



the
**communications
department**

**Communications Audit Report
Professional Engineers Ontario (PEO)
June 2015**

the **Communications Department**

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PROFESSIONAL ENGINEERS ONTARIO (PEO) COMMUNICATIONS AUDIT – JUNE 2015

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Executive Summary

In April 2015, the Communications Department was engaged to perform a communications audit for PEO. The audit examined the existing communications practices and products of the organization through a combination of personal interviews with staff and volunteers and a review of the collaterals produced by PEO.

By examining “how” PEO communicates, we attempted to answer the five Ws: who, what, where, when and why of PEO’s existing practices and products. Based on our research, we identified the [strengths](#), [weaknesses](#), [opportunities](#) and [threats](#) (SWOT) of the existing communications practices.

Overall, we found that PEO communications are solid and consistent with a professional organization. We believe there are opportunities for improvement and have made recommendations that would enable PEO to achieve the goals stated in the Strategic Plan. In summary, our recommendations are:

- [Know your audiences.](#) Develop a member database that will enable targeted communications to/with specific members/groups of members.
- [Tailor your messages.](#) Ensure messages clearly state PEO’s mission and differentiate it from OSPE.
- [Measure your impact not your outputs.](#) Set measures in advance of beginning work that focus on the desired outcome versus measures of productivity or outputs.
- [Find your voice.](#) Be consistent in all communications with language and tone.
- [Differentiate PEO and OSPE, Regulatory and liaison roles.](#)
- [Critically evaluate your communications products](#) for their relevance, timeliness and impact.
- [Take advantage of the skills of the Communications Team.](#) PEO has a highly skilled team that is well-positioned to support the Strategic Plan with its communications expertise.
- [Leverage Chapters as messengers.](#) Chapters are the touchpoint for most members. Chapters can amplify and support PEO’s communications efforts and generate support for initiatives.

We are grateful for the openness and generosity of those we interviewed to share their expertise and suggestions with us. We believe this report reflects their input.

Introduction

In April, 2015, **the Communications Department** was engaged by Professional Engineers Ontario (PEO) to conduct a Communications Audit.

Our audit reviewed the existing communication practices and products of the organization. This involved reviewing hard and soft copies of various communication plans, studies and reports plus materials developed by PEO's Communications Team as well as 31 interviews with staff and members, including Council members and Chapter executives. Based on these data we developed a Strengths/Weaknesses/Opportunities/Threats analysis of PEO's communications.

Strategic communication is driven by and should be measured by its ability to support the mission, vision and business plan (or in this case, the Strategic Plan) of PEO. By examining "how" PEO communicates, our audit attempts to answer the five Ws: who, what, where, when and why of PEO's existing practices and products.

Based on our research and analysis, we have provided a number of recommendations for PEO communication, that going forward, should support the Strategic Plan.

SWOT Analysis

Based on our examination of PEO communication materials and processes and our interviews with staff and members, we analyzed the Strengths, Weaknesses, Threats and Opportunities for PEO communication.

Strengths

PEO has a number of very positive attributes related to its communication efforts. It has a strong base from which to build.

- PEO staff is aligned to specific functions involving communication with members, e.g. EITs, Chapters, discipline, etc.
- C. Mucklestone is part of the senior leadership team and represents Communications at the table.
- *Engineering Dimensions* is recognized as the official PEO publication.
- Chapters use PEO visual identity and templates for their communication.
- Chapters are very active with the members.
- Chapter communication is pro-active and includes lots of interaction; M. Ng's role as conduit/ liaison is important and appreciated by Chapter executives.
- Regional Congresses are a valued opportunity to share information.
- The GLP program is well-established and mature.
- Programs to support those pursuing licensing exist.
- PEO is active in the educational system at all levels.
- Volunteer base is active and wants to contribute.

- The implementation of the new tool for eblast distribution (Campaigner) should go a long way in facilitating communication, particularly at the chapter level.
- Communication plans are developed for new initiatives and important issues.
- Comprehensive communication policies are developed and in place, e.g. social media.
- There is interest in more positive news, milestones, successes of PEO and engineers.
- Weekly update from Registrar to Council and senior management is well received; keeps senior team current. Town Hall meetings with staff provide updates on Council and significant events. “FRED” staff newsletter also keeps staff updated/engaged.
- Engineering Month has an established track record of promoting the profession.
- Advertising supports the key messages of PEO (role and responsibility).

Weaknesses

We also identified a number of weaknesses in PEO’s current communications. These weaknesses may be impairing PEO’s ability to communicate effectively or efficiently with its stakeholders.

- Communication is generally “one-size-fits-all” for the membership; little segmentation of membership.
- Confusion exists as to what PEO does, its objectives and mandates (vs. what OSPE does).
- Evaluation/measurement/results for communication plans are limited.
- Strategic Plan has many objectives and multiple initiatives under each, but no impact measures except for the public confidence score, which sets a baseline for the future.
- No insights into the membership’s usage of various social media platforms.
- Limited advertising to educate members and general public about role of PEO.
- There is limited dialogue between Council and Chapters.
- Chapter executives want to know the “big picture” – want timely and more frequent updates on what is going on at PEO/Council, how it impacts members.
- While Chapters have Regional Congresses, AGM and associated events, and the Chapter Leaders Conference to facilitate sharing of info and best practices between Chapter executives (Chapter Education coordinators also have a conference to share info), there is still a perception by Chapter executives that more sharing would be very useful.
- Website search is not user-friendly or intuitive, making it difficult to find information.
- Communication has a foot in both camps: mail/paper and on-line/digital.
- *Engineering Dimensions* may be viewed as too conservative, not timely.
- Some form letters are not written in plain English and may be confusing to those whose first language is not English. Much of this material is very formal and not reader-friendly and/or engaging.

Threats

Communication threats are issues that have the potential to impact the organization's ability to communicate or to fulfill its mandate. Threats can be operational or rooted in policy.

- PEO is both a regulatory body and a “club”. PEO/Council needs to better define itself for its stakeholders, as well as clarify its role vs. OSPE.
- Because of its dual nature, the PEO message is not articulated and communicated consistently nor is it well-coordinated e.g. President's messages not coordinated with Registrar; staff members from different areas making presentations may not be carrying the same messages.
- The demarcation between OSPE and PEO with respect to government relations and representation/advocacy of the profession remains unclear and messy.
- PEO is missing opportunities to promote and defend the profession by not being loud, timely, clear on matters within its mandate - and/or PEO is not coordinating with OSPE to ensure this happens.
- When issues arise, PEO needs to be the voice of the regulator with stakeholders. Failure to take serious and assertive steps could seriously damage its reputation as a self-regulatory body, e.g. Belanger report.
- Committee volunteers sometimes stall progress of initiatives by being indecisive; staff must then redo work and PEO does not move forward in a timely manner, reflecting poorly on the organization.

Opportunities

Every organization has opportunities which, if seized, can propel their communications to the next level. Based on our research, we believe PEO has a number of promising opportunities.

- Reinforce PEO's vision, mission, goals/objectives in all messaging.
- Clarify/differentiate PEO's role and OSPE's role through consistent messaging.
- Customize/tailor communication to various demographic groups within the membership.
- There are opportunities for “cross-pollination” with other areas of PEO, e.g. Communications, Education, Chapters/volunteers, to develop content and coordinate efforts.
- Develop measures of membership engagement/impact for all communication initiatives.
- Develop communication plans with impact measures. Especially when introducing new initiatives to Chapters, membership, e.g. Campaigner implementation.
- Pro-active communication on key issues: get out ahead of the story to build support, e.g. CPD, Industrial Exemption.
- Leverage existing content across social media and ideally reach and engage a broader audience.
- Work with Chapters, Council/Councillors to be more pro-active in promoting PEO with the membership, and the engineering profession in their communities.

- Continue to leverage the strength of Engineering Month to promote PEO and the profession with stakeholders.

How does PEO communicate?

For the most part, PEO's staff is aligned with specific audiences and has the responsibility of communicating with those audiences. Missing from all communication throughout the organization are measures of the impact the outputs are having on their intended audience, i.e. the outcomes.

The Communications Team specifically has responsibility for website design/content, media relations, social media and the production of PEO's official publications: *Engineering Dimensions* and the PEO annual report. Additionally, the Communications Team supports other departments and staff with graphic design and editing support in the production of their materials on an as-needed basis. And while the Communications Team is a respected resource within the organization, not all communication goes through the department. As a result, there are inconsistencies in messaging, tone and manner.

PEO has a number of communication outputs. Those produced by or overseen by the Communications Team are of a high quality and are worthy of a professional organization.

For the most part, all members get all communication products. While PEO acknowledges that members' interests vary, there currently is little done to match or tailor specific communication materials to a particular member or member group (other than students and EITs). A lack of demographic and practice-specific information about members precludes such customization and impedes PEO's ability to foster greater engagement between members and the organization. It also precludes PEO's ability to measure the effectiveness of communication with subsets of the membership or to survey subsets of the membership on a specific topic.

One characteristic of PEO communication (and operations in general) is the significant influence of volunteer committees. These committees are simultaneously resources for PEO staff and significant bottlenecks for developing communication plans/messages, creating materials and getting them through to completion in a timely manner. The volunteers, particularly those on committees, sometimes direct staff and place themselves in the role of project managers/approvers, which impacts the ability of PEO to move projects forward and be timely, proactive, nimble and responsive.

Who is PEO communicating with?

Our audit identified a number of PEO's stakeholders or audiences. We wanted to understand what each audience preferred in terms of communication, their information needs, attitudes, perceptions and knowledge of PEO.

Engineering Dimensions readership surveys and the 2007 Public Confidence Study provided some insights into the interests and attitudes of PEO members; however, PEO

has not drilled deeper to learn more about the attitudes and opinions of various subsets of its membership.

PEO's stakeholders include its members, potential members, volunteers, staff, government and the general public. What follows is a description of each of these potential audiences and what PEO is currently doing to communicate with each.

PEO members

Based on the resource materials provided and insights shared by PEO staff, Councillors and chapter executives, we understand the PEO membership to be a diverse group with varying degrees of interest in and involvement with the organization. We know that members are scattered throughout the province; they practise in a range of disciplines (e.g. consulting, structural, chemical, mechanical, software, etc.); many are retired; many are just starting their careers; and many no longer practise but value their designation and so maintain their licence.

With its existing tools, PEO is not able to segment its membership to target communication to members or groups with specific expertise/interests. As a result, with the exception of students, those pursuing licensing, or those in the disciplinary process, communicating with members is largely "one-size-fits-all".

While it is important that PEO deliver certain communication to all members in order to fulfill its role as a regulator, certain segments of membership have specific needs for information. For example, one of the actions in the Strategic Plan is, "communicate intent of 2014 changes to the Building Code Act to building officials and monitor compliance" (8.7) and another is "work with various PEO units and external stakeholders to further the aim, expressed in Council position, of introducing professional design coordination into the Ontario Building Code." (10.1). In both these examples, a particular segment of the membership will have a keen interest in the topic and be impacted by the outcomes, while the balance of the membership may only be interested in knowing that PEO is protecting the interests of their fellow members and promoting the profession.

It also appears that members continue to be unclear about the role of PEO as a regulator vs. the role of OSPE. They are unsure as to which organization has responsibility for building and upholding the reputation of engineers and advocating for the profession. This is understandable given that a number of PEO's initiatives are about reputation (e.g. Engineering Month) and advocacy.

PEO potential members

This group can be divided into two groups: those who are pursuing licences, e.g. graduates of engineering schools, qualified professionals from other countries, EITs, and students at all levels in the education system.

For those pursuing licensing, there are programs and supports for their progress throughout the process. However, licensure is likely the least understood process among existing members, particularly at the chapter level, and these are the professionals to whom those pursuing licensing appeal when the process is not clear.

Engineering students in recognized universities and colleges receive information from PEO about licensing through Engineering Societies and through the Student Membership Program (SMP). These students are the future of the profession. They need to be convinced of the need for regulation of the profession and the need and benefits of becoming licensed. While PEO is pro-active with its outreach, the frequency of contact, reach of its programs, and the depth and breadth of PEO's involvement during the academic career of a future engineer is not universally and enthusiastically supported and reinforced by faculty and schools.

For students at the elementary and high school level, PEO has programs to encourage math and science learning. Those exposed to the Engineer In Residence (EIR) program or classroom presentations or contests (especially during Engineering Month) have a positive view of the profession and see the value of math and science education. Engineers can contribute further to excellence in education and we understand there is an effort underway to make formal commentary on Ontario's math curriculum. Engineers have a special affinity for mathematics and this would be a positive contribution that could help enhance the profession's image with these students and their parents.

PEO volunteers including elected leadership

PEO has close to 1,000 volunteers fulfilling a wide range of roles and responsibilities: Chapter, Council, committee and other types of roles, e.g. EIRs. One of the key findings of this audit is that communication between the elected bodies of PEO is limited to relatively formal, scheduled events and communiqués.

Chapters are the main conduit of information to members about PEO. They are key to attracting qualified individuals to pursue licensing, encouraging employers to support licensing and influencing students at all levels to consider a career in engineering.

Inter-chapter communication is generally limited to Regional Congresses, and other formal events throughout the year that are open only to selected representatives from each chapter. A vehicle for sharing chapter best practices among all chapter volunteers and supporting chapters with their websites, event management and finances would be welcomed. In addition, chapters with one or more teaching universities in their area have an appetite to be more involved in on-campus activities promoting the profession.

Council seems to be a group apart for the members and chapters. While Council meeting dates, agendas and minutes are accessible on the PEO website, these materials are not prepared for general member readership nor are they easily searched for topics. For example, motions are often not easily understood in the absence of all the background materials, i.e. cannot stand on their own to communicate a decision of Council.

Other volunteers are involved in task forces, committees, tribunals, outreach programs, etc. The level of involvement of individual volunteers depends on the nature of the work in which they are involved.

PEO staff

Staff is clearly aligned to work with and communicate with specific stakeholders to help the organization fulfill its mandate. While the alignment allows staff to focus, the divisions of effort have created communication silos.

The Registrar issues a weekly update for Council and senior staff. Additionally, he hosts regular all staff meetings that are well attended. The purpose of this communication is to provide staff with a broader understanding of the business of the organization and ensure everyone is “on the same page” – thus breaking down some of the silos.

MPPs and bureaucrats

PEO’s Government Liaison Program (GLP) is well-developed and active. Most of the chapter leaders we spoke to invite MPPs, as well as elected officials at the municipal and federal level, to attend chapter events. The GLP Weekly provides evidence that meetings take place and outlines some of the upcoming opportunities to meet with MPPs.

The GLP representatives get training and have access to “GLP notes” on a variety of subjects. As noted in the Strategic Plan, however, there is a need to monitor new and revised legislation that could impact on the practice of engineering in the province. The existing program measures outputs, but is not being measured for its effectiveness to influence legislative outcomes.

General public

PEO does some paid advertising and has significant government, education and community outreach programs. While no recent quantitative data exists, the feeling is that the general public is largely unaware of the role of PEO as the regulator of the profession and the rigors involved in achieving licensure. Recent events (Elliott Lake and the Hydro One employee’s misogynistic remarks) have brought attention to the profession and PEO. The organization has a desire to communicate more positive messages about the profession and about PEO to the general public. A key question in this regard is whether this work should be the purview of PEO or OSPE. Differentiation and cooperation between OSPE and PEO continues to be a struggle for both organizations and members.

What are the current communication products PEO uses with its audiences?

Website

PEO’s website contains a wealth of information about PEO. PEO’s level of transparency with the information available is commendable. The issue most interviewees had with the website was their ability to search it for information. Some felt it was easier to just “google” the information rather than search the website. Some also felt that the website was not as visually interesting or as engaging as it should be. Of

note, virtually all PEO programs have either micro-sites or standalone sites and most chapters have their own sites. Chapters seem to be using PEO's visual identity standards consistently with their sites and their event announcements.

Email

Chapters and to a lesser extent PEO/Council, send eBlasts to advise members of events, issues, votes, etc. There were mixed views as to whether the volume and frequency of eBlasts was appropriate: too much for some, just right for others and for some not quite enough. Up to the introduction of Campaigner, there has been no reliable data, such as open rate and action, available to evaluate the effectiveness of eBlasts and other emails.

Engineering Dimensions

Engineering Dimensions is the identified official publication of PEO. The magazine is well known but not necessarily well-read. A readership survey is currently in the field to learn more about the readership of the online version of the publication. Most of the people we interviewed admitted to reading *Engineering Dimensions* less often or not at all since it began being published online. Most believed going online was the "right way to go" but some still prefer/opt for the hardcopy version.

The magazine is published bi-monthly. There is an appetite among those interviewed to have interim publications from PEO that would enable more timely updates, chapter news, Council updates, etc. While an "official publication" is required by the Act, to the best of our knowledge, there has not been a discussion of whether *Engineering Dimensions* is having the desired impact on the membership/public opinion.

Social media

To date, PEO has not had a significant presence in social media. There is a year-old LinkedIn group, managed by David Smith, which has over 2,000 members. This group has been quite active recently on the issue of how the title of "engineer" is used, this following the termination of a Hydro One employee who, while using the term engineer in his title, was not in fact a P. Eng. PEO also has a new Twitter feed, Facebook page and YouTube channel. At this point in time there is no information about members' interest in communication via these platforms.

Paid advertising and other marketing initiatives

In the past PEO has conducted some mass advertising (television commercials) to promote the organization and to create awareness about the contributions of the engineering profession, but the cost of such an initiative proved prohibitive. Advertising is currently limited to selected trade/industry publications, special features during Engineering Month and featuring the recipients of the Ontario Professional Engineers Award, and giving members the opportunity to purchase licence plates and licence-plate holders featuring the PEO logo.

Additional communication materials

PEO publishes a number of fact sheets, student booklets and pamphlets, GLP notes, media releases, disciplinary decisions, voting materials, etc. PEO also communicates with members individually with information about their discipline cases, the progress/next steps of the licensing process, etc.

When does PEO communicate?

For the established communication products, there is a regular flow to the outputs: annual report, bimonthly *Engineering Dimensions*, Registrar's weekly update, elections, chapter events, etc. PEO does produce some documents on an *ad hoc* or as-needed basis, such as media releases, GLP briefing notes, posts to LinkedIn, Twitter and Facebook. For Councillors and chapter leaders, the flow of information from PEO is steady and voluminous.

With the exception of bi-annual *Engineering Dimensions* readership surveys, PEO does not measure consistently whether communication from PEO is opened, read and acted upon. The one regular tangible measure PEO has is the percentage of members who voted in the election. And while the number of members voting in the last election increased, we have no way of knowing whether frequency, volume or quality of the communication received was in any way responsible for members' decisions to actually vote.

Where does PEO communicate?

A significant amount of communication with members happens at the chapter level. Chapters have their own websites, many have newsletters and some have their own LinkedIn groups and Twitter feeds. All use PEO's software to distribute eBlasts for announcements about events, but find the current email management program difficult as they do not get regular reliable feedback on things like bounce backs and open rates. These data will be available with the new Campaigner software which Chapter leaders are anxious to have operational.

EITs and those pursuing licensing receive a number of emails through PEO to inform them about the process. Additionally, PEO has online learning tools and seminars for EITs and holds information sessions for individuals interested in pursuing their licence.

When complaints are received about an individual engineer or a company, PEO maintains communication with all parties to a complaint about the progress of the investigation. If a complaint does get to a disciplinary hearing, the results of the hearing are published in *Engineering Dimensions* if the discipline panel so orders and are publicly available.

PEO also aggressively pursues court action against those who misuse or misrepresent the term "engineer" in contravention of the Act. If successful, these cases are publicized.

PEO has a presence at all levels in the education system. The intent in the elementary grades is to encourage building science and math skills; at the secondary school level,

the focus is on encouraging students to consider an engineering education at the post-secondary level. In colleges and universities, PEO ensures that first-year students are aware of PEO and promotes the benefits of licensing and the SMP. Graduates are encouraged and incented to enroll in the EIT program.

PEO has a mature Government Liaison Program (GLP) with MPPs. GLP members in each chapter are designated to maintain a relationship with their local MPP. PEO issues a weekly newsletter about the activities of GLP members. In addition, there are topical briefing notes available for GLP representatives to use in discussions with government.

Internally, with the anticipated installment of the latest version of SharePoint, there is an opportunity for have a more developed PEO intranet.

Why does PEO communicate?

It became clear in our audit that PEO has a dual personality. It is simultaneously a regulatory body and a member organization. PEO's stated mission is: Regulate and advance the practice of engineering to protect the public interest. This dual personality causes confusion among PEO members as there is no bright line between advancing the profession and advocating for engineering. That is why the delineation of the roles of PEO and OSPE is not clear to members

PEO currently has two sides to its communication: as the regulator and as a conduit to/for members. The licensing and disciplinary messaging needs to be at once clear and precise. General member, student, government and public communication needs to articulate the role of PEO as a self-regulatory body.

Member communication, particularly at the chapter level, has little to do with the regulatory mandate of PEO. Chapter events have a technical/engineering theme, such as tours of operations, lectures and professional development topics, but are also social in nature. Chapters in that sense are more communities of common interest.

That said, a deficiency for chapters is that they have no demographic information about their membership regarding their age/interests/areas of practice that could help the chapter identify programs to attract specific member audiences or broaden their reach into the membership. Most chapter leaders admit that participants at events seem to be the same people event to event and year over year. One chapter conducted a survey among its members to help with their programming with good results.

Chapter leaders get involved at Regional Congresses and at the PEO AGM, but the rank and file member has little to no exposure to the "business" of PEO. Lack of member involvement is of grave concern to PEO leaders. The future of self-regulation is dependent on a vibrant membership that is actively engaged in professional matters. For example, as PEO examines Continuing Professional Development (CPD), the outcomes of the deliberations of the *Continuing Professional Development, Competency, and Quality Assurance Task Force* could have significant consequences for individual members. However, at this stage members have received limited information on the task force's thinking and their opinion has not yet been sought (we

understand that an Ipsos Reid survey will be in the field in late July). As a result, it is entirely possible that some members will be “surprised” if new rules for CPD are enacted or if they are asked to vote on setting up CPD requirements to maintain their licence.

Indeed, many of the communication plans we were exposed to during the audit were developed to push information to members and present decisions as a *fait accompli*.

Recommendations

Strategic communication is driven by and should be measured by its ability to support the mission, vision and business plan (or in this case, the Strategic Plan) of PEO. Communication plans should be proactive, living plans that both push information and pull input from members. The plans should also include measures of success tied to desired business outcomes relevant to PEO’s mandate and Strategic Plan. The following recommendations are made with that intent in mind.

Know your audiences

A critical element to strategic communication is an understanding of the audiences you want to influence and engage. PEO needs to know more about its members and their interests if it is to effectively interact, engage and motivate them. To foster member engagement, PEO needs insights into the interests and motivations of various membership segments and be able to customize communication, both messages and vehicles.

Specifically, we recommend:

- PEO build a more intelligent database of its members and their communication preferences. This would allow PEO to reach members when, where and how it matters. Some ideas for collecting this information are:
 - At membership renewal time ask members to share their current involvement in the practice of engineering (retired? active?, chemical? structural?), involvement as a volunteer, interest in volunteering, preferred method and type of communication, use of social media, etc.
 - Contact members directly (telephone and/or email blitz) to gather demographic information using a market research approach.
 - Use chapters to help gather information.
- Once the database is built, conduct a comprehensive attitudinal/opinion survey to better understand the membership for ongoing engagement and to further leverage the demographic information.

Note: if CPD requirements are established, it is highly likely that a database to track individuals will be needed. Building a robust and multi-functional member database now, will facilitate this anticipated future need.

Tailor your messages

Consistent messaging about PEO's mission, vision and Strategic Plan is crucial if members are to understand the role of PEO and the value of being a member. We recommend erring on the side of too much repetition when it comes to helping the membership understand the mission, vision and plan as well as the difference between PEO and OSPE - at least until a survey can be conducted to determine whether the needle is moving on the membership's understanding of PEO's role as the regulator of the profession.

While all members must receive election materials and notifications of changes impacting the profession, other types of communication can be tailored based on the interest level and practice of the individual. For example, detailed technical documents about changes in building codes are unlikely to be of general interest but knowing that the profession is involved in setting those codes and ensuring qualified professionals oversee their implementation, is. By having a clear understanding of the message itself and its intended impact on the audience, repurposing content and providing the right level of detail becomes simpler.

The licensing process is not well understood by current license holders and those pursuing licensing either as EITs or foreign trained engineers. PEO needs to find a way to make this process more transparent and clear through its communications, perhaps with the use of flowcharts, decision trees and written materials.

Measure your impact not your outputs

For PEO to achieve its Strategic Plan, the communication plans attached to each of the goal areas need to be measured in terms of impact on the intended audience. Specific measures related to communication need to be established. Upon completion of a project, the Communications Team should be going back to the plan to evaluate results and consider what worked/what didn't.

For example:

- *Engineering Dimensions* is published bi-monthly – that is an output but what is the publication intended to accomplish for PEO? How can that be measured?
- The EIT program is intended to help qualified individuals achieve their license. Are the communication products fostering the desired outcome? Are there gaps in the program?
- With the communication plan to support the release of PEO's 2015 – 2017 Strategic Plan a number of tactics are detailed but there are no goals outlined e.g. #6 A media release announcing approval of the plan will be distributed to a targeted media list, with a link to the published plan. What media received the release? What media outlets asked for an interview with the Registrar/President? Were the media outlets Tier One or Tier Two? Were the articles positive/negative/neutral? Did the articles include PEO's messages? We understand that the Communications Team does have the answers to these questions, our recommendation is that impact targets are set prior to implementing plans.

Find your voice: Language, tone of voice and communications processes

There is inconsistency in the level of language and the tone of voice in PEO's communication products. Surprisingly for a profession that uses process flows, charts, checklists and visual representations of its work, these are conspicuously rare in PEO communication. For example, the licensing and complaints/discipline processes should lend themselves well to flowcharts.

Language level is an important factor as increasingly, Ontarians may not have English as a first language. Although PEO is a regulator, it should be possible to draft letters to individuals that are easy to read/comprehend. We recognize that at times citing portions of the Act is necessary but attempts should be made to simplify while maintaining clarity and precision. Similarly, PEO should have educators assess the language level of booklets targeted to teens and younger children.

As important as the level of language used, is establishing the PEO tone of voice. In some cases formality is required while in others it impedes communication. This will be particularly important as PEO continues to develop its social media presence.

We heard from staff that committee and/or Council consensus/approval on publications often means that the creation/development of publications gets bogged down. The balance between governance and execution in this regard seems to be off. Committees needing to communicate with specific audiences should agree to the objectives and content of publications and allow staff to execute. Having committees involve themselves in directing and approving graphic designs, layouts and editing is neither productive nor good use of volunteer and/or staff time.

With the move to relaunch SharePoint, PEO is considering an expanded intranet. Beyond the sharing of HR policies and the availability of training, the purpose of the intranet as a communication tool for a staff of under 100 people should be carefully developed and purpose driven. We recommend proceeding with caution in building an intranet with a careful examination of its strategic purpose and expected benefits as it will divert resources and require ongoing maintenance.

Differentiate PEO and OSPE Regulatory and Member liaison Roles

PEO and OSPE have articulated their desire to coexist and collaborate. Members of both organizations need to understand the difference between the two and have a reason to belong to one or both. At the same time, PEO has a dual personality as a regulator and a member-driven organization, which can cause some confusion. In the evaluation of programs and their communication, PEO needs to continually assess where the line is between regulatory, advocacy and member communication.

It is imperative that PEO more clearly differentiate itself and clarify its roles and responsibilities, developing consistent messaging in concert with OSPE.

- Consider using Engineering Month as an opportunity to share messages about the roles and responsibilities of each organization.
- Consider some additional paid advertising, possibly during Engineering Month, to further create awareness and education about the roles of the two organizations.

From a business perspective, clarity on this issue will also support decisions about the use of resources.

Critically evaluate your communication products

When the most recent reader survey data is available, we recommend PEO critically examine *Engineering Dimensions* for its purpose, frequency, topicality, etc. This publication represents a significant use of communications resources – is it the right use?

- Consider making *Engineering Dimensions* a quarterly publication and re-deploying resources to create a weekly or bi-weekly e-newsletter as well as social media content, for more timely delivery of news and updates.
- The launch of a quarterly *Engineering Dimensions* could be used as an opportunity to re-fresh the publication with an updated look and feel e.g. more visual, less text dense, more focus on celebrating the achievements/accomplishments of PEO, the profession and its members.
- Consider focus group testing with members to get their input on proposed changes to the publication.

We understand that the PEO website was re-launched in 2013. That said, based on comments from several interviewees, its search function is not intuitive for users. A critical review of the navigation and search functions from a user perspective may yield opportunities for improvement.

It is time to find a way to communicate Council business in such a way that members feel involved and informed. The current publication of minutes, motions and agendas is not helping members understand the “business” of PEO. Some possibilities here are producing meeting updates and decisions into digests and/or incorporate them into an e-newsletter.

PEO needs to develop a communication strategy and plan to determine in which format its products should be produced (online, video, print, etc) and distributed (email, mail, video formats, meetings, etc.). For example, one goal could be to have the 2018 Council elections totally electronic – no production or distribution of paper voting materials or ballots.

We recommend PEO create a process to share more timely updates for members – this could be a combination of a Council digest, Registrar’s report, and interim or parsed articles from the digest, committee updates, etc.

Take advantage of the skills of the Communications Team

One of PEO’s strengths is a Communications Team that is professionally qualified and knowledgeable about the organization. The Communications Team which is now represented on the senior leadership team is ideally positioned to provide communication support and consistency in messaging, language and tone.

- Working with the Registrar and Council, develop guidelines for Committees on how to best leverage the resources provided by the Communications Team: show them how the Team can support their work and help them deliver on objectives in a timely fashion. Create a forum to share, discuss and implement the guidelines with the Committees and their Chairs.
- The Communications Team should act as THE channel for the review of all communication from PEO in order to revise and simplify such materials as letters to applicants, explanations of key processes (licensure/discipline/application for volunteering), materials for students, website content, etc. By having the Team review all materials over a period of time (say one year), materials will have a consistent level of language, tone and manner. Once established, guidelines and templates can be established such that others within the organization can also develop materials that will be in keeping with PEO's voice.
- There are additional opportunities for "cross-pollination" between the various areas of PEO e.g. Communications, Education, Chapters/volunteers, to develop content and coordinate efforts.

Leverage Chapters as messengers

As mentioned, chapter leadership is looking for "big picture" information from PEO and would like Council to be more accessible. We recommend PEO assess vehicles and forums to facilitate the sharing of information between the Registrar, Council and chapter executives (e.g. webinars, Skype chats, Go-to-Meeting, etc.). Messaging, talking points, Q&A, training/rehearsal with the Registrar and Councillors beforehand can help ensure a meaningful discussion with the chapter executives.

Additionally, chapter executives are looking for ways to share best practices with others throughout the province, beyond the Regional Congresses, leadership training session and AGM. A PEO-managed discussion forum for chapter executives should be considered before chapters set this up on their own. This could dovetail with helping chapters with their websites, event management and their finances.

Establishing a PEO staff calendar, available for viewing on the website, which shows dates when staff/Registrar/Council are making presentations, attending key meetings and conferences will help chapters integrate with PEO plans and support local efforts at important events.

Summary

PEO communications are solid but could be leveraged further to help the organization achieve its goals and to build PEO's stature in the minds of all its stakeholders. There are a number of challenges that need to be addressed to take PEO communications to the next level: not having insights into the many demographic groups within the membership in order to tailor messages, fully engage and motivate; not being able to clearly differentiate PEO and its role to the membership vs. the role of OSPE; and not fully utilizing or optimizing the resources available within the Communications Team to

develop a consistent “voice” for the organization. Implementing the recommendations outlined in this report would greatly help the communication function to support and help achieve PEO’s Strategic Plan.

Acknowledgements

We would like thank PEO for the opportunity to conduct this audit. We are especially appreciative of the support we received from Connie Mucklestone as we conducted our research. Her candor and knowledge of PEO were invaluable. We would also like to thank the 31 people (see Appendix) who willingly and generously spent time with us answering our interview questions.

Appendix: List of Interviewees

Councillors

George Comrie
Charles Kidd
Warren Turnbull
Sharon Reid
Rakeesh Shreewastav
Pat Quinn
Dan Preley
Bob Dony

Chapter executives

Stacy Shyshak
Mike Barker
Barry Westhead
Lawrence Lupton
Michael Blair
Kaoru Kyajima
Sani Paymon
Kent Percival
Jeganaesan Jeganathan

PEO Staff

Mathew Ng
Gerard McDonald
Jennifer Coombes
Michael Mastromatteo
Nicole Axworthy
David Smith
Stephanie Katchmar
Michael Price
Scott Clark
Fern Goncalves
Johnny Zuccon
Manoj Choudhary
Jeanette Chau
Linda Latham