List of Interviewees
- XI. Additional Suggestions
- XII. Reference Documents

Appendix I

Government Liaison Program (GLP)

June 19, 2016

Audit Design:

Purpose:

This audit design document summarizes the research done to compile the proposed audit criteria, the recommended criteria to be tested, the approach to be used (interview, questionnaire, data analysis), any options (e.g. sample sizes), the proposed work plan to complete the project and a communications plan to set out what messages and how these will be communicated to all participants in the audit and to the appropriate stakeholders.

Research:

In order to identify the audit criteria, a number of relevant documents were examined. These included the Government Liaison Committee Terms of Reference, PEO Council and Executive Committee motions, minutes and agenda documents pertaining to the GLP, the GLP Chapter Manual, GLP work plan and the RFP for the GLP audit. The key questions that the audit should answer are:

- Is the Program working as intended?
- Is it achieving the desired results?

The Committee Terms of Reference and Chapter Manual are quite comprehensive and provide a number of measures to test whether the Program and particularly the Chapter implementation, is working as intended. The stated goals and expectations from the Council and Executive Committee minutes and motions indicate the intended results although these will be more difficult to measure objectively.

Recommended Criteria:

The suggested audit criteria are documented in the chart attached along with suggested test methods. These would include interviews, questionnaires and several other instruments. In some cases a survey may be appropriate; however, this would be beyond the scope of the current project. A combination of test methods or data collection approaches may be appropriate for certain criteria (see chart). The audit criteria will be confirmed with the PEO Project Authority before finalizing the audit instruments.

Interviews:

The RFP for the Audit identified for main groups for interviews – GLC members, Councillors, Chapter GLP Chairs and PEO staff – as well as the PEO's government relations consultant. Each group will bring a different perspective to the audit. In addition, it is recommended that a sample of MPPs, their staff or other stakeholders be interviewed to help assess the impact of the GLP. The audit plan provides for

about 75 – 80 interviews of about 30 minutes each. The structure would be a short introduction of 2-3 minutes, specific questions to be covered in about 20 minutes and 3-5 minutes for other comments or discussion. The list of interviewees with contact details will be provided by the PEO Project Authority. Sample interview guides and questions are attached (to follow).

Questionnaire:

Most of the factual information and statistics from the Chapters can be gathered using a questionnaire or data request. Specific items that could be gathered this way are flagged in the draft audit criteria chart attached. In some cases the information may be available from existing sources and this will need to be confirmed before finalizing the questionnaire/ data request. A sample questionnaire is attached (to follow).

Other Data Collection Methods:

To the extent possible, existing records (minutes of meetings, work plans, reports) will be used to supplement the interviews and questionnaire. These sources will be confirmed with the Project Authority.

Project Work Plan:

The details of the work plan are similar to those provided in the response to the RFP (see attached). The key target dates are:

- Complete draft audit design & work plan - June 20
- Finalize interviewee list & send email - June 23
- Start Interviews - June 27
- Complete most interviews (90%) - July 12
- Complete audit phase - July 18
- Complete analysis phase - August 22
- Circulate draft recommendations - August 23
- Complete final report - August 29

Communications Plan:

All introductory communication will be coordinated through the Project Authority. Messages will include the purpose of the audit, the general approach stressing the broad range of input/ consultation, the confidentiality of individual interviews and how the results will be reported.

Appendix II

PEO Government Liaison Program

Audit Criteria

Program

Objectives Met?

- Government continues to recognize PEO's regulatory mandate
- No government incursions in self-regulation of the profession
- No erosion of engineering as self-regulating profession
- Raise PEO profile at Queen's Park
- Educate legislators on PEO's role, issues & its value

Government Liaison Committee

- Oversee integration of GLP into each Chapter
- Training Sessions

Chapter Committees

Fulfilling Responsibilities

- Coordination (critical function)
- Recruitment of members to participate
- Reporting (key function)
- Liaison
 - With Government Liaison Committee
 - With communications consultant
 - With Program Manager
- Events
 - PEO hosted Events
 - Attending Events with MPPs

Appendix III

Interview Guides

A - Interview Guide Members of Council:

Purpose: From the statement of work, these interviews are intended to confirm Council members expectations and observations concerning the GLP and GLC. The interviews should assist in determining how the program is working, the results being achieved and any suggestions for improvement.

Interview Structure:

The structure will be a short introduction of 2-3 minutes, specific questions to be covered in about 20 minutes and 3-5 minutes for other comments or discussion.

Questions:

What results do you expect from the Government Liaison Program?

Are you aware of examples illustrating that these results are being achieved?

Based on your experience and observations, do you believe that the provincial government (MPPs, Cabinet, senior public servants) recognizes PEO's regulatory mandate?

Since the GLP was initiated (in 2005), do you believe that:

- The profile of PEO at Queen's Park has increased?
- Legislators are better educated on PEO's role, issues and value?
- There have been no government incursions in self-regulation of the profession?
- There has been no erosion of engineering as a self-regulating profession?

Concerning the Government Liaison Committee:

- What results do you expect from the Government Liaison Committee?
- Has the Committee been successful in ensuring that the GLP has been integrated into each Chapter?
- Is training for PEO participants/ representatives sufficient?
- Is the information (e.g. plans, reports) provided to Council sufficient?

Have you participated in events organized to engage MPPs or other government officials and were these effective?

Do you have any specific suggestions that would improve the GLP or GLC?

B - Interview Guide - Members of GLC:

Purpose: From the statement of work, these interviews are intended to address the work that the GLC undertakes, the structure of the GLC and the work of the GLP. The interviews should assist in determining how the program is working, the results being achieved and any suggestions for improvement.

Interview Structure:

The structure will be a short introduction of 2-3 minutes, specific questions to be covered in about 20 minutes and 3-5 minutes for other comments or discussion.

Questions:

What results do you expect from the Government Liaison Program?

Are you aware of examples illustrating that these results are being achieved?

Based on your experience and observations, do you believe that the provincial government (MPPs, Cabinet, senior public servants) recognizes PEO's regulatory mandate?

Since the GLP was initiated (in 2005), do you believe that:

- The profile of PEO at Queen's Park has increased?
- Legislators are better educated on PEO's role, issues and value?

Concerning the Government Liaison Committee:

- What results do you expect from the Government Liaison Committee?
- Has the Committee been successful in ensuring that the GLP has been integrated into each Chapter?
- Is the recruitment of members to participate in the program effective?
- Is training for PEO participants/ representatives sufficient?
- Is the information (e.g. plans, reports) provided by Chapters sufficient?
- How does the GLP Weekly newsletter contribute to the work of the Committee?
- Is there adequate liaison with GLP Chairs?

Have you participated in events organized to engage MPPs or other government officials and were these effective?

Do you have any specific suggestions that would improve the GLP or GLC?

C - Interview Guide – GLP Chairs:

Purpose: From the statement of work, these interviews are intended to address the work that the GLP Chairs undertake, the structure of the GLP within the Chapter and the local work of the GLP. The interviews should assist in determining how the program is working, the results being achieved and any suggestions for improvement.

Interview Structure:

The structure will be a short introduction of 2-3 minutes, specific questions to be covered in about 20 minutes and 3-5 minutes for other comments or discussion.

Questions:

What results do you expect from the Government Liaison Program?

Are you aware of examples illustrating that these results are being achieved?

Based on your experience and observations, do you believe that the provincial government (MPPs, Cabinet, senior public servants) recognizes PEO's regulatory mandate?

Since the GLP was initiated (in 2005), do you believe that:

- The profile of PEO at Queen's Park has increased?
- Legislators are better educated on PEO's role, issues and value?

Concerning the Chapter Government Liaison Program:

- What are the main activities undertaken to implement the GLP for your Chapter?
- How would you describe the structure of the GLP in your Chapter?
- What results do you expect from your Government Liaison Program?
- Is the recruitment of members to participate in the program effective?
- Is training for PEO participants/ representatives sufficient?
- What management processes are in place to help ensure coordination of GLP activities?
- How does the GLP Weekly newsletter contribute to the Program?
- Is there adequate liaison with the central Government Liaison Committee, the communications consultant and the Manager GLP?

Have you participated in events organized to engage MPPs or other government officials and were these effective?

Do you have any specific suggestions that would improve the GLP, GLC or your Chapter GLP activities?

D - Questions for MPPs:

1. Are you familiar with the Professional Engineers Ontario (PEO) and if so, what do you understand to be their mandate?
2. Have you participated in any events organized by PEO? If so, what were the events and did they assist you in understanding the role of PEO and the value of the engineering profession in Ontario?
3. *Are you familiar with any issues or policies that PEO is promoting and if so what are these and do you support the PEO position?*
4. What do you think the PEO does well in its interactions with members of the provincial legislature?
5. *What benefits do you see in your relationship with PEO as an organization and with its members?*
6. What do you think the PEO could do better to build relations with MPPs.
7. What can PEO learn from the government relations programs of other professional regulators'?
8. Have you any other thoughts that would be beneficial to PEO in supporting your work as a provincial legislator?

Appendix IV

List of Interviewees:

Councillors:

George Comrie, P.Eng., CMC

Thomas Chong, P.Eng.

David W. Brown, P.Eng.

Christian Bellini, P.Eng.

Roydon A. Fraser, P.Eng.

Roger Jones, P.Eng.

Dan Preley, P.Eng.

Changiz Sadr, P.Eng.

Noubar Takessian, P.Eng.

Guy Boone, P.Eng.

Warren Turnbull, P.Eng.

Gary O. Houghton, P.Eng.

Ewald Kuczera, P.Eng.

Tim F. Kirkby, P.Eng.

Ishwar Bhatia, M.Eng, P.Eng.

Santosh K. Gupta, P.Eng.

Mary Long-Irwin, LGA

Rakesh Shreewastav, P.Eng.

Marilyn Spink, P.Eng.

GLC Members:

Darla Campbell, P.Eng

Gabe Tse, P.Eng

Michael Chan, P.Eng

Bill Allison, P.Eng

Ishwar Bhatia, P.Eng

Daniel King, EIT
Jonathan Hack, P.Eng
Angel Serah
Rakesh Shreewastav, P.Eng
Warren Turnbull, P.Eng
Jeannette Chau, P.Eng
Howard Brown, President, Brown and Cohen

Chapter GLP Chairs:

Marc Pilon
Pankaj Panchal
Ravinder Panesar
Haris Ahmadzai
Harneet Panesar
Arjan Arenja
Gabe Tse
Hafiz Bashir
Steve Favell
Raymonf Chokelal
Amalia Rey-McIntyre
Tomiwa Olukiyesi
Andrew Van Dyk
John Severino
Jeffrey Lee
Sawsan Abdul-Majid
Dan Demers
Tony Linton
Narayana Asogan
Ray Linseman
Manoj Shukla
Fred Saghezchi
Asif Khan
Daniel Liao

MPPs:

Minister Brad Duguid, MPP (Scarborough Centre)

Minister Eleanor McMahon, MPP (Burlington)

Minister David Zimmer, MPP (Willowdale)

Yvan Baker, MPP (Etobicoke Centre)

Steve Clark, MPP (Leeds-Grenville)

Vic Fedeli, MPP (Nipissing)

Catherine Fife, MPP (Kitchener-Waterloo)

Sylvia Jones, MPP (Dufferin-Caledon)

Peter Milczyn, MPP (Etobicoke-Lakeshore)

Julia Munro, MPP (York-Simcoe)

Soo Wong, MPP (Scarborough-Agincourt)

OSPE Staff

Catrina Kronfli

Lee Weissling

Appendix V

Additional Suggestions:

During the interviews with Councillors, GLC members, Chapter GLP Chairs, MPPs and OSPE representatives, most offered some specific suggestions for improving the GLP or the relationships that the GLP is seeking to establish. These suggestions are listed below with a brief summary at the end for each group of interviewees. Many of the suggestions have been captured in the recommendations made in this report. Other suggestions are quite specific and could be incorporated in the implementation of the more general recommendations.

Council:

- Need to improve influence of program; develop strong on-going relationships
- Chapter budgets too low compared to other programs; should we lobby government more?
- After election engage new people on issues important to PEO with consistent message and regular follow up. GLC flow of info between Council & Committee. Important to have Committee updates Some Councillors don't fully understand. May need more time on Council agenda. GLC high priority & doing a good job.
- Process is important, but need preparation & accountability. Challenge members to meet MPPs at functions. Give them "sound bites" to use. Tell people what not to do. Avoid different messages (coordinate). Interview MPPs. Talk to OSPE CEO – does excellent work on consultation & white papers.
- More communication/ reporting on what is happening. Need to have clear "ask" when attending fund raisers (not much value). Review budget (\$) distribution by # of seats. Engineers just want good government and want government to listen to people who know. (eg. Green Energy – government ignored engineers).
- Focus on Prov., why not other levels (MPs, Municipal, quasi government agencies). Not comfortable with political involvement – PEO should not fund campaigns to get MPPs elected. J. Chau very busy, needs GLP focus.
- Potential for info on web site. Need more lead time, organized info on issues to cover. Be proactive on issues. Look at other organizations. Blog to share info with other professional organizations. Quarterly continuous feedback (survey). Key questions to survey regularly.
- Spend \$ on educating the public. Combine GLP with OSPE. New consultant (same old approach). Diversify audience (public, opposition as well as ruling party).
- World changing so need to monitor and adapt priorities. Feature engineering successes (newsletter). Empower all engineers to showcase what they do.
- Work with all levels of government & our partners (Eng. Canada). Stronger together GLC/ PAN (QPD). Joint meetings with MPPs – OSPE/PEO.

- Convenient communication (eg. video conference); volunteers have less time. Same (Council endorsed) messages from all Chapters to MPPs. Grass roots support has best probability for success (more weight from local constituents one on one).
- GLC needs to develop 1 message, get Council's blessing, transmit to Chapters & get all Chapters to use same message.
- Consistent, easily accessible, strong messaging with long term impact (eg. tag line). At Chapters still looking for messages. Use stats to assess impact of Bills.
- Strategize on important issues. Mobilize all Chapters on important issues (rallies, demonstrations). Contact constituency offices. Support PEO members to get elected. See GLP as a shared responsibility.
- Keep at it. Look for opportunities. Keep MPPs engaged. Need consistent message overtime.
- Engage Chapters more – help them be consistent in messaging, but don't micro-manage. Brown very effective, worth \$. Economic Political Action Committee (V Fedeli) good model.

Findings:

Budget for GLP – review amount (may be too low) and distribution by “seat”. Adjust for changes in provincial rules for fund raising activity. Budget funds for educating the public.

GLC Communication with Council – important to have updates for Council; more time on Council agenda.

Consistent Messages to MPPs – Need clear consistent message over time, avoid different messages. Should consider developing a “tagline” and “sound bites” for Chapters to use. GLC needs to develop 1 message, get Council's blessing, transmit to Chapters & get all Chapters to use the same message when communicating with MPPs. Engage Chapters more to help them be consistent in messaging.

Use convenient means of communication – video conferencing, information on the web site, blogs – since volunteers have little time.

Management of Issues – Strategize on important issues. Mobilize all Chapters on important issues. Be proactive on issues and provide more lead time and organized information on issues.

Broaden Scope – Include other levels of government (MPs, municipal, quasi-government agencies) and the public. Work with all levels of government and our partners (Engineers Canada, OSPE/ PAN). Support PEO members to get elected.

GLC:

- Get outside people on Committee (affiliated but not active in other committees); new ideas. GLC quite effective, sees value. H. Brown very good resource.
- “Government Liaison” term misleading. Could be interpreted as excluding opposition parties. May leave wrong first impression. GLP evolving (continuous improvement). Need more traction in Council.

- Have work plan, follow plan; discuss at every GLC meeting. Chapters invite MPPs to events, attend MPPs events. Understand issues important to MPPs. Be friends with MPPs.
- Recruit allies. More formal mechanism for feedback from Chapters (photo ops not enough). More unified voice (with OSPE) when speaking with government.
- All members of GLC need to attend (no quorum can't vote).
- Need to focus on core (3-5) issues & PEO position. How to communicate these. Provide updates on key issues. Consider Balanced Scorecard approach; measure where MPPs are on scale.
- Should match a PEO person from their riding to each MPP and choose by interview. GLC more advisory than decision making. Good diversity.
- Higher visibility on Council for GLP. Integrate the Registrar in GLP. Celebrate engineering successes. Get engineers elected (none in caucus now). Have publications sent to MPPs – Engineering Dimensions (100k circulation). Go to MPP fund raisers.

Findings:

GLC Structure & Operation – Get outside people on Committee to generate new ideas. Have a work plan and follow it. All members of GLC need to attend (need quorum). Focus on core issues (3-5) and PEO position, provide updates on key issues. Should clarify advisory vs. decision making role. Consider balanced scorecard approach and measure where MPPs are on a scale. Have a formal mechanism for feedback from Chapters. Need more traction in Council.

GLP – “Government Liaison” terminology may be misleading and could be interpreted as excluding opposition parties. Should understand issues important to MPPs. Should match a PEO person to each MPP. Go to MPP fund raisers. Send publications to MPPs. Recruit allies and have a more unified voice, with OSPE, when speaking with government. Get engineers elected. Celebrate engineering successes.

Chapter GLP Chairs:

- More structured stats MPPs in region. Need sufficient notice for invitations.
- Attract more volunteers. Some Chapters slow – need to work on this. Get all Chapters on same page.
- Only once a year meeting; need more sessions (workshops). Not enough time to address Chapter/ regional/ issues (eg. how to handle first meetings with MPPs).
- Direction setting, focus, priorities, purpose. Building relationships to what end? (Depends on person & background).
- Add email from GLC on activities. GLC/ Manager follow up, motivate, remind. Engage from top. Help with take MPP to work. Clear role – advocacy vs regulatory.
- No, still new. Chapter low key (3 events keep us busy). Engineering Challenge Day very popular; 100 students.

- Make sure all info disseminated (eg. manual). Need more substance/ research (Ind. Exception). Address safety in other disciplines (not just civil). Don't know what GLC doing (research?) Use Google docs spreadsheets to seek views.
- Relationship building key. Seek to understand MPP needs.
- Education – eg. Engineering Month. Higher priority top down from HQ – no feedback/ push for 3 years when nothing done.
- Follow OSPE approach. Promote profession to media (# of voters). Be more vocal (advertise).
- Need direction, overall objective; preparation info. Coordination – regular meetings (4tly conference calls).
- More clarity on direction. Tips on best activities to get most value from engagement. Carefully target letters to all MPPs. Need to reinvent GLP & Newsletter (more impact, interviews, more depth, educate PEO on government).
- Need to depend on individual PEO members to be effective.
- Not yet. Attended PEO conferences, but program hard to apply to Chapter.
- Strong position papers (Engg overall not just PEO). Need unbiased, balanced position papers Clear OSPE/ PEO relationship and impact/ strategy. More Chapter interaction; share MPP meetings. MPPs want info.
- More opportunity for participation in MPP fund raisers. (Sending HQ or Chapter. Would like at least one from Chapter. \$ now a constraint.) Have 5 ridings, with 4 of 5 participating.
- More training, more connection, more help for those seeking office. Keep expectations clear & reasonable.
- If PEO planning to communicate with government or have an event, should invite GLP Chairs (5-10). All GLP Chairs should meet with Council before deciding on my report recommendations. Need follow up & action on report, figure out what to do in future including budget.
- Coordinate training earlier after election (May rather than April). Need process for hand over from out-going Chair including intro to MPP. Should be 2 or 3 year term.
- Time is issue for volunteers. Guidance, standards for Chapters (eg. substance of Questionnaire).
- Clear message to go to MPPs (4tly or annually). Packages to hand out (eg. to new MPPs) – one standard; one with current message/ issues. Showcase best events/ practices. Joint Chapter/ regional events when feasible.
- Reach out to municipalities (Mayors/ Reeves). Invite to Academy. More funding for activity at local level. PEO directory for public. Keep GLP & expand.

Questionnaire:

- GLP management tools, templates, guidelines, recommended practices. GLP academy training for more than one person on the chapter committee. With regard to the Industrial Exception issue, research to show statistics demonstrating how much an issue industrial accidents are without the oversight of a P.Eng. Without the stats, the case for the Industrial Exception is weak.
- We need training and a plan similar to what our OSPE Counterparts have. It may be useful to request attendance of PAN members to develop a template.

- To provide a quarterly update in a clear and consolidated fashion on what messages the PEO or HQ would like to present to politicians. Currently, it is bit and pieces, are embedded in GLP Weekly, Dimension Magazine, update from other EB members, etc. A resource place that showcases other GLP successful activities, such as, Grand River Chapter's and York Chapter's works. When feasible/beneficial or making sense, to encourage joint Chapter GLP activities, so that the activities can be enriched and be more diverse, not to mention strengthening connections.

Findings:

Direction & Support from GLC/ HQ – Need clear direction, overall objective, priorities top down from HQ. Need clear, reasonable expectations. Get all Chapters on same page. Guidance, management tools, templates, recommended practices, standards for Chapters. Clear message to go to MPPs (updated regularly). Carefully target letters to all MPPs. Provide packages to hand out (e.g. to new MPPs) – one standard; one with current message/ issues. Need to reinvent Newsletter – more impact, interviews, more depth, educate PEO on government. Provide more structured stats for MPPs in region; need more substance, research. GLC/ Manager should follow up, motivate, remind; provide help with take MPP to work events. Make sure all information is disseminated (e.g. manual). Use “googledocs” spreadsheets to seek views. Should have a PEO directory for the public.

Training/ conferences – Need more sessions (work shops) to allow more time to address Chapter/ regional issues. Tips on best activities for MPP engagement. More training, more connection, more help for those seeking office. Coordinate training earlier after Chapter elections. Training for more than one person on Chapter committee. Learn from OSPE approach and involve PAN members.

Activities/ events – More opportunity for participation in MPP fund raisers; at least one from Chapter to attend. More funding for activity at the local level. Joint Chapter / regional events where feasible. If PEO planning to communicate with the government or have an event, should invite GLP Chairs. Send email from GLC on upcoming activities. Need sufficient notice for invitations to meetings. Reach out to municipalities. A resource (web site?) that would showcase best events/ practices.

Chapter Organization/ Support – Need to attract more volunteers. Need to depend on individual PEO members to be effective. Need more Chapter interaction, share MPP meetings. Need a process for hand over from out-going Chair, including introduction to MPP. Should have 2 or 3 year term for Chair.

Co-operation with OSPE – Need clear OSPE/ PEO relationship with coordinated strategy and impact. Need strong, unbiased, balanced position papers. Should follow (support) OSPE approach, promote the profession to the media, be more vocal, advertise.

General – Relationship building is key; seek to understand MPPs' needs. All GLP Chairs should meet with Council before deciding on GLP Audit report recommendations. Need follow up and action on this report; need to figure out what to do in the future including budget.

MPPs:

- Values the opportunity to appear at education forums. Good balance in participation (with McDonnell, MacLaren). Appreciates take MPP to work event & annual meeting with GLP chair.
- Engineers' role not well understood. Engineering component to all legislation. Should apply engineering lens to all legislation (would strengthen). Would like to hear more on Climate Change, GHG & related targets (facts). OSPE package -55 pages too long. On Industrial exception, PEO should look at why it is not happening; what are barriers.
- Ring of Fire input/ position as a profession. Paper on infrastructure from proper engineering perspective. Recruiting – doing good job attracting females, but need more mining engineers in north. Tours of northern mines (eg. Tembec \$310M investment). Enjoy business & social functions.
- Identify trade-offs & other considerations in legislation. (Balanced briefing notes from engineering perspective.) Help MPPs know what is important.
- Generally positive. Should promote role in building things, public safety. Offer public tours, participate in events like 'Toronto Doors Open'.
- Come with positive solutions, not just problems; offer help.
- Priority to increase pipeline of young engineers. Advise us on how to encourage young people to pursue engineering careers. Helps to have H Brown advocating for engineers.
- Work with Dept. of Education, kids at risk, start early. Mentoring diverse communities, support for females; have a proactive position on "gender parity". Lead by example.
- Don't contact MPPs just for problems, have an on-going contact/ relationship.
- Help to build connection with local Chapter. Get to know engineers in riding.

Findings:

Almost all of the MPPs interviewed offered suggestions in response to this question, sometimes repeating or reinforcing earlier comments. Providing position papers, advice and solutions to help resolve important issues were often mentioned along with comments on the types of events they enjoy such as tours and take your MPP to work or participation in educational events.

OSPE:

Based on two interviews, several suggestions were made:

- Invite OSPE to more meetings. Share packages used for preparation of volunteers. Learn more about each other – develop knowledge & understanding. GLP participants should be aware of OSPE.
- Better communication/ information sharing most important. Arrange for OSPE staff to attend GLP meetings or training and to meet with GLP staff and Chairs.
- Use volunteer feedback form for meetings to cover follow up (eg. with another dept.) and to comment on process. Before meetings volunteers are trained/ briefed on phone including expected results.

- Still need to clarify PEO/ OSPE roles, although better knowledge by MPPs now. Always request meeting summaries (asks, outcomes) which could be compiled on a members only web site.
- Involve OSPE more in GLP activities/ meetings. Have more joint activities/ meetings. Strengthen communication. Need clearer understanding by PEO Chapters of OSPE role and advocacy issues.
- Would like to see GLP and PEO Chapters becoming OSPE members and would like to see this emphasized by Chapter Chairs.

Findings:

OSPE contacts wanted better communication, information sharing, joint participation in activities and mutual understanding with PEO. OSPE approach for meetings with MPPs (preparation and documentation/ reporting) may be useful for PEO. There may be an opportunity for joint PEO/ OSPE memberships.

Appendix VI

Reference Documents:

PEO Council Minutes/ Motions

PEO Executive Committee Minutes/ Motions

GLC Terms of Reference

GLC Work Plan

GLP Budgets/ Actual Expenditures (2013 – 2015)

2015 GLP Chapter Manual

GLP Weekly Newsletters

GLP Information Notes

RFP for GLP Audit May 13, 2016

GLP Section of Annual Report (2013 – 2015)

Extract from 2015 Questions and Answers on PEO Operations

GLP Report 2005-2016 by Brown and Cohen

PEO Policy Documents

Job Description – Manager GLP