



Professional Engineers
Ontario

INTERHANDBOOK



INTERHANDBOOK

1. Welcome and Introduction

Licensure Assistance—Our Vision:

Licensure Assistance contributes to developing professionals who adhere to the highest standards of engineering practice, and are capable of assuming leadership roles within their companies and communities.

Members of the public rely on Professional Engineers Ontario (PEO), the licensing and regulating body for professional engineering in Ontario, to ensure that professional engineers in Ontario meet high standards of qualification, ethical practice and professional conduct.

Guides make a difference

Guides provide:

- guidance on the licensing requirements;
- insight into ethical practices;
- an understanding of an engineer's responsibility to the public;
- integration into the engineering community;
- leadership development.

PEO is dedicated to encouraging qualified individuals to be licensed as professionals. Formally, enabling an engineering intern to receive guidance and support

from an experienced professional engineer helps meet this mandate. Licensure assistance is a means to perpetuate the high standards of the profession and raise the profile of the association.

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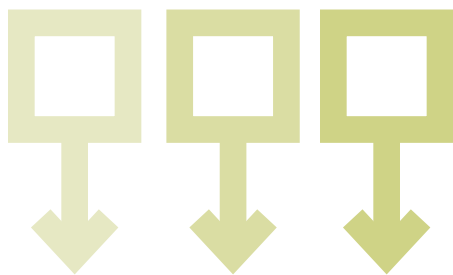
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Contents

Welcome and Introduction.....	3
Before You Start: How to Use This Handbook	8
Stages of the Licensure Assistance Relationship and Supporting Tools	10
The Intern's and Guides's Commitment	11
PEO and the Licensure Process	12
About PEO	13
Why Licensure Assistance is Important to PEO.....	14
How Licensure Assistance Supports the Intern.....	15
The Importance of Confidentiality.....	16
Being an Intern–How to Work With Your Guide	16
 Licensure Assistance Techniques	 17
Notes for Interns on Things to do to Build a Licensure Assistance Relationship	17
Building Trust	18
Managing Expectations	18
Dynamic Listening Technique.....	19
Three Common Conversations Technique	20
Feedback	21
How to Work Through Issues With Your Guide	21
Example of Issue Exploration: Debrief.....	22
Issue Identification Worksheet.....	23
What to do if the Relationship is not Working.....	24
 Other Useful Tips	 25
The Written Word: Email Etiquette	25
Online Licensure Assistance Relationships.....	26
Online Relationship Guide.....	27
Telephone and Voice Mail Etiquette.....	29
 Managing Diversity	 30
Cross-cultural Awareness and How to Manage Differences.....	30
Licensure Assistance as a Mature Engineer	31
Licensure Assistance with Boomers.....	32

INTERNHANDBOOK

INTERNHANDBOOK

Career Development Tools	33
4. Self-Exploration Lifeline Review and Identifying my Core Strengths	34
5. Values Exploration	37
6. Intern Self-Assessment: Preparedness For Licensure	38
7. Intern Licensure Process Skills Scan	39
8. Intern Learning Competency Scan.....	40
9. Creating Learning Goals Using SMART	41
10. Finalizing a Learning Plan	42
11. Learning Plan	43
 Licensure Assistance Meeting Planning & Journal	 45
12. First Meeting Agenda	46-47
13. Second Meeting Agenda	48-49
14. Third Meeting Agenda	50-51
15. Journal	52-54
 Licensure Assistance Orientation and Launch Worksheets	 55
16. Worksheet: Getting to Know Each Other	56
17. Risk & Risk Mitigation Strategies	57
18. Code of Conduct and Program Operating Principles	58
19. Licensure Assistance Accord	59
11. Learning Plan (duplicate)	60
 Appendix	 61
Sources & Resources	61
The Five Elements of Engineering Experience for Licensing	61

Before You Start—How to Use This Handbook



This handbook is a “working notebook”. It has been designed as a resource, tool kit and meeting notebook, all in one. It contains information, models and techniques to help you maximize the learning relationship with your guide.

This handbook and the corresponding **Guide Handbook** have been written with interns’ needs in mind. The tools, tips, and techniques are highly practical, easy to reference and use, and one page in length. Brief theoretical frameworks and models are provided for context and, again, are written to be accessible and one page long.

Interns are not expected to read the handbook cover-to-cover (unless they really want to!), but rather to use the tools they need, when they need them, to address the matters at hand. The handbook is not a training manual where you are expected to follow exercises in sequence.

The handbooks are resources to support your relationship, not drive the relationship.

A licensure assistance overview chart, called **Stages of the Licensure Assistance Relationship and Supporting Tools** (page 10), is provided in this **Welcome and Introduction to Licensure Assistance** section. This licensure assistance “at-a-glance” identifies what to expect at each stage of the relationship with your guide and provides a selection of tools you can use to help with your development.

At the launch of the relationship, you will find it useful to have background information on PEO and how licensure assistance supports your development toward your licence. You will find this information in the **Welcome and Introduction to Licensure Assistance** section. To find necessary tools for the PEO examination process, you can check the list provided in the Appendix (page 61).

All the tools in this guide are identified by name and number. The **Tools** section (page 33) contains career assessment tools for you to use as a pre-cursor to setting your learning goals for the program. This section contains such tools as **#4 Self-Exploration Lifeline Review**, **#5 Values Exploration**, **#9 Creating Learning Goals Using SMART**, **#2 Guide Licensure Process Skills Scan**, and **#19 Licensure Assistance Accord**, to name several. All tools are available for individual use, as downloads from the PEO website.

These career assessment and goal-setting tools are replicated in the **Guide Handbook**. They are designed in several different formats, since learning styles vary. Select the tool you find the most useful for generating the information needed for effective planning.

The section on **Techniques** (page 17) provides a selection of coaching processes that will be helpful for the many different conversations you will have. These processes include how to work with a guide, types of conversations, listening skills and how to bring issues forward for exploration. Take time to review these techniques so that when you have a need for a technique or process, you know it is at your fingertips.

The **Techniques** section also provides **Other Useful Tips** (page 25) for those who will use technology to support their relationship. Tips on how to use email and the telephone are provided. These tips are also in the **Guide Handbook**.

If you are an international engineering graduate new to Canada, or are a new graduate, you have particular needs and pressures. The section on **Managing Diversity** (page 30) provides insights and tips on how to work effectively with your guide.

The **Licensure Assistance Meeting Planning and Journal** (page 45) provides agendas for meetings, and ideas of what to do in your relationship and journal pages to capture learning, ideas and notes to bring forward at subsequent meetings. These are to help you manage your relationship and provide structure. Many pairs find having a structure useful for keeping track of progress. Use what you need, or create your own method of managing an agenda and learning journal.

The **Licensure Assistance Orientation Worksheets** (page 55) section contains several exercises guides and interns will work through at the orientation session. This section includes two of the most important documents you will need throughout your relationship, the **#19 Licensure Assistance Accord** (page 59) and the **#11 Learning Plan** (page 60 is a duplicate). If you or your guide missed the

orientation session, please take the time to complete your **Licensure Assistance Accord** and **Learning Plan** at the onset of your relationship.

The **Stages of the Licensure Assistance Relationship and Supporting Tools** chart on page 10 captures the major phases of the relationship and identifies several tools that may help at each stage. Use what you need, when you need it, for the matter at hand.

Stages of the Licensure Assistance Relationship and Supporting Tools



This chart illustrates the typical stages and flow of the licensure assistance component of the learning process, some of the things that can be expected at each stage and several activities that may be engaged within the stage.

Stage 1: Feasibility	Stage 2: Blueprint	Stage 3: Build	Stage 4: Operations	Stage 5: The Close
Assessing your readiness—is this program for me?	Preparing to start	Initiating the relationship	Making it work	Closing or redefining the relationship
<p>Explore and reflect upon becoming a guide/ intern—what learning do you wish to achieve?</p> <p>Guide/ intern registers in Licensure Assistance Program</p> <p>Once matched—interns and guides participate in the orientation sessions</p>	<p>Guide/ intern uses Career Development Tools in the Tools section as a means of getting to know each other and foundation for goal setting</p> <p>Guide/ intern sets goals and Licensure Assistance Accord for the relationship</p> <p>Determine mode of relationship—email; telephone; in person; frequency of meeting; logistics</p>	<p>In the very early phase of the relationship, the intern often needs the guide to provide structure by setting the agenda for the first three meetings to launch the relationship</p> <p>The greatest time and energy investment is in this stage as guide and intern get to know each other and establish the foundation for trust.</p> <p>Building a trust foundation: review Licensure Assistance Accord, Code of Conduct and Check-List</p> <p>Preparing for First Meeting</p> <p>Establish meeting schedule</p> <p>Exchange information about self, goals, values, draft learning goals</p> <p>Full-engagement in licensure assistance</p>	<p>Interns become increasingly self-reliant and take more lead in the relationship by setting the agenda and bringing experiences to the guide for exploration and learning</p> <p>Greater focus on exploration of complex issues</p> <p>Trust is established and issues are addressed directly, with critical feedback and in-depth exploration</p> <p>Where interns capture their learning in a learning journal, it helps develop insight</p> <p>Review learning plan and progress</p>	<p>Close or new beginning</p> <p>Guide and intern may agree to establish new goals and continue the relationship</p> <p>Program evaluation</p> <p>Acknowledge, thank and celebrate</p>
Activities for guides and interns as the relationship evolves				
<p>Review licensure assistance tools</p> <p>Complete your choice of guide/ intern self-assessment tools to prepare the #11 Learning Plan and #19 Licensure Assistance Accord</p>	<p>First/second meeting: share #4 Self-Exploration Lifeline Review or Worksheet; #16 Getting to Know Each Other; or #5 Values Exploration content</p> <p>Discuss personal boundaries—draft #19 Licensure Assistance Accord</p> <p>Use #12 Meeting Agenda and #15 Journal to capture insights, learning and assignments</p>	<p>Third meeting: finalize #19 Licensure Assistance Accord</p> <p>Review #9 Creating Learning Goals Using SMART, #10 Finalizing a Learning Plan or #11 Learning Plan</p> <p>Third-month review progress—how is the relationship working? Assess progress on your #11 Learning Plan and #19 Licensure Assistance Accord</p>	<p>Explore issues and experiences: use page 23 Issues Identification Worksheet, if needed</p> <p>Address problems as they arise</p> <p>Fifth-month review: how has the relationship evolved? What works, what doesn't? Is progress being made on learning goals? Is there a need to establish new #19 Licensure Assistance Accord or #11 Learning Plan?</p>	<p>Is it time to wrap-up the relationship or continue?</p> <p>Provide feedback to coordinators, evaluate learning and the licensure assistance program.</p> <p>Express appreciation to your guide/ intern for their contribution to your personal/ professional development</p>
Unique activities for interns				
<p>Identify your learning goals</p>	<p>Establish and discuss the Licensure Assistance Accord</p> <p>Discuss the Code of Conduct and Program Operating Principles</p> <p>Set meeting schedule</p>	<p>Bring your experiences to the guide for discussion and learning. Think of experiences as any area that you wonder about—what is your question?</p>	<p>Continue to bring experiences and issues forward for exploration</p> <p>Bring forward issues to explore and apply the principles and ethics of PEO</p>	<p>Identify a way to bring closure to the relationship and thank the guide for their contribution to your development</p>

The Intern's and Guide's Commitment

The Intern's Commitment

With an overall focus on managing, driving and directing the learning relationship:

- Meet monthly for two hours over six months
- Meet in person or use technology
- Bring issues, experiences and questions to the guide for discussion and exploration
- Practise and learn together
- Review history and experiences to learn from successes and set-backs
- Maintain confidentiality
- Provide regular feedback to PEO on the overall progress of the program

The Guide's Commitment

With an overall focus on supporting the major factors that lead to licensure:

- Meet monthly for two hours over six months
- Meet in person or use technology
- Be available to discuss issues with the intern by telephone or email as and when needed
- Practise and learn together
- Review history and experiences to learn from successes and set-backs
- Maintain confidentiality
- Provide the context for understanding experiences and issues to improve the overall calibre of decision making
- Provide regular feedback to PEO on the overall progress of the program

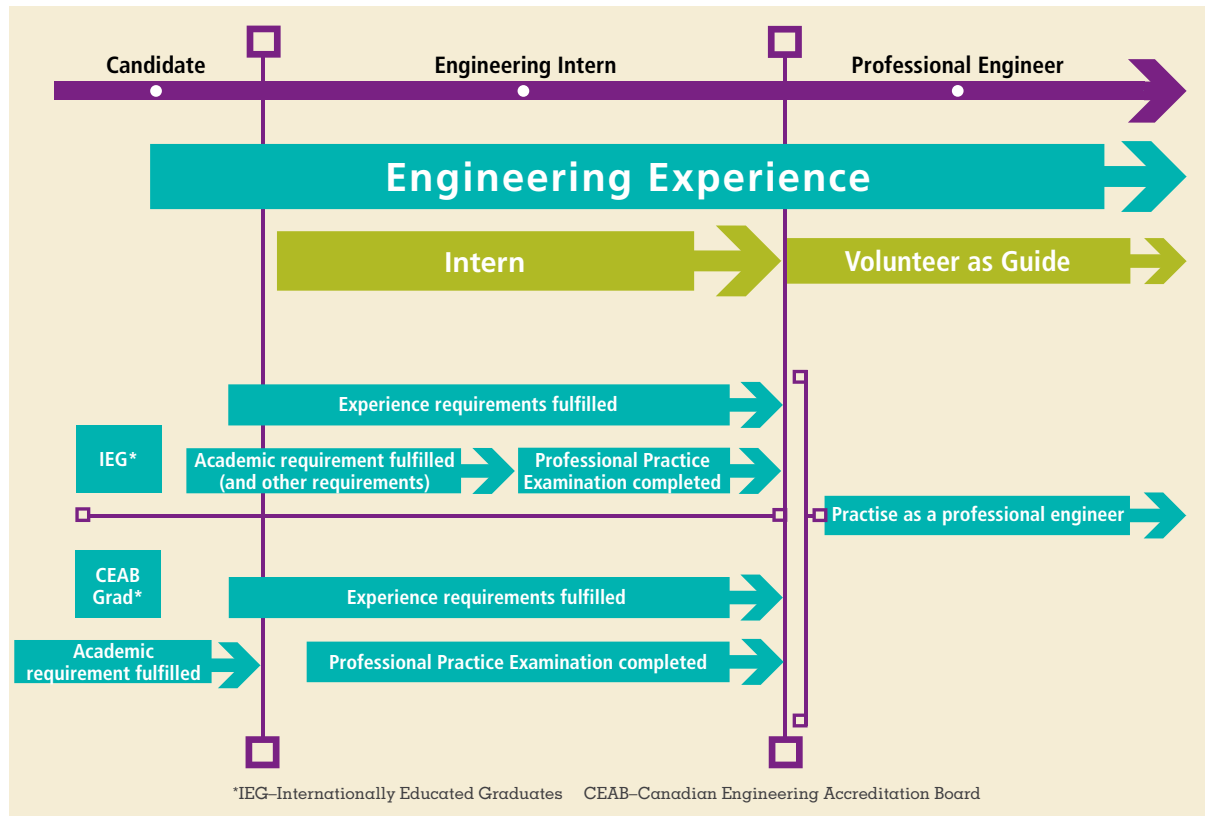


PEO and the Licensure Process

The relationship evolves through a natural flow of building trust, disclosure and feedback.

This diagram illustrates how the licensure assistance relationship evolves and supports the process of becoming licensed as a professional engineer. Over time, the focus of the relationship will change; the issues addressed and content of the conversations will become more complex and richer for learning. Ultimately, when you are well supported in your learning, you have the potential to develop a higher level of capability and might become a guide to the next generations who follow.

Licensure Process



About PEO

Professional Engineers Ontario (PEO) is the body that licenses, regulates and sets standards for professional engineering in Ontario to serve and protect the public. It is responsible for licensing professional engineers, granting temporary, provisional and limited licences to practise professional engineering, authorizing companies to provide engineering services, and investigates complaints against licensed practitioners and companies and disciplining them if found guilty of incompetence or professional misconduct.

The association also enforces the licensure and title provisions of the act against individuals who practise professional engineering without a licence or misrepresent themselves as professional engineers.

The responsibilities of the association are described in the *Professional Engineers Act* and Regulations, which have been established by the Ontario government.

PEO's office is located in Toronto, Ontario.

The association licenses over 75,000 professional engineers in Ontario organized across 36 regional chapters, and authorizes entities to offer and provide engineering services. PEO licenses more than 2,000 professional engineers each year.

PEO's Legislated Mandate

PEO governs licence and certificate holders and regulates engineering practice so that "the public interest may be served and protected". PEO is also mandated to carry out the following additional objects under the act:

1. Establish, maintain and develop standards of knowledge and skill;
2. Establish, maintain and develop standards of qualification and standards of practice for the practice of professional engineering;
3. Establish, maintain and develop standards of professional ethics; and
4. Promote public awareness of the role of PEO.

The act gives PEO the power to make regulations for administration of PEO (such as fixing the number of professional engineers elected to Council), admission to PEO (such as academic training), and standards of professional engineering practice (such as setting a code of ethics). The act permits PEO to make bylaws relating to its administrative and domestic affairs, such as defining the duties of the Registrar.

PEO is governed by a Council, the composition and operation of which are dictated by the act and regulations. Most councillors are elected by PEO's members. Some councillors are appointed by the Lieutenant Governor-in-Council of the Province of Ontario. These appointed councillors may or may not be professional engineers. The PEO Registrar is responsible for staff implementation of PEO Council's decisions and policies.



Why Licensure Assistance is Important to PEO

This program provides you the opportunity to interact one-on-one with a professional engineer and acquire insight into professional practices and ethical decision making. You have the opportunity to gain perspective on the reasons engineering is a licensed profession and its role in society. You

further benefit by having access to a wealth of knowledge and proven acumen in identifying and making wise professional career choices. The inspiration and motivation that a guide can provide is invaluable to anyone at the beginning of a career or starting anew in Canada.

Guidance from an experienced, licensed individual in risk management can put you years ahead of a counterpart who does not have the same access to this knowledge and expertise. This helps prepare you on how to prevent or successfully navigate potentially damaging situations.

Your guide learns as well. Guides gain an awareness of the challenges new graduates face and the difficulties internationally trained graduates must overcome on their way to licensure. Guides find it is an opportunity to acquire knowledge of new technologies and terminology and are energized to set and achieve their own professional career goals.

A sense of satisfaction is waiting!

Participation in licensure assistance displays a commitment to maintaining and promoting the highest standards of the profession.

PEO expects people are participating of their own free will and will act in good faith. PEO does not monitor the individual relationships.



Attributes of an Effective Guide

- A desire to help another individual succeed in the profession
- Ability to listen actively
- Good rapport building skills—ability to empathize with another
- Ability to inspire and encourage
- Commitment to meeting with an intern on a regular basis
- Ability to set and meet measurable goals
- Ability to provide corrective feedback without discouraging the intern's enthusiasm
- A desire to promote the profession



Attributes of a Successful Intern

- Enthusiasm
- Ability to listen actively
- Initiative
- Follows through
- Seeks ways to speed up learning
- Willingness to accept corrective feedback
- Brings experiences and questions forward for exploration and discussion with the guide
- A desire to learn from experiences

How Licensure Assistance Supports the Intern

Licensure assistance plays a key role in helping you achieve success beyond what you might have achieved otherwise. Within the world of work and developing the skills for licensure, guides play a unique and valuable role. Guides:

- allow and provide the time needed to discuss and explore the context for the “how and why” of an experience (for example: why things are done a certain way; how an activity will have an impact on others);
- provide an understanding of the context of an experience;
- provide a context for how decisions are made;
- focus on the development of you as a whole person;
- provide guidance in risk management;
- provide insight into your core strengths, values and overall potential;
- provide a sounding board for understanding interpersonal relationships, improving your ability to problem-solve potential conflict situations; and
- explore ethics issues, risks and mitigation processes, enhancing your ability to make effective decisions;

The Licensure Assistance Program is not intended to:

- help you get a job;
- promote you for jobs/assignments;
- supervise your work assignments;
- find a P.Eng. referee for you.



Summary of the PEO Guide Role Requirements

The program's objectives are to link engineering interns (interns) with professional engineers (guides) to enable interns to:


- receive guidance on meeting the association's licensing requirements;
- gain general insight into ethical practice and decision making;
- develop a sound understanding of their responsibility to the public as well as to the engineering profession; and
- receive guidance on assimilating into the engineering community and business climate within Ontario.

Interns will have the opportunity to plan and develop career strategies and receive assistance on how to achieve life-skills balance. However, the licensure assistance program is not a job finding vehicle, and guides are not to be approached about finding work or acting as experience references.

The Importance of Confidentiality

In keeping with the PEO code of ethics, managing confidentiality builds trust. To that end, participants may not share sensitive or proprietary information regarding their work and/or company, without written permission from their supervisor and senior company official.

Maintaining confidentiality is of utmost importance. It cannot be emphasized enough the importance of you and your guide maintaining, at all times, confidences shared—even beyond participation in the program. Any breach of confidence will hurt individuals and ruin the program for everyone.



Guides are not to provide technical guidance on work-related activities to their interns. In instances where a guide is asked to monitor an intern's work with the intent of being a referee, agreements must be made with the intern's employer. Guides will- ing to act as an intern's monitor must meet all the requirements as outlined in PEO's *Guide to the Required Experience for Licensing*.



Being an Intern—How to Work With Your Guide

It is important to build a solid relationship with your guide. Your guide has many ideas, insights, and information that can be shared with you.

The key to making the most of your relationship is to bring experiences to explore and questions to ask. An experience and a question might be anything that raises a “I wonder... why, how, where, when, what...?”

The following tips will help you build a solid learning relationship:

- Get to know your guide. Find out about the guide's background, how the guide chose engineering as a profession, what the guide likes about what the guide does, what some of their challenges have been and how they overcame those challenges.
- Ask your guide how they built their networks over their career. What did they become involved with that helped them the most?
- Share your experiences from other employers, summer jobs, work-terms, and experiences in other countries as a means of exploring for your own learning. By sharing, your guide will learn from you.
- Ask questions that will show how work-life balance is supported in different organizations.
- Build understanding and awareness of what is important to be successful in the workplace, as well as to prepare for the licensing process.
- Be forthright! Your guide is there to help you learn—take full advantage of the opportunity.
- Enjoy your relationship!

2. Techniques

Notes for Interns on Things to Do to Build an Effective Relationship

Getting the relationship off to a good start in the first two to three meetings is critical for success. The following are ideas for exploration:

- Practise and get feedback on a presentation.
- Get feedback on managing relationships.
- Get feedback on plans, strategies, proposals.
- Get feedback on personal leadership style.
- Co-chair a meeting.
- Attend a meeting to see how the guide handles situations, relationships, issues; have a discussion about observations.
- Attend a luncheon or conference together, discuss ideas and determine their applicability to an issue or project you are working on.
- Do a case study together to build analytical and critical thinking skills.
- Build and cultivate new alliances and new networks.
- Work through a real problem or issue faced in the workplace.
- Learn how to gain support for a new initiative.
- Learn and practise the dynamics of interpersonal relationships.
- Practise your presentation skills.
- Practise for an interview.
- Work on career and life goals together.



"No one who achieves success does so without the help of others. The wise and confident acknowledge this help with gratitude."

Alfred North
Whitehead

Building Trust

Effective relationships are built on a foundation of trust. Establishing and maintaining this trust is a significant factor in the effectiveness, satisfaction and success of the relationship.

Trust is built on an ongoing demonstration of integrity, competence, consistency, loyalty and openness. You need to believe that your guide's input and insight is well considered, based on experience and provided in an effort to help you succeed.

The responsibility for building trust is shared

- You must openly share the issues that concern you and be aware of your own vulnerability.
- Guides must openly share the learning lessons from their own history—including their own struggles, failures and vulnerability.
- Together, you must work to support your commitment to respect each other.

Elements of trust

- Trust is earned over time.
- Trust grows with genuine interest in the other person.
- Trust involves taking risks—it builds by taking one small risk at a time.
- Trust takes a long time to build, and can easily be destroyed.

What can we do to build trust in our relationship?

Managing Expectations

Often you and your guide enter the relationship with expectations of each other that need clarification and discussion. Clarifying expectations will enhance the development of trust and reduce the risk of frustration and disappointment.

- There are more generations in the workplace today than ever before. Different generations approach the world of work with different expectations, and different personal and work values. Take the time to find the similarities and the differences in how problems are solved and decisions made.
- Spending time with your guide working on issues, problems and projects, or sitting on committees together helps build trust.
- You need to be prepared to share your goals and dreams. Guides have goals as well. Learn about your guide's goals. You can support each other's efforts to achieve goals.
- You own your own development. It is up to you to identify the goals of your relationship and to request the information and help you need.
- You need to be open to the feedback that you have requested. There will be times when the feedback will not go in the direction you would prefer, yet it may help you considerably.
- Nothing is automatic. There must be time invested in the relationship for the relationship to be fruitful. Set a schedule to meet, and keep to your schedule. Discuss and plan for the schedule you need. There will be times an agenda is useful and other times a more relaxed approach works well. Take the time to discuss your mutual needs.

Dynamic Listening Technique

The five steps of dynamic listening for effective feedback and problem resolution are:

Step 1: being present

Being present means I am here, attentive and engaged in the conversation. I maintain my focus on the other individual in every way: how they are emotionally, their tone of voice and spoken words. I demonstrate that I care about the conversation.

Step 2: recognizing and working with interdependence

My effort here is to make sure the conversation is good for both of us. I will make an effort to be supportive of the other person.

Step 3: suspending judgment

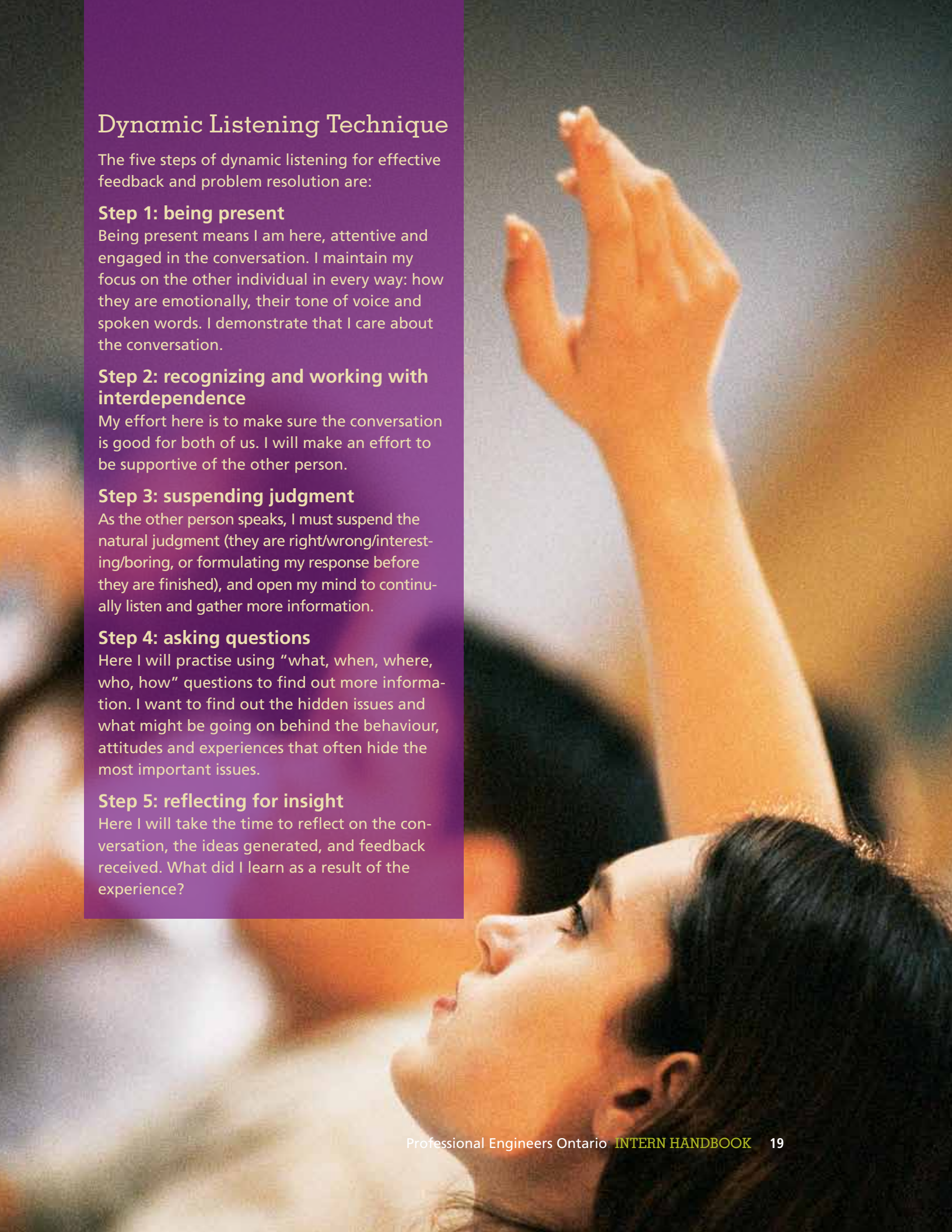
As the other person speaks, I must suspend the natural judgment (they are right/wrong/interesting/boring, or formulating my response before they are finished), and open my mind to continually listen and gather more information.

Step 4: asking questions

Here I will practise using “what, when, where, who, how” questions to find out more information. I want to find out the hidden issues and what might be going on behind the behaviour, attitudes and experiences that often hide the most important issues.

Step 5: reflecting for insight

Here I will take the time to reflect on the conversation, the ideas generated, and feedback received. What did I learn as a result of the experience?



1 2 3

Three Common Conversations Technique

As the trust in a relationship develops, the types of conversations you and your guide have will change. These conversations will be more open, accepting and “deep”. These three conversations can be seen as flowing through three levels:

Level 1: relationship building conversations

Level 2: technical conversations

Level 3: strategic conversations

The following are examples and processes to move the conversation from friendly relationship building to a strategic conversation—where real learning can take place.

Level 1: relationship building conversation

“I have learned that always there are a lot of things inside myself.”

Intern

This level is where we begin all new relationships. It is important to the relationship to start with this type of social conversation—don’t rush this stage as it builds trust and comfort, and sets the foundation for the deep conversations that will come later.

How to do it

- Be interested in the other person—who they are, what is important to them, what they like to do—at work, in the community and in their leisure time.
- Look for things/interests/areas you have in common.
- Be open to sharing and talking about your own background.
- Be open and non-judgmental about their strengths and weaknesses.
- Be thoughtful in how feedback is provided so as not to harm the relationship.
- Discuss what you are hoping to gain or learn as a result of being in the licensure assistance program.

Level 2: technical conversations

This level is characterized by all the “how-to” information: for example, how to get something done; how to access resources you need for integrating into the Canadian workplace; how to explore how a design change can be implemented in a manufacturing process; how to become involved in associations and as a volunteer; how to conduct yourself in a meeting.

How to do it

- Ask questions to identify and understand the process.
- Gather detailed and descriptive information related to the issue.
- Get descriptive feedback and knowledge to build skills in “how to...”.

Level 3: strategic conversation

This level is characterized by the guide bringing a broader perspective to the issue raised—for example, situating your job within the context of being an internationally educated graduate new to Canadian workplace culture and how to integrate effectively.

To engage in this level of conversation, you need to feel a deep level of trust to share your goals, dreams, and vulnerabilities. This requires self-knowledge to be able to explore and discover in a “help me understand why...” way of learning.

At times the feedback will be difficult to accept as it may challenge deeply held personal values, principles and assumptions. This conversation is one people value the most as it allows for the exploration of new approaches that may not have been considered in the past, opening new opportunities.



Feedback

Feedback that results in change is a sign of an effective coaching relationship. Sometimes, feedback will be difficult to hear and sometimes feedback will build your confidence and esteem.

The key is to keep in mind that feedback is given to help you be successful.

Recognize that feedback belongs to the behaviour, not to who you are as a person.

"It is not about who you are; it is about the behaviour that needs to change."

When learning from feedback, consider:

- What do I need to do more of?
- What do I need to do less of?
- What do I need to keep?
- What do I need from others to know that the change I am making is on the right track?

How to Work Through Issues with Your Guide

The guide's role is to facilitate a process of exploring the concerns and issues you bring to the relationship. See Issues Identification Worksheet, page 23.

In this process, you will bring your experiences forward to explore. Your guide will probe and ask questions to help you understand the broader context (exploring the different areas that could be influencing the decision that was made) or for reasoning through a problem that needs to be solved. One example follows on the next page.

Issues Identification Worksheet

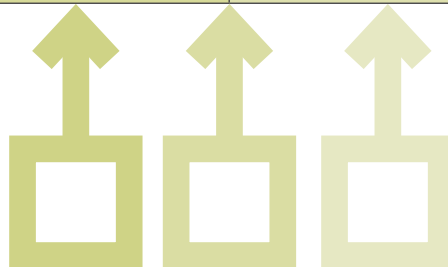
Presenting issue/description of the event: Step 1: Describe the facts of what occurred.	Identify (with the guide) key points of context, such as: What is going on in the environment that makes this issue important? Step 3: Identify the areas where the guide may add the most value in questioning and explaining the context of what was experienced.
Associated behaviours experienced with self and others: Step 2: Describe the various emotions experienced at the event or as a result of the event. This may include emotions, attitudes, moods and behaviours that the other party may have displayed or experienced.	Key questions to explore with my guide: Step 4: Formulate several questions to find out why (this is a back and forth process with step 3), or to identify what can be done as a next step in resolving the issue.



Example of Issue Exploration: Debrief

This chart is an example of a problem debrief process. This will help build understanding of the hidden behaviour aspects of what may be influencing an intern's success. The outcome is the development of greater insight into how to "read" a situation to improve performance.

<p>Presenting issue/description of the event:</p> <p>The intern:</p> <ul style="list-style-type: none"> I attended a meeting with my manager and offered a new idea to solve a problem that I thought was a better idea than his. My manager cut me off in the meeting and was visibly angry. 	<p>Identify (with the guide) key points of context, such as: What is going on in the environment that makes this issue important?</p> <p>The guide and intern discuss:</p> <ul style="list-style-type: none"> the experience of frustration for both the manager and the intern; the details of process: <ul style="list-style-type: none"> Did the intern prepare the manager for the new idea? What was the nature of the meeting—to explore the problem and establish a problem solving strategy; explore complexities of the problem; make a decision? What was the timing and sequencing of events?
<p>Associated behaviours experienced with self and others:</p> <p>The intern stated:</p> <ul style="list-style-type: none"> I think the idea was sound and would have solved the problem. I don't understand why my manager got upset. After all, we were there to problem solve this issue in the first place. The other people in the meeting wanted to hear more about my idea, but my manager stopped the process. I find this frustrating, why wouldn't my manager want to listen? 	<p>Key questions to explore with my guide:</p> <p>The intern asks:</p> <ul style="list-style-type: none"> How can I position a solution to a problem? How can I improve the relationship with my manager? How can I get useful feedback from my manager on how I am doing?



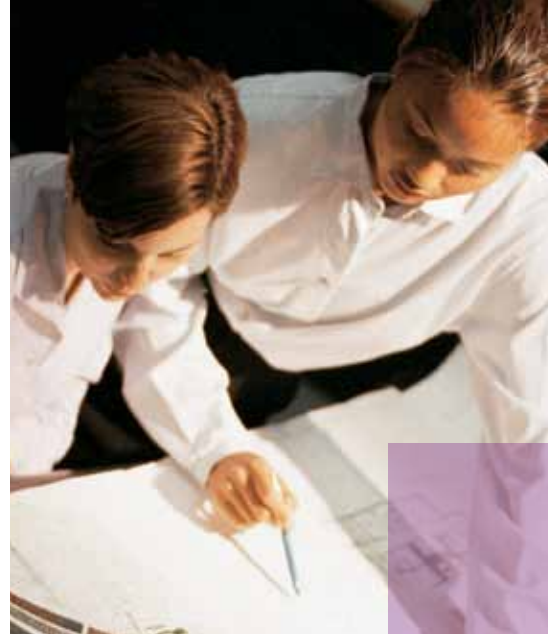
Issues Identification Worksheet

Step 1: Describe the facts of what occurred.

Step 2: Describe the various emotions experienced at the event or as a result of the event. This may include emotions, feelings, moods, attitudes, and behaviours that the other party might have displayed or experienced.

Step 3: Identify the areas where the guide might add the most value in questioning and explaining the context of what was experienced.

Step 4: Guide and intern work together to formulate several questions to find out why (see step 3), or to identify what can be done as a next step in resolving the issue under discussion.



<p>1. Present issue/description of the event:</p>	<p>3. Identify (with the guide) key points of context, such as: What is going on in the environment that makes this issue important?</p>
<p>2. Associated behaviours experienced with self and others:</p>	<p>4. Key questions to explore with my guide:</p>





What to do if the Relationship is not Working

Not all relationships will be perfect, all the time. This is to be expected. In any new relationship, there is an initial period of discovery that may be awkward. It is important to work together to find what is causing the discomfort. To build or repair a relationship, follow these steps:

1. Review your relationship expectations.
2. Review your values and the values of your guide. Is the issue related to a fundamental difference in your values systems that cannot be bridged?
3. Review the logistics and commitment. Is it a timing/availability/location issue that can be worked out?
4. Review the Learning Goals and Licensure Assistance Accord. Have the learning goals or other elements of the relationship changed in such a way so as to impact the relationship?

Dissolving the relationship

Should you both decide to bring the relationship to a close, make contact with the licensure assistance program coordinator and outline a transition plan.

What to do next

- Contact your licensure assistance coordinator to establish a transition plan and request a new match.
- Take the time to thank your guide for the guide's efforts.
- Be clear about your needs, to assist the licensure assistance coordinator with finding a new match for you.
- Begin the new relationship as a fresh start and enjoy learning.

3. Other Useful Tips

From: jgrant@aaa.com
Subject: Introduction and request for information Bio-Engineering in Mississauga
Date: March 10, 2010
To: CEM@bbb.com

Dear Ms. Mark:

I am in need of information on a Quality Control process for a bio-engineering product I am working on.

Joe Smith at ABC suggested you may be able to provide me with information on...

Thank you for your time and I look forward to hearing from you.

Yours truly,
Jane Grant

(416) 999-2222
jgrant@aaa.com

This section provides practical tips on building and managing relationships with the support of technology—online, email and telephone.

The Written Word: Email Etiquette

Email, telephone and “chat” are all used in relationships where distance and convenience present an obstacle to spending time in person. There are several concerns to be managed:

- **Confidentiality:** Email is NOT confidential. Be aware that what you send in an email can be forwarded to others; company email systems track all incoming and outgoing email; wireless users can and will pick up unsecured email. Be thoughtful about what you write in your email.
- **Writing style:** Take the time to convey your thoughts clearly. Treat email as a business letter. Use proper words (not “u” for you) and spell check your document. Use grammar correctly.
- **Use the “subject” line** to identify the key point or request (see sample provided).
- **Requests for information:** Keep the request simple and focused on one area at a time.
- **Place your request in your opening line** followed by a background paragraph.
- **Allow 24 to 48 hours to respond** or for a response.
- **Provide your contact information in your “signature”**, phone number and email address.
- **Use the telephone when information is sensitive.** Any message that is an expression of feelings and emotions is best presented in person or over the telephone.



Online Licensure Assistance Relationships

Email, telephone “chat” are all modes of establishing a relationship where distance and convenience present an obstacle to spending time face-to-face. To build a trusting relationship, there are practical concerns to be managed.

The most significant are:

- **Confidentiality:** Email is NOT confidential; some organizations do not support personal use of email; it is very easy for ordinary computer users to innocently pick up private messages through wireless transmissions. A knowledgeable hacker can monitor and publish a sensitive email from a “secure” line.
- **Writing styles:** How a person communicates depends on the person’s ability to convey thoughts and feelings in written format. Thoughtful writing will miss spontaneity and poor writing can result in misunderstandings and conflict. There will be times when providing a definition of words and terms will be important to how you convey your message.
- **Responsiveness:** How long one takes to respond and how timing is perceived impact relationship development.
- **Trust:** It can be a challenge to develop trust to the required level for a learning relationship to take hold. Some find an online environment easier; others find it more difficult.
- **Text vs. face-to-face cues:** It is a challenge to capture the nuances and fine emotion communicated in fractions of a second by a movement of the body. A text message receiver will often transfer their own emotions to create the missing meaning in the words they receive—for example, if the receiver is having a difficult day, the message may be interpreted as infused with negative meaning.
- **Issues and problem exploration:** Well defined, focused issues that have timing leeway for exploration, thought and reflection are suited to email. Complex, multi-dimensional, and relational issues are best suited to face-to-face or telephone discussion and exploration.
- **Learning reinforcement:** Follow-up to a program or course discussion that began in a face-to-face exploration is an effective means of using electronic means to support your relationship.



Online Relationship Guide

- Get to know each other:
 - o Share information about yourself as a first step. Exchange your **Getting to Know Each Other** worksheet. Getting to know each other on a personal level will go a long way to building rapport and trust for your relationship.
- Have a learning plan:
 - o Write about your career history.
 - o Identify why you entered the licensure assistance program.
 - o Consider that each of you is a learner. Clearly outline the goals you have for the relationship, what you hope to gain and to offer. Share the **SMART Goals** worksheet, or **Learning Plan** and **Licensure Assistance Accord**.
- Establish clear guidelines:
 - o How often will you communicate? Some people are highly proficient with technology and use email as a significant mode of keeping in touch; others are occasional users and may not be as familiar with current communication protocols.
 - o Identify the acceptable time for responses; some people expect frequent messages, others like a few days to reflect before responding.
 - Allow 24 to 48 hours to respond.
 - Agree that if one has not responded by an agreed time, the message will be re-sent since the other is assumed not to have received the message.
 - Give each other the benefit of the doubt; the other party may have a system failure, spammed-out, address change, or change in life circumstances.
 - Don't take a lack of response personally; it frequently isn't personal at all.
 - o Use tools to identify issues. Use tools such as the **Issues Identification** worksheet and **Meeting Agenda**.
 - o Identify what will be discussed by telephone and what will be explored via email. Early relationship development merits as much personal contact as possible—ideally face-to-face. You may plan to meet at a conference or an association event. Where distance and time don't support face-to-face, take the time to connect over the phone early in the relationship to accelerate the building of trust.
 - o Establish Confidentiality and the Licensure Assistance Accord
 - Use the **Licensure Assistance Accord** as the focus for the content of relationships.
 - Keep to one issue at a time in messages.
 - Use the **Issues Identification** worksheet and **Meeting Agenda** models to provide a structure to messages.
 - Keep messages brief for ease of reading.

- o Establish how you will handle sensitive issues.
 - You may determine sensitive issues are not appropriate for email-based relationships and set a time to meet over the telephone or in person.
- o Establish how you will address ethical dilemmas.
 - Follow PEO's guidelines for ethical issues.
 - Spend some time identifying other risks that may arise and how you might address them.
- o Discuss writing styles.
 - The quality of a relationship may depend on the quality of the writing. The better someone is able to express themselves in words, the more the relationship will deepen. Some people are eloquent and take great pride and joy in using words to express their thoughts, feelings and ideas. Some will say they prefer and find an online relationship more rewarding than face-to-face. Other people have difficulty expressing themselves in text and may be misunderstood.
 - Style also impacts the relationship development. Concrete, abstract or emotional expression, complexity of vocabulary and sentence structure, how thoughts are organized and flow, these all reflect your personality style and influence how others react to you.
 - Take the time to consider how to communicate the finer nuances of your experience.
 - Where emotion is charged, take time to reflect and let time be a leveling influence. Don't respond emotionally to an emotional situation.
- The mismatch:
 - o It is possible you determine there is a mismatch and are not in a position to assist the learning of the other. In this event, agree on a "no-fault" retiring of the relationship.
 - Reflect on what you learned about yourself in the relationship;
 - Determine what guide/intern selection criterion needs to change to create a more effective match;
 - Thank the other for their time investment.
- Establish frequency of contact:
 - o Successful relationships need frequent contact and commitment to build trust. When trust is established, real learning and important issues are brought forward for exploration and feedback.
 - o Set a guideline for contact of once a week.



Telephone and Voice Mail Etiquette

Using the telephone is one of the most important aspects of how a positive (or negative) impression is made in building relationships—for establishing a relationship, or generally in the workplace.

Six tips

1. State your name slowly and clearly. Voicemail and answering machines distort sound; please state your name slowly.
2. Spell your name. If you have a complicated name, or one that can be spelled many different ways, take the time to spell it for the other party.
3. Answer the phone with a clear HELLO.
4. In a business setting, it is appropriate to answer the phone:
 - o Hello, you have reached Catherine, how may I help you?
 - o Hello, you have reached Abdul in Engineering, how may I help you?
5. Leaving a voice mail message, speak slowly and clearly:
 - o Hello, John, this is Abdul, from Engineering, my phone number is: 416-111-2222.
 - o I would like to speak with you about the meeting agenda for Friday.
 - o Please call me back on Wednesday.
 - o Again, my name is ABDUL and my number is 416-111-2222.
 - o Thank you.
6. Your personal voice mail message needs to be clear. Speak slowly:
 - o Hello, you have reached Gretchen at 416-222-1111.
 - o I am not available to answer your call right now.
 - o Please leave a message and I will return your call within one business day.
 - o Thank you.

"Throughout the centuries there were men who took first steps, down new roads, armed with nothing but their own vision."

Ayn Rand

4. Managing Diversity

This section provides several tips on supporting diverse individuals in a relationship. Being open to exploring and learning about the other person's needs adds richness to the relationship.

Cross-cultural Awareness and How to Manage Differences

Interns and guides are asked to build a relationship—one that focuses on the intern's developmental needs. Part of those needs will be a discussion of values, beliefs and personal styles. When a guide and intern have a natural alignment, it is easier to build and maintain a relationship. **When a guide and intern have different values, beliefs and personal styles, the differences can be a valuable source of learning or roadblocks to forming an effective relationship.**

There are times when it is highly desirable to seek out or be matched with a guide who is considerably different from you. Differences will cause you to take a step back and reflect on your own values, beliefs and style. This reflective process will deepen and broaden your perspective. To deal with differences that form roadblocks to a relationship, a model for building communication and understanding involves **awareness, knowledge, and skills to adjust**. For example:

Awareness—When someone is speaking or behaving contrary to your expectations, it may simply be due to their own cultural norms of behaviour and language interpretation. It is important to ask questions to clarify what the behaviour and language means.

Knowledge—When you apply some of your own understanding of cultural and interpretive

differences, knowledge comes into play. You can describe and compare how things worked in the other culture you lived and worked in.

Skills to adjust—Your awareness that cultural differences exist and your knowledge that you each may be acting in a culturally specific way give you the skills to adjust. You will need to determine if a culturally specific way of acting is creating a roadblock to success and create a path to overcome this roadblock. Apply skills in open communication and non-judgmental listening to work through the issues.

Areas to explore

- The meaning of time and how time is managed
- What is considered conflict and how it needs to be addressed
- The role of hierarchy and what that means in the Canadian context
- How decisions are made
- What is accountability; who is accountable for what, and when?
- How problems are identified and how they are solved
- How people are approached when a problem or issue arises that has potential to be contentious or lead to conflict
- How praise is offered and what it means

Licensure Assistance as a Mature Engineer

Engineers arriving in Ontario from other countries and provinces bring a different set of needs to a relationship. They may bring particular experiences and a wealth of understanding of how things worked and the principles of operations from other places. It is quite possible an internationally educated graduate may be matched with a guide who is younger than they are or from a different cultural background. You will be learning from each other.

Exploring your differences will enhance your learning and be valuable as you work to integrate effectively in Canada.

- Question and explore differences in depth to understand the underlying reasons things are done a certain way.
- Question and explore the differences in how time is managed and the implications for effective decision making.
- Question and explore the differences in approaches to ethics.
- Question and explore how relationships are managed.
- Question and explore the life and career impact of becoming a professional engineer in Ontario.
- Learn about different processes, innovations and ways of thinking from other parts of the world and Canada.
- Engage in discussions about how to manage conflict and differences of opinion in the workplace and how to address issues in meetings and in private.
- Explore workplace integration issues such that you become an effective member of your workplace team.
- Ask for guidance in how to build strong relationships with customers, colleagues and superiors in the workplace; find out what is important to be successful.



“PEO became an institution that is aware about the difficulties professional immigrants are facing when coming to Canada and that has taken a step to help them realize their dreams and integrate them into the society”

Christian Chivoiu (Intern)

Licensure Assistance with Boomers

The baby-boom generation, now aged 48 to 67, represents the largest pool of potential guides in the workforce. They grew up with a strong work ethic and have been described as a group with a “do it for the team” attitude to be successful. Success in their careers was important and they have the rewards and toys to demonstrate it: houses, cottages, cars, ATVs, vacations, providing the best education for their children (the millennials) and the list goes on.

Many describe boomers as the “live to work” generation (where millennials have been described as the “work to live” generation). Even as boomers near their traditional retirement years, they have no plans to slow down—adventure vacations; active volunteering; another degree; second, third and fourth careers are all in their plans. Anything is possible and they know how to work to get it. They paved the way of social change, economic change, cultural awareness and globalization, and built the platforms of all the technology the newer generations are embracing with gusto. They have tried many things, had many experiences, and have learned lessons along the way.

They value new friends, learning, and doing work and volunteering connected to a life purpose.

They have a lot to offer, and they want their interns to tap into the wealth of their experience and to learn from them.

Interns need to take an active role, through setting schedules, bringing questions to explore and regular follow-up. Your guide wants you to take the initiative—call, ask, explore; it is all there for you.

Take time to:

- explore how your guide has experienced workplace change over their career;
- find out about the hidden rules of the workplace and how to get things done;

- find out how to build networks and relationships that are meaningful and will serve you well through the entirety of your career; get beyond social networking websites;
- find out why organizations function the way they do;
- build understanding of relationship dynamics and power structures in organizations;
- focus on building your communication skills. Develop professional behaviour. Learn how to prepare for and behave in meetings and build alliances across projects;
- learn that success is “all about the customer”. Learning early in your career the importance of understanding customer needs sets a stage for long-term career success.

5. Career Development Tools for Guides and Interns

This section provides career assessment and learning planning tools. You may wish to use several or all the tools to support formulating your learning goals. Use what you need, when you need it, to address the matter at hand. The guide's tools are not provided in the *Intern Handbook*, so the numbering of tools begins with #4.



Note on using the tools.

Having an appreciation for who you are is essential for building trust, exploring, problem solving, giving and receiving feedback, and preparing the **Learning Plan** and **Licensure Assistance Accord** (page 59).

The tools are designed to meet the needs of different learning preferences and may supplement other career assessment and performance development tools you might be using in your workplace. You and your guide may choose to use any tool to assist you with setting and achieving your licensure assistance learning goals.

Tools are identified as Tools for Guides and Interns, and Tools for Interns.

All tools are numbered and may be downloaded from the website.



Tools for Guides and Interns

4. Self-Exploration Lifeline Review and Identifying My Core Strengths

Taking the time to think through your history, knowing your needs and creating goals are important for your success.

Becoming clear on your needs may involve several steps:

1. Guide Competency Scan
2. Self-Exploration Lifeline Review
3. Identifying Core Strengths and Clarifying What I Would Like to Develop
4. Values Exploration
5. Creating Learning Goals Using SMART or Learning Plan

Step 1: Lifeline Review

Draw a line across the page as a representation of your life from your earliest memory as a child until today and project into the future.

On one side of the line, mark the significant points of your life along the line—these points need to be meaningful to you and signify such things as **accomplishments** (such as getting perfect in your first spelling test, being selected for the soccer team, purchasing your first home, saving the company money, contributing to a patent, etc.); **disappointments** (having to move and leaving your best friend, loss of a big contract); **significant events** that had an impact on or shaped who you are today (marriage, divorce, getting a job in another city and having to move, moving to Canada); **important relationships** (the birth of a child, loss of a grandparent).

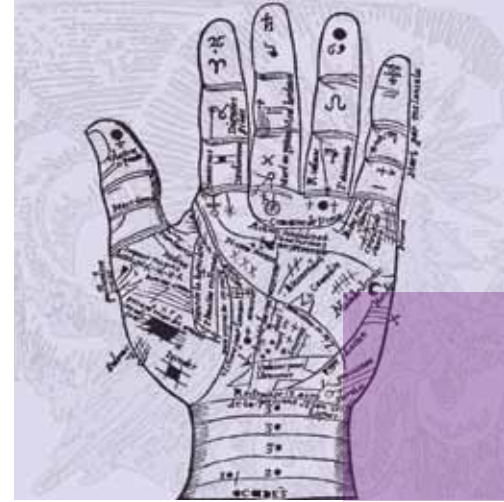
On the opposite side of the line, mark the skills and abilities you used that helped you accomplish what you accomplished, or helped you manage the difficulties along the way.

Identify the people who helped you in your life journey—these people are often informal guides.

What have you learned about yourself?

Continue the trajectory (line of your life) and forecast into the future—where do you see yourself headed and identify your goals.

Draw your lifeline here



Step 2: Identifying Core Strengths

Review your **lifeline** from Step 1; identify the strengths you have developed over your life.

Review your **work/volunteer/career history**; identify the strengths you have developed and write a statement that demonstrates how you have applied this strength in your work.

Review your **education and professional development**; identify additional strengths you have developed and write a statement that demonstrates how you have applied these strengths in your work/career.

Life Strengths	Summary of Core Strengths Work/Volunteer/Career Strengths	Education & Professional Development Strengths

Step 3: Clarifying What I Would Like to Develop

Review your lifeline again, and reflect on those areas you would like to develop.

To Develop	How Can Being an Intern Help Me Develop?

Continue in the next section on Values Exploration, prior to establishing your goals.

5. Values Exploration

Choose the top six to eight values that are important to you and influence your decisions.

Value	Definition	Describe How I Live That Demonstrates This Value (or would like to but aren't at present)
Considerate	Sensitive to the needs of others	
Identity	Sense of belonging to a group, service, community	
Tolerance	Accepting others as they are	
Academic Standing	High regard for scholastic and professional designations	
Integrity	Honesty and standing up for one's own belief	
Financial Independence	Being informed about business conditions; being free to choose in financial/lifestyle	
Risk	Being able to take risks	
Routine	Having a clear idea of what is required every day	
Variety	Having something different to do every day	
Power	Having influence over one's own future	
Logic	Rational, orderly, objective	
Sociability	Social interaction, companionship	
Self-respect	Liking who you are	
Health	Being healthy and leading a healthful lifestyle	
Lifestyle	Making choices that are meaningful to you; balance	
Recognition	Being recognized for accomplishments	
Competition	Having the opportunity to compete	
Achievement	Setting and achieving goals	
Adventure	Trying and doing things differently	
Personal Development	Being the best you can be	
Creativity	Thinking and acting creatively; trying new ideas	
Independence	Freedom to make decisions	
Trust	Believing in and supporting a relationship	
Accountability	Being responsible for one's own behaviour	
Others:		

Tools for Interns

6. Intern Self-Assessment–Preparedness for Licensure

Note for interns: the intent of this activity is to give you an idea of your strengths and needs. It helps you to prepare a quick summary of yourself to discuss with your guide.

I see the value of the P.Eng. licence as encompassing the following:

I have a clear understanding of PEO's requirements for licensure process

☐ Yes ☐ No ☐ Not Sure

I know where I stand in the process

☐ Yes ☐ No ☐ Not Sure

I require assistance in preparing for the next step in the licensing process

☐ Yes ☐ No ☐ Not Sure

Indicate the assistance you require and your plan to get it: _____

I would like assistance in preparing to write the Professional Practice Examination (PPE)

☐ Yes ☐ No

I anticipate difficulty in writing and passing the PPE.

☐ Yes ☐ No

I know what materials/textbooks to acquire for study

☐ Yes ☐ No

I know where to obtain this study material

☐ Yes ☐ No

I am satisfied with the level of engineering experience I am acquiring

☐ Yes ☐ No

If no, please elaborate: _____

I would benefit from guidance on how to go about gaining more responsibility in the work place to enable me to obtain the necessary acceptable engineering experience for licensure.

☐ Yes ☐ No

The guidance should encompass the following: _____

My long-term career goal includes: _____

Skills necessary to achieve my goal are: _____

I lack: _____

How I see licensure assistance helping me achieve my goals: _____

7. Intern Licensure Process Skills Scan

Instructions: The following skill areas are those that are assessed in the licensure process. Rank your learning needs using the scale where 1= lowest area of need to develop, to 5= highest area of learning need (I want to develop this the most). Use this tool as part of your process to create your Licensure Assistance Accord and Learning Plan.

You are responsible for securing the resources you need to prepare for your licensing process.

NEEDS/SKILLS		POOR				GOOD
		1	2	3	4	5
Section 1 Licensing Process	Knowledge of PEO's requirements for licensure					
	i) Writing PPE - Aware of time to write exam - Aware of available study materials and how to obtain					
	ii) Annual EIT Experience Review - How to prepare summary (acceptable format) - When and how to submit summary - How to process and respond to feedback from PEO					
	iii) Understanding ERC Process (Applicants in ERC Process) - Confirmatory exams - ERC Review					
	iv) Preparing Experience Record					
	v) Understanding Referee Process					
Section 2 Experience Related	A. Application of Theory					
	• Analysis					
	• Design and synthesis					
	• Testing methods/implementation methods					
	B. Practical Experience					
	• Understanding of Codes/Standards					
	• Understanding the limitations of practical engineering					
	• Experience in the significance of time in the engineering process					
	C. Management of Engineering					
	• Planning/scheduling/budgeting					
Section 3 Leadership	• Team building/ability to motivate					
	• Handling conflict/changes					
	• Project control/risk management					
	• Dealing with clients/customers					
	D. Communication Skills					
	• Preparing written work					
	• Presentations of oral reports					
	E. Understand the Social Implications of Engineering					
Section 3 Leadership	Leadership qualities					
	i) Understands and promotes the value of professional licensure					
	ii) Institutes change/motivates others					
	iii) Demonstrates self-confidence/initiative					
	iv) Able to lead/direct others					



8. Intern Learning Competency Scan

- **Listens actively:** You demonstrate active listening by asking relevant questions at the appropriate time. Actively listening conveys a message of respect for the communicator and what is being communicated. Taking action and following through on advice or corrective feedback demonstrates this quality.
- **Takes initiative:** Your guide will be more disposed to helping you and going the extra mile if the guide sees you initiate activities and ideas for assignments.
- **Follows through:** This indicates you value your guide's advice.
- **Learns quickly:** Displaying a desire to learn as quickly as possible conveys enthusiasm and will undoubtedly motivate your guide to go beyond what is expected.
- **Willingness and ability to accept corrective feedback:** Giving and receiving feedback is essential in an effective relationship. The encouragement you receive from your guide will be more valuable if your guide also provides feedback. Encouragement without feedback will make for an unrewarding and ineffective relationship.

Take a moment to assess your level of competence in each area. Work to develop those areas you identify at the lower end of the scales.

	Could Improve		Good		Excellent	
Listens actively	0	1	2	3	4	5
Takes initiative	0	1	2	3	4	5
Follows through	0	1	2	3	4	5
Learns quickly	0	1	2	3	4	5
Accepts corrective feedback in a positive manner	0	1	2	3	4	5

9. Create Learning Goals Using SMART

After determining your readiness to engage in a licensure assistance relationship, take time to assess your strengths and developmental needs. Now you will be ready to create your learning goals using SMART.

S–Specific. The clearer the goal and more easily understood it is for you and others (such as your guide), the more likely it will be accomplished. Complex goals need to be broken down into steps or smaller goals to ensure success.

M–Measurable. Goals need to be measurable so you know you are making progress and have achieved them. By being measurable, the process for developing the skill or capability will be easier to define.

A–Attainable. To ensure success, goals need to be realistically attainable. Keep in mind you are continuing your work and other activities in your life. Lofty goals that cannot be achieved within three to six months will often not be achieved. Break the goals down into steps or smaller goals that will generate results in short time frames. This will help keep momentum going toward achieving larger goals. In this section, identify the method that you will use to meet the learning goal.

R–Results. State the goal in terms of the expected outcome. Outcomes can include both measurable and intrinsic outcomes.

T–Time-bound. Setting a short time line for making progress against a goal will significantly increase the likelihood of achieving the goal. A time limit provides a focus for activity.

Specific	
Measurable	
Attainable	
Results	
Time-bound	

10. Finalizing a Learning Plan

In your first meeting, you will establish the **Licensure Assistance Accord** (Tool 19). This sets the parameters for the relationship and the work you will be doing together. What you will work on together forms the **Learning Plan** (Tool 11).

The Licensure Assistance Accord and Learning Plan are the foundation documents for an effective licensure assistance relationship.



Some interns may spend considerable time and effort reviewing their background, competencies, capabilities and going through self-assessment processes. Equally, they may have a fully prepared draft of their personal learning plan for review and finalization with their guide at their first meeting.

Other interns may need to enter a licensure assistance relationship specifically to gain clarity and establish measurable goals. The **Creating Learning Goals Using SMART** (Tool 9) provides a framework for creating clear, measurable goals.

The first two meetings are critical in defining your goals and finalizing the **Learning Plan** (Tool 11). You and your guide develop the goals and Learning Plan together.

Immediate goal: Provides a snapshot of the learning goal that can be easily understood by others.

Interim objective and long range goal: Provides a broader context and detail that can be measured and understood by others.

To achieve my goal I must do the following: The means by which the learning is to take place.

Actions taken: Provides a means of tracking progress and achievement.

Relevance to PEO licensure and evidence: Provides a direct connection to the licensure process.

11. Learning Plan

Name: _____ Date: _____

Immediate Goal: _____

Interim Objective: _____

Long Range Plan: _____



To achieve my immediate goal I must do the following:	Actions taken towards achieving goal	Relevance to PEO licensure Evidence
1.		
2.		
3.		
4.		
5.		

To achieve my interim goal I must do the following:	Actions taken towards achieving objective	Relevance to PEO licensure Evidence
1.		
2.		
3.		
4.		
5.		

To achieve my long range plan I must do the following:	Actions taken towards achieving goal	Relevance to PEO licensure Evidence
1.		
2.		
3.		
4.		
5.		

Notes

6. Licensure Assistance Meeting Planning & Journal

This section contains working documents to support the ongoing licensure assistance relationship. An agenda to plan for meetings will help maintain momentum. Journals to capture assignments, learning, insights, ideas, and the like are useful for keeping track of your progress.

Notes for interns on the ongoing setting of the agenda

Setting the agenda is your responsibility. For the best use of precious time, it is recommended an agenda be prepared in advance. Take responsibility for sending your guide a completed agenda for your meetings.



This does not mean there is no room for spontaneously exploring hot issues! The agenda is to provide focus and maximize the contribution from your guide. Gaining your guide's views, asking questions, and getting feedback are vital to the process.

It is important to have a **comprehensive Learning Plan and Licensure Assistance Accord** that you **review with your guide at regular intervals (three months and five months)**. Make adjustments to the learning goals and plans as you make progress.

1.

First Meeting: How to Get Started? Discussing Learning Goals and the Licensure Assistance Accord

Establishing the **Licensure Assistance Accord** in your first meeting is the priority. An accord provides focus, and establishes a set of parameters of how you both would like the relationship to develop. In some instances, the Learning Plan and Licensure Assistance Accord will be introduced at the first meeting and finalized in the second or third meeting.

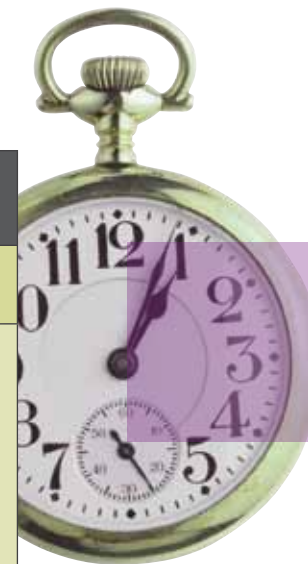
How quickly these accords are finalized will depend on such factors as the extent to which you have undergone a self-assessment, how familiar and far along you are with your progress on PEO licensure, and how clearly developmental goals have been articulated.

Recommended time: 60 minutes.

For the first meeting:

- confirm agenda/objectives for meeting;
- provide your guide with background information, such as a résumé or profile;
- prepare learning goals/SMART goals;
- discuss how you would like to work together;
- discuss what is not discussable;
- set time schedule for meetings (email, telephone, face-to-face);
- set next meeting;
- set the next Agenda.





12. Meeting #1 Agenda

Use this agenda to keep track of your notes

Date/time:

Location:

Agenda items:

- Check-in
- Getting to know each other
- Review each other's backgrounds
- Establish the Learning Plan
- Create Licensure Assistance Accord
- Check-out

Key topics:

Issues addressed:

Notes to follow up before the next meeting:

Next meeting:

2.

Second Meeting: Exploring Each Other's History

Recommended time: 30-60 minutes.

For the second meeting:

- confirm agenda/objectives for meeting;
- provide your guide with background information, such as a résumé or profile;
- finalize the Licensure Assistance Accord;
- explore how background experiences support or will support learning goals;
- begin addressing issues;
- discuss and fine-tune how you would like to work together;
- set next meeting Agenda.



13. Meeting #2 Agenda

Use this agenda to keep track of your notes

Date/time:	Location:
Agenda items:	
Key topics:	
Issues addressed:	
Notes to follow up before the next meeting:	
Next meeting:	



3.

Third Meeting: Finalizing the Learning Plan and Licensure Assistance Accord

Recommended time: 60 min.

For the third meeting:

- confirm agenda/objectives for meeting;
- bring forward issue for exploration;
- finalize the Learning Plan;
- finalize Licensure Assistance Accord;
- assign inter-session “homework” or assignments and follow-up process in a Learning Journal;
- confirm next meeting;
- set Agenda for next meeting.



14. Meeting #3 Agenda

Use this agenda to keep track of your notes

Date/time:

Location:

Agenda items:

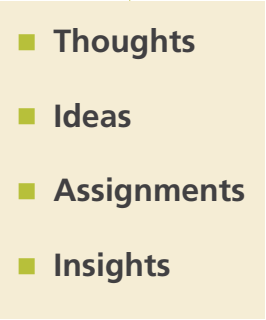
Key topics:

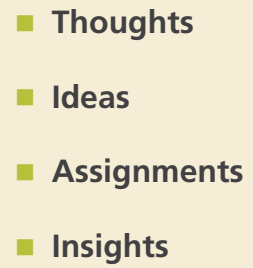
Issues addressed:

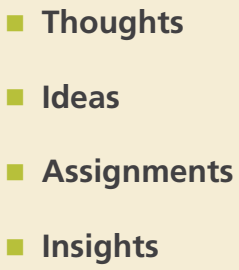
Notes to follow up before the next meeting:

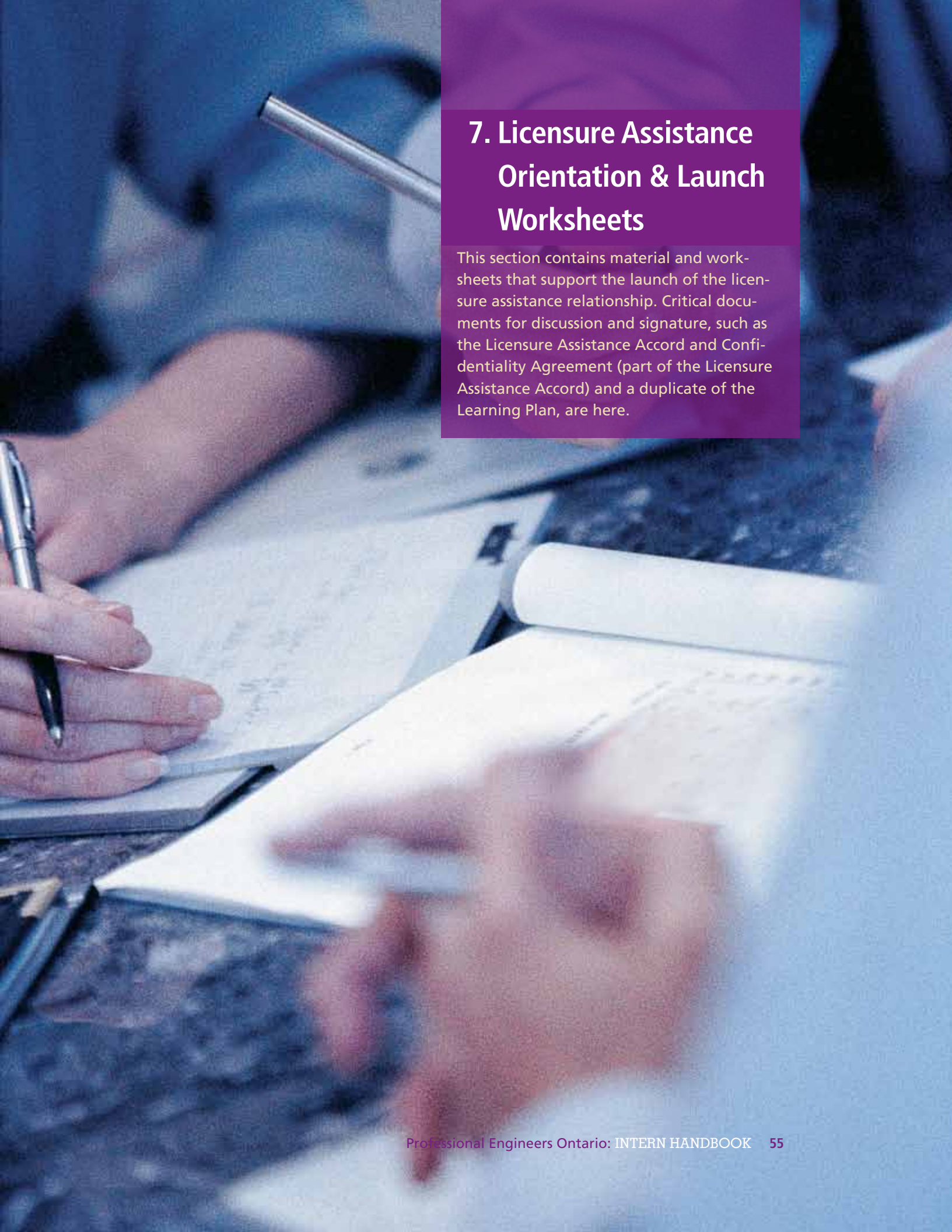
Next meeting:









A background image showing a close-up of hands writing on documents. One hand is holding a pen and writing on a document, while another hand is holding a pen and writing on a document. The documents are white and have some text on them. The background is a soft, out-of-focus blue and white.

7. Licensure Assistance Orientation & Launch Worksheets

This section contains material and worksheets that support the launch of the licensure assistance relationship. Critical documents for discussion and signature, such as the Licensure Assistance Accord and Confidentiality Agreement (part of the Licensure Assistance Accord) and a duplicate of the Learning Plan, are here.

16. Worksheet: Getting to Know Each Other

When guides share their background with their intern, they build the needed trust to learn from each other. The following exercise is provided to assist you to begin establishing a relationship with each other.

Share and discuss:

What are some of the highlights of my personal life that would be useful to share, as it is part of who I am?

What are some of the highlights from my work and education history that would be useful to share, as these set the foundation for the work I do?

What are some of the highlights of my experiences in the Canadian work environment that would be useful to explore in preparation for guiding internationally educated professionals (for example: understanding the nuances of the hiring process; how to be an effective member of a team)?

How have guides or role models made a difference to me in my career in the past?

What are some of the hopes I have for this program?



17. Risk and Risk Mitigation Strategies

Risk	Risk Mitigation Strategies

18. Code of Conduct and Program Operating Principles

Program Design Principles

- Meet the needs of a diverse and geographically dispersed membership.
- Guides and interns are volunteers.
- Licensure assistance relationships are built outside the workplace.
- Licensure assistance relationship interactions can be by email, phone, or face-to-face.
- PEO chapters play an important role in promoting licensure assistance, matching and preparing guides and interns for their relationship.

Relationship Principles

- Guides and interns create a Licensure Assistance Accord for their relationship—length, time, frequency, intensity, mode, etc.
- Both parties have the right to end their licensure assistance relationship at any time.
- It is a professional relationship based on trust and confidence, all discussions are confidential—information shared is to be determined by both parties.
- Interns take the lead in scheduling and planning for meetings in advance.
- Interns bring topics and issues forward for discussion.
- Both parties are learners and contributors.

Adult Learning Principles

- Adults need to be involved in planning and evaluating their professional development.
- Experience, including mistakes, provides the basis for learning activities.
- Adults are most interested in learning about subjects that have immediate relevance to their jobs or personal lives.
- Adult learning is problem-centred rather than content-oriented.
- Interns and guides find maintaining a learning journal is a useful means of achieving insight.

Guide/Intern Rules of Engagement and Ethical Conduct

- Guide and intern have the right to decline the match.
- The relationship is professional.
- Confidentiality is paramount for building trust.
- Interns are responsible for time management: planning meetings, follow-up, being prepared, and starting and ending on time.



19. Licensure Assistance Accord

We, the undersigned, agree to enter into a licensure assistance/learning relationship. As a licensure assistance relationship, the intern is responsible for the intern's own learning as one component of the intern's experience and education journey to becoming a professional engineer with all the rights and responsibilities associated with the professional designation. It is understood the guide is a learning resource for exploration, sharing of experiences and assisting the intern with achieving insight and learning from experiences.

Intern name:	Date:
Guide name:	
Intern general learning goals:	
Specific soft skills to practise and develop:	
Expertise (qualifications and credentials) to develop:	
Intern needs and expectations:	
Guide needs and expectations:	
How will we deal with conflicts as they occur?	
How will we bring our relationship to a close?	
How will we meet and manage our relationship (once a month for six months: in person, email, phone...)?	
<p>Confidentiality: In signing below, we agree not to divulge any confidential information we may share with each other during the course of our licensure assistance relationship, or any other time thereafter. Release: We acknowledge that PEO's role is simply to facilitate the forming of licensure assistance relationships and we release PEO from any liability that might be claimed from the use of these materials or from the licensure assistance relationship.</p>	
Intern signature	Guide signature



11. Learning Plan (duplicate)

Name: _____ Date: _____

Immediate Goal: _____

Interim Objective: _____

Long Range Plan: _____

To achieve my immediate goal I must do the following:	Actions taken towards achieving goal	Relevance to PEO licensure Evidence
1.		
2.		
3.		
4.		
5.		

To achieve my interim goal I must do the following:	Actions taken towards achieving objective	Relevance to PEO licensure Evidence
1.		
2.		
3.		
4.		
5.		

To achieve my long range plan I must do the following:	Actions taken towards achieving goal	Relevance to PEO licensure Evidence
1.		
2.		
3.		
4.		
5.		

Appendix: Sources and Resources

Professional Engineers Ontario (PEO): <http://www.peo.on.ca>

The Ontario Society of Professional Engineers (OSPE): www.ospe.on.ca

EngineersCanada: www.engineerscanada.ca/e/

P.Eng. licence application form: www.peo.on.ca/sites/default/files/2019-07/LicensingGuide%26Application.pdf

OSPE online application: http://ospe.site-ym.com/general/register_member_type.asp?

Clutterbuck, D., and G. Lane. *The Situational Mentor: An International Review of Competencies and Capabilities in Mentoring*, Gower Publishing: 2004, ISBN 0-566-08543-7.

Meggison, D., and D. Clutterbuck, B. Garvey, P. Stokes, R. Garrett-Harris. *Mentoring In Action*, Kogan Page: 2006, ISBN 0-7494-4496-7.

Mossop, C. *Cascade to Wisdom: A Field Guide for Mentors*, Sage Mentors Inc.: 2008, ISBN 978-0-9680623-1-9.

Mossop, C. *Cascade to Wisdom: A Field Guide for Protégés*, Sage Mentors Inc.: 2008, ISBN 978-0-9680623-1-9.

The Five Elements of Engineering Experience for Licensing

The five elements of satisfactory engineering experience for licensing purposes are:

- **Application of theory:** analysis, design, synthesis, testing, interpretation and implementation.
- **Practical experience and the limitations of real systems:** visits to engineering works or equipment, as part of a larger system.
- **Management of engineering:** planning, the significance of time, allocation of resources, identification of labour materials and overhead, team building, monitoring of expenditures and schedules, and risk assessment.
- **Communication skills:** written work, oral presentations, and presentations to the public.
- **Social implications of engineering:** awareness of potential consequences, both positive and negative, of a project, recognition of value to the public, safeguards to mitigate adverse impacts, role of regulatory agencies, and responsibility to guard against conditions dangerous or threatening to life, limb, property or the environment.

Notes

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Website: www.peo.on.ca