



Professional Engineers  
Ontario

# CEO/ REGISTRAR'S REPORT

SEPTEMBER 27, 2024



### INTRODUCTION

For over a decade, June 23rd has marked International Women in Engineering Day (INWED), an event that celebrates the achievements of pioneering women engineers around the world. This year, I had the honour of meeting with hundreds of women, both engineers and aspiring engineers, who shared their experience pursuing a career in the field of engineering. One of them shared with me that she was inspired to do so after attending a 30 by 30 Check-in meeting. Such stories encourage us to apply what we've learned from PEO's 30 by 30 initiative, especially in our relationship-building efforts with underrepresented and marginalized groups.

In 2022, Council committed to an Anti Racism and Equity (ARE) Code which would encompass all aspects of our work as a regulator, an employer, and an association with an active volunteer cohort. Our team has continued to make progress on an action plan that advances the Code's eight principles. This action plan includes activities and engagement initiatives for both internal and external audiences. The plan, together with the EDI Framework (see Appendix A), supports embedding Code principles into our future policy work for Council as well as our ongoing operations. I encourage councillors and stakeholders to review the full EDI Action Plan in the appendix of this report (see Appendix B).

We have made many significant accomplishments under PEO's current strategic plan. In 2023, at the behest of the government, our licensing processes became more fair and equitable through the removal of the Canadian experience requirement for licence applicants. In addition, through our gender audit, we have been identifying specific barriers women must overcome before they can be licensed. Our External Relations team continues to build and maintain connections with a vast network of stakeholders, including through recent discussions with Black Engineers of Canada, Women in Science and Engineering, and several newcomer and settlement agencies committed to assisting international engineering graduates. Internally, we are building an inclusive culture and learning from experts about the history and cultures of marginalized communities.

PEO is on a journey to create a culture of belonging so every engineer and aspiring engineer can see a place for themselves in the profession. As we move forward on our EDI journey, I look forward to sharing further progress with you.



On August 24, PEO staff attended the AGM and fireside chat of Black Engineers of Canada, which advocates on behalf of Black engineers.





Panelists who participated in a discussion moderated by CEO/Registrar Jennifer Quaglietta, MBA, P.Eng., ICD.D, at the launch of the Toronto chapter of the Council on Women in Energy & Environmental Leadership on July 17.



On August 22, CEO/Registrar Jennifer Quaglietta, MBA, P.Eng., ICD.D, was invited to attend a girls' STEM summer camp, where she shared advice with girls interested in pursuing an education or career in STEM fields.



On June 25, CEO/Registrar Jennifer Quaglietta, MBA, P.Eng., ICD.D was invited to speak at a Women in Engineering Day event organized by Siemens Canada.



On June 7, PEO co-hosted the Women in Engineering Summit at PEO's head office; Alberta's engineering and geoscience regulator, APEGA, co-hosted a similar event on the same day in Edmonton, AB.

**OPERATIONAL PLAN STATUS REPORT**

PEO’s Council-approved 2023–2025 strategic plan reflects a commitment to modernizing processes, improving governance, optimizing organizational performance and collaborating with stakeholders. In support of achieving goals within the strategic plan, PEO’s operational plan includes 21 initiatives for 2024. As of September 2024, 10 per cent of the initiatives have been completed, with an additional 80 per cent over half completed against progress plans for the year.

PEO has now passed the halfway mark in its current strategic plan. Staff are now preparing to support the development of PEO’s next plan, set to be launched in 2026. Beginning in the fall and throughout the spring of 2025, environmental scans and engagement activities will help inform development of the next strategy. Council will have the opportunity to review, debate and ultimately provide approval for an updated strategy in late spring 2025.

Goals	Sub Goals	Activities	Status			
			NYS	< half	> half	Done
1. Improve licensing processes	1.1 Create fair, transparent, accessible and efficient application process	1.1.1 FARPACTA tech solution - Phase 1 & 2				
		1.1.2 FARPACTA process (licensing and compliance)				
		1.1.3 Change management and communications				
	1.2 Review licensing processes; implement changes	1.2.2 Implement mandatory CPD - Phase 2 (business rules, sanctions)				
	1.3. Ensure licensing reflects EDI values	1.3.1 EDI - Phase 1 (audit, supports)				
2. Optimize organizational performance	2.2. Ensure adequate IT; data collection/mgt	2.2.1 Digital transformation roadmap				
		2.2.2 Data governance model				
	2.3 Review/improve comms & business processes; ensure reflects EDI values	2.3.1 Organizational EDI strategy				
		2.3.2 HR high performance team roadmap				
		2.3.3 Modernize payroll processes				
		2.3.4 Communications strategy (value, EDI)				
		2.3.5 Modernize budget processes				
		2.3.6 Review financial controls				
		2.3.7 Develop Customer Service Model				
3. Implement governance improvement program	3.1 Ensure councillor & ELT orientation	3.1.2 Review/revise board orientation				
	3.2 Ensure committee/council evidence for decision-making	3.2.2 RM framework				
	3.3 Establish metrics for governance performance	3.3.1 Review governance committee evaluations				
4. Refresh vision; ensure stakeholders see PEO value	4.1 Dialogue with members & stakeholders	4.1.3 Stakeholder engagement session(s)				
	4.2 Undertake research	4.2.1 Legislative/reg/legal review				
	4.3. Develop proposed vision for consultation	4.3.1 Draft new vision				
4.3.2 Post vision consultation						
Status Counts:			5%	5%	80%	10%

Figure 1: PEO’s Operational Plan Status Report as of September 2024

## IMPROVING THE LICENSING PROCESS

### 1.1 Create Fair, Transparent, Accessible and Efficient Application Process

#### 1.1.1 FARPACTA Tech Solution

Recent initiatives completed under PEO’s Digital Transformation strategy have helped enable real-time data collection, analysis and business intelligence of PEO’s legacy and FARPACTA-compliant processes. These improved reporting capabilities allow Licensing staff to prioritize objectives and continue to make data-driven, evidence-informed decisions with improved efficiency.

#### 1.1.2 FARPACTA Process (Licensing and Compliance)

##### FARPACTA-Compliant Process

As of August 5, PEO issued a total of 80 P.Eng. licences in the FARPACTA-compliant process and has received a total of 191 complete P.Eng. applications. The Licensing team continues to meet and even surpass the registration timelines as set out in FARPACTA legislation.

##### Legacy Process—Inventory Management Plan Update

As of August 19, the number of legacy applicants has decreased to 20,801, an improvement of 34,700 from its highest point in July 2023. Further, the number of applications awaiting academic assessment has decreased to 1107 files, an improvement from

4866 in August 2023. Most active legacy applicants are currently either writing technical exams or completing the NPPE:

- 4178 applicants writing technical exams;
- 5191 applicants have met academic requirements and are eligible to write or are currently scheduled to write the National Professional Practice Exam (NPPE).

Licensure timelines for these applicants depend on how long it will take them to complete their exams. We are confident that once legacy applicants write the NPPE and submit their competency-based assessment, the expected timeline for staff to issue a decision—late 2024—will be within the six-month period as laid out in FARPACTA.

PEO has also reduced the time for applicants waiting for a receipt from PEO that their experience requirements for licensure have been received, as well as confirmation that their validators or referees have submitted their responses. Average response times have dropped from 20 weeks to 12 weeks.

GROUP	CURRENT TOTAL	(%)
Academic Assessment	1107	5%
Writing technical exams	4178	20%
Met Academics (Writing NPPE)	5191	25%
Accumulating Experience—pending verification	623	3%
Accumulating Experience—active inventory	2426	12%
Accumulating Experience—inactive inventory	4118	20%
Other	3158	15%
<b>GRAND TOTAL</b>	<b>20,801</b>	<b>100%</b>

Figure 2: Inventory of Legacy Applicants



## 1.2 Review Licensing Process; Implement Changes

### 1.2.2 Implement Mandatory Continuing Professional Development (CPD)—Phase 2 (Business Rules, Sanctions)

In 2024, about 72,000 licence holders are required to complete the Practice Evaluation and Knowledge (PEAK) program. As of January 31, 51 per cent of eligible licence holders were in compliance. By August 15, 86 per cent of licence holders had started PEAK—with 82 per cent having completed their first two PEAK requirements and 4 per cent working towards completing those two requirements. We continue to see the numbers improve, with support from ongoing awareness campaigns via email, letter and phone calls.

We have committed to continuous improvement in the development of mandatory CPD. We expect the PEAK program to efficiently achieve its regulatory objectives and account for licence holder feedback. Adjustments include the simplification of rules and enhancement of user experience which will be demonstrated in a new, more user-friendly PEAK platform, to be launched in 2025. We are also developing processes and tools for compliance measures, such as administrative licence suspensions and compliance audits to help ensure that those licence holders who are required to complete their CPD obligations actually do so. We will be taking a 'facilitative' approach to compliance measures, with exemptions and/or extensions of deadlines granted where appropriate, and warning notices sent out well in advance of any suspensions being imposed. We also continue to collaborate with other regulators on strengthening and respecting our respective CPD programs and support our licence holders who are registered in multiple jurisdictions.

## OPTIMIZE ORGANIZATIONAL PERFORMANCE

### 2.2 Ensure Adequate IT; Data Collection/Management

#### 2.2.1 Digital Transformation Roadmap and 2.2.2 Data Governance Model

Throughout 2024, PEO has made significant progress on its Digital Transformation strategy. In alignment with evidence-based standards, we continue to strengthen our cybersecurity posture, through improved policies, practices and tools. Our business intelligence and analytics capabilities continue to improve at a rapid pace. This occurs through enhanced data warehousing and data insight capabilities, supported by improvements to our technology infrastructure. These transformative changes support PEO's modernization efforts. They are consistent with Council's 2019 Action Plan as well as various subsequent strategic plan initiatives.

#### 2.3 Review/Improve Communications and Business Processes; Ensure They Reflect EDI Values

##### 2.3.2 HR High Performance Team Roadmap

##### Individual Development Plans (IDPs) and Career Advancement

Learning and development opportunities help to keep employees engaged. They contribute to the retention of skilled staff and support increased productivity and improved performance. PEO's

# 86%

By August 15, 86% of licence holders had started PEAK

learning and development strategy includes education activities, mentoring and on-the-job learning, with a focus on EDI, cultural transformation, values, leadership competencies, and many other topics that relate to our work.

#### Employee Engagement

To date, 13 of 18 items in the 2024 employee engagement action plan have been completed, with the remaining 5 to be launched in the fall. PEO will continue to measure employee engagement to help support continued advances in staff productivity, retention and performance.

#### 2.3.4 Communications Strategy (Value, EDI)

We have completed an audit of PEO's communication practices and channels. The audit included feedback from PEO staff, Council, committee members, chapter leaders, association executives, licensing applicants, EITs and nearly 5500 licence holders. The recommendations are reflected in PEO's Action Plan (see Appendix C) and communication strategy. The audit outlined positive feedback on our communication channels, such as LinkedIn, *Engineering Dimensions* and email correspondence, and identified focus areas for improvement. For instance, we will be paying greater attention to Chapter communications. We will also make a more deliberate effort to develop and maintain relationships with key media contacts.

Significantly, in response to stakeholder feedback, starting in October, licence holders will once again have the option to subscribe to receive a print copy of *Engineering Dimensions*.

#### 2.3.6 Review Financial Controls

Having clear financial policies, including those pertaining to the management of expense reimbursements, is a key control for ensuring sound and defensible financial management. As such, a review of financial policies is in progress under the oversight of the Audit and Finance Committee, which will report to Council in due course.



### GOVERNANCE SCORECARD

The PEO Governance Scorecard plays a key role in the management and oversight of PEO's operational activities and priorities. This Scorecard reports on 12 quantitative indicators aligned to PEO's core functions of Regulatory Operations, Policy, Strategy and Finance, and Talent Management and Corporate Administration.

To support transparency and accountability, PEO recently updated the reporting frequency of seven annual indicators to a quarterly basis. The affected indicators are here: Mandatory PEAK Compliance Rate, 30x30 Licensure Rate, Updated Standards and Guidelines, Strategic

### REGULATORY OPERATIONS LEAN REVIEW PROJECT

As part of PEO's transformation to become a modern regulator, we are conducting a Lean review of PEO's entire Regulatory Operations division to identify improvement opportunities to improve our organizational effectiveness.

Through this project, we have documented the current end-to-end business processes for our core regulatory functions and developed business cases with performance measurements to streamline activities across our Licensing, Registration, Investigation and Complaints, Unlicensed Practice, Prosecutions, and Tribunal departments.

Participating staff received a half-day orientation on Lean methodologies to build upon our continuous improvement culture at PEO with the aim of strengthening value generating activities, reducing processing times, and improving performance excellence to better serve our applicants, complainants, respondents, and employees.

Currently, we are consulting with stakeholders which improvement opportunities to pursue and will start implementation of the approved opportunities as early as Oct 2024.

Initiative Completion, Year to Date Forecast Budget Revenue Variance, Year to Date Forecast Budget Spend Variance, and Staff Turnover.

The September 2024 PEO Governance Scorecard reports on the reporting period of January to June 2024.

For PEO's internal targets, six indicators are reporting as green for favourable against their target with two indicators reporting as yellow for slightly below target. The remaining four indicators are milestone-based in nature or are not reportable for this reporting period.

SEPT 2024 PEO GOVERNANCE SCORECARD - COUNCIL INDICATORS										Reporting Period: Q2 2024
#	Indicator Name	Operational Definition	Reporting Frequency	Category	Status	Desired Direction	2024 Target	2024 Threshold	Q2 2024 Value	Status Descriptions
1	Acknowledgment of Complete Applications Within Target (C), (F)	Number of received applications acknowledged as complete within 10 days divided by all applications received during the reporting period.	Quarterly	Regulatory Operations		↑	90%	80%	100%	All completed applications reviewed within 10-day period.
2	Registration Decisions Within Target (C), (F)	Number of P.Eng. and Limited Licence applications for whom a registration decision is made within the required timeframe divided by all registration decisions made during the reporting period.	Quarterly	Regulatory Operations		↑	90%	80%	96%	PEO continues to develop and implement process improvements to meet compliance requirements and improve staff processing times.
3	Registration Decisions Within Target – P.Eng. Transfers (C), (F)	Number of registration decisions made within 30 days for the P. Eng. transfer applications divided by all registration decisions received during the reporting period.	Quarterly	Regulatory Operations		↑	100%	90%	95%	The 100% target was set by the Ontario Fairness Commissioner, pending further modification. PEO has exceeded our internal target of 90% and continues to implement process improvements to meet the legislated compliance requirement.
						↑	90%	80%		
4	Mandatory PEAK Compliance Rate (C)	Compliance rate, expressed as a percent, for elements 1 and 2 of the mandatory Practice Evaluation and Knowledge (PEAK) Program. The program has three elements: 1) practice evaluation, 2) professional practice module, 3) the continuing professional development report.	Quarterly	Regulatory Operations		↑	90%	80%	82%	As referenced in the Continuing Professional Development section, the PEAK Program became enforceable as of 2024. We expect the completion rate will significantly increase towards the end of this year.
5	30x30 Licensure Rate (C)	Number of newly licensed female-identifying engineers divided by the total number of newly licensed engineers.	Quarterly	Policy		↑	30%	21%	21.1%	The 30 by 30 initiative was promulgated by Engineers Canada as a national goal of raising the percentage of newly licensed engineers who are women to 30 per cent by the year 2030. PEO supports this effort through Council's commitment to annually track and measure progress toward the 30 by 30 goal.
6	Updated Standards and Guidelines (C)	The percent of standards, guidelines and policies reviewed within the last five years.	Quarterly	Policy		↑	90%	70%	0%	The review of all six standards, guidelines, and policies scheduled for 2024 are progressing well and are on track to be reviewed by staff by the end of this year.
7	Strategic Initiative Completion (C)	The total number of strategic initiatives completed during the reporting period divided by the total number of strategic initiatives planned for the year.	Quarterly	Finance and Strategy		↑	90%	80%	10%	As referenced in the Operational Plan Status Report, over 80% of the 21 strategic initiatives are more than half complete and are progressing per schedule.
8a	Year to Date Budget Revenue Variance (C)	The variation, in percent, of the actual year-to-date revenue compared to the year-to-date budget.	Quarterly	Finance and Strategy		↑	0.1%	-10%	0.4%	Target and threshold are set to allow for the monthly spend variations in both revenues and expenses during the course of the year. Target values for indicators 8a and 8b have been updated to address a carryover error.
8b	Year to Date Budget Spend Variance (C)	The variation, in percent, of the actual year-to-date spend compared to the year-to-date budget.				↑	1.25%	-10%	10.5%	
9	Days Cash on Hand (C)	This indicator is calculated by first determining the total amount of unrestricted cash / cash equivalent funds available and dividing it by annual operating expenses minus depreciation expenses. This denominator is then divided by 365.	Quarterly	Finance and Strategy		↑	180	90	499	PEO has a strong financial position where the organization possesses cash on hand to sustain its core operations.
10	Employee Engagement Rate (C)	Engagement score is calculated by adding the agree and strongly agree scores and dividing it by the number of questions.	Annually	Talent Management and Corporate Administration		↑	68%	68%	N/A	Update to be provided after the reporting year has passed.
11	Staff Turnover (C)	The number of full-time permanent employees at the start of the reporting period minus the number of voluntary departures at the end of reporting period divided by the total number of full-time permanent employees at the start of the reporting period.	Quarterly	Talent Management and Corporate Administration		↓	15%	18%	2.3%	Turnover rate is lower than industry standard due to high employee engagement levels. The average voluntary turnover rate in Canada is 15.5% (Mercer 2023 Canada Turnover Trends).
12	Year-End Performance Review Completion (C)	The number of completed performance management forms completed by December 31 divided by the total number of eligible employees.	Annually	Talent Management and Corporate Administration		↑	99%	95%	N/A	Update to be provided after the reporting year has passed.

**Legend**

**Status Definitions:**

- Performance on target
- Performance slightly below target
- Performance significantly below target
- No update this quarter or indicator is milestone-based

**Notes:**

- 1) Indicators required under FARPACTA legislation are identified with an (F) label
- 2) Indicators reported to Council are identified with a (C) label
- 3) For text in *italics*, we have provided the most recent information

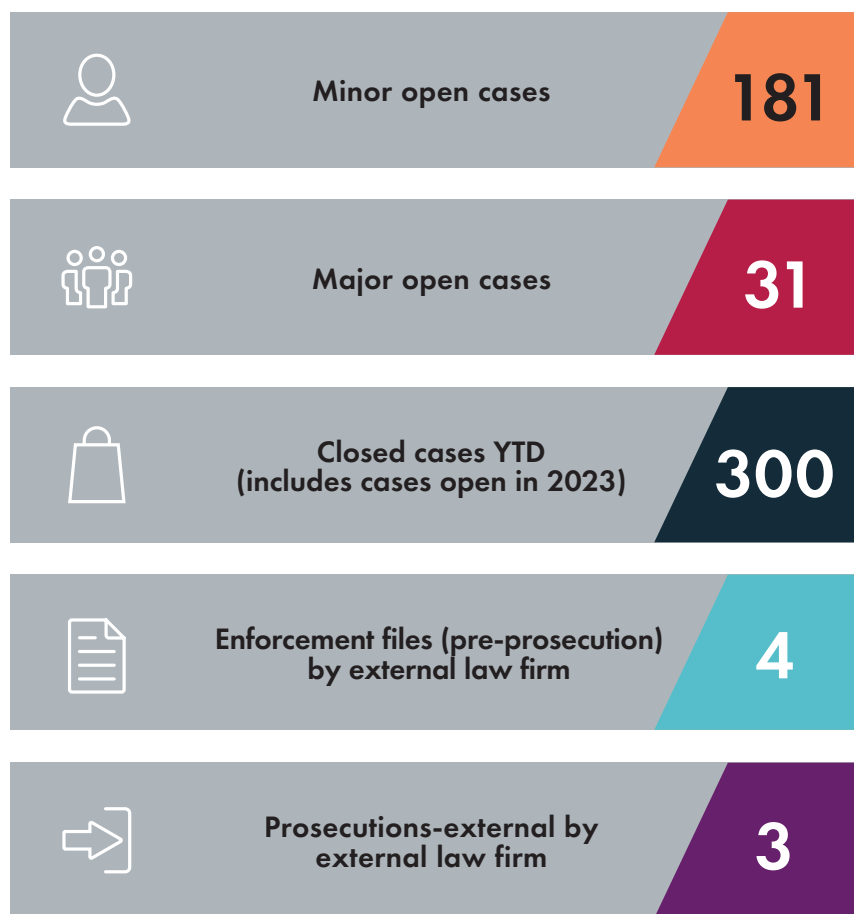
Figure 3: Governance Scorecard



**Unlicensed Practice**

Throughout 2024, Unlicensed Practice has made significant progress to reduce the time it takes to process, investigate and conclude a file involving allegations of improper use of a restricted title or of unlicensed individuals illegally practicing engineering. As of July 2024, the median time a file is open is 63 days, reduced by over 54 per cent from 139 days in 2023. The Unlicensed Practice team is streamlining processes and re-balancing workloads. Open files are tracked and assessed regularly. PEO staff continue to explore appropriate technology supports to enable effective workflows. The ongoing LEAN review of the Regulatory Operations Division's processes is expected to assist with this, and to provide additional recommendations for improvement.

The Unlicensed Practice team recently collaborated with the Ministry of Environment, Conservation and Parks on a cross-jurisdictional file involving an unlicensed individual to ensure that violations of multiple provincial legislation are properly addressed. The team is also pursuing prosecution of a long-cancelled former licence holder choosing to offer engineering services with neither a PEO licence nor a certificate of authorization.





### **Complaints and Investigations**

The Complaints and Investigations department continues to see an increase in the number, and the complexity, of complaints filed with PEO against licence holders. All filed complaints that are within PEO's jurisdiction are investigated and eventually referred to the Complaints Committee to decide whether the matter should be put before the Discipline Committee for adjudication or whether some other regulatory response, such as a letter of advice and/or a voluntary undertaking to comply with the applicable rules or required practices in future, is more appropriate.

Various steps, including the need to assemble and review evidence, communicate in writing with the complainant, witnesses and the licence or certificate holder, and ensure compliance with any undertaking, will add to the overall processing time of a complaint file. An ongoing LEAN review will assist staff and the Complaints Committee in identifying opportunities for efficiencies, the elimination of redundancies, and more timely dispositions of complaints files. These will likely involve technological solutions as well as the reorganization of current business processes.

Additionally, staff are exploring changing the way Investigation and Complaints metrics are collected and reported with the goal of providing Council and other stakeholders a more accurate and meaningful overview of the department's efficiency and effectiveness. In particular, a focus will be put on highlighting the number of days staff spend on investigating and processing a file, in addition to the time spent waiting for an external task or process to be completed and the overall time it takes for a complaint file to be closed.

	2022	2023	2024 (August 16)
<b>Complaints Committee (COC) Caseload</b>			
Filed Complaints <sup>1</sup> not disposed of by COC at previous year-end	105	120	160
Complaints Filed (PEA s. 24. 1(a)) during the Year	96	90	73
Total Caseload in the Year	201	210	233
Total Filed Complaints Disposed of by COC in the Year (for details see COC's <i>Disposition of Complaints</i> below)	81	50	9
Total Filed Complaints Pending for COC Disposition (for details see <i>Status of Active Filed Complaints</i> below)	120	160	224
<b>COC's Disposition of Complaints</b>			
Direct that the matter be referred, in whole or in part, to the Discipline Committee. (PEA s. 24. 2(a))	13	11	0
Direct that the matter not be referred. (PEA s. 24. 2(b))	35	30	8
Take such action as COC considers appropriate in the circumstances and that is not inconsistent with this Act or the regulations or by-laws. (PEA s. 24. 2(c))	33	9	1
<b>COC's Timeliness Regarding the Disposition of the Complaint<sup>2</sup></b>			
Complaint disposed of within 90 days of filing	0	0	0
Complaint disposed of 91–180 days of filing	3	1	0
Complaint disposed of after more than 180 days of filing	78	49	9
<b>COC Processing Time – Days from Complaint Filed to COC Disposition (12 mo. rolling avg.)</b>			
Average # Days	554	509	614
Minimum # Days	154	176	252
Median # Days	414	427	593
Maximum # Days	1766	1761	1761

Figure 4: Complaints and Investigations Statistics

<sup>1</sup> Signed Complaint Form filed with the registrar.

<sup>2</sup> Days from Complaint Filed to date COC Decision is signed by COC chair.



**STATUS OF ACTIVE COMPLAINTS**

Active Filed Complaints–Total		<b>224</b>
<b>Complaints filed more than 180 days ago</b>	<b>157</b>	<b>157</b>
Pending Approval and Reason regarding COC Decision	77	
Complaints under active consideration by COC	23	
Completed Investigation ready for COC consideration	9	
Regulatory Compliance Investigation	48	
<b>Complaints filed 91–180 days ago</b>	<b>29</b>	
Pending Approval and Reason regarding COC Decision	0	
Complaints under active consideration by COC	0	
Completed Investigation ready for COC consideration	0	
Regulatory Compliance Investigation	29	
<b>Complaints filed within the past 90 days</b>	<b>38</b>	
Pending Approval and Reason regarding COC Decision	0	
Complaints under active consideration by COC	0	
Completed Investigation ready for COC consideration	0	
Regulatory Compliance Investigation	38	

Figure 5: Status of Active Filed Complaints

**Review by Complaints Review Councillor (PEA s. 26. (s))**

Under section 26 of the Act, the Complaints Review Councillor may review the treatment of a complaint against a licence or certificate holder if it has not been disposed of within 90 days after it has been filed. This may occur at the behest of the complainant or on the CRC’s own initiative. The CRC review of how the complaint was handled can also be triggered by the complainant after the Complaint Committee has disposed of it. Under the Act, the CRC is not permitted to inquire into the merits of the complaint, only the process used to address it.

**Glossary of Terms**

**Complaint Filed**–Signed Complaint Form filed with the registrar.  
**Investigation Complete**–Investigation Summary document prepared and complaint file ready for COC consideration

COMPLAINTS AND INVESTIGATION STATISTICS AS OF AUGUST 16, 2024

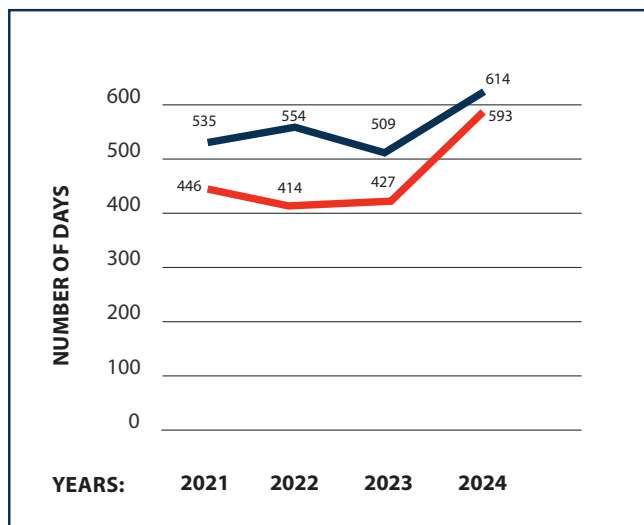


Figure 6: Complaint File Processing Times (12 month rolling average)

— AVERAGE # DAYS  
 — MEDIAN # DAYS

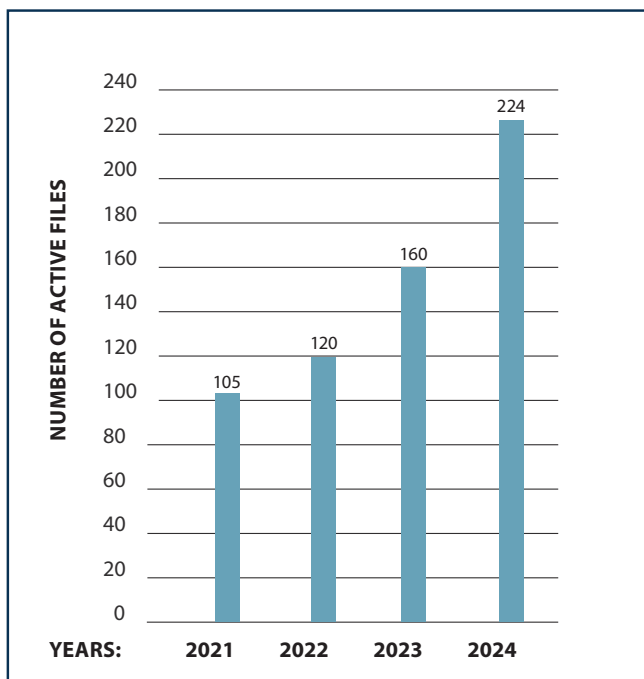
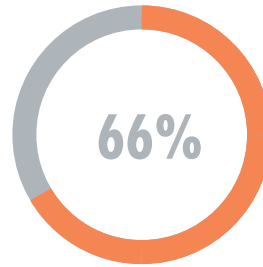


Figure 7: Number of Active Complaints Files, Year End 2021–2023 and YTD 2024

Complaints volumes have more than doubled since 2021.

**REGULATORY COMPLIANCE LEGAL DEPARTMENT**

There have been 5 Discipline Committee hearings in 2024, all of which were resolved on consent, with the respondent(s) pleading guilty to professional misconduct. Notable penalties included relatively serious suspensions and practice restrictions, all justified by the circumstances.



of legacy process Notices of Proposal were closed as of Q3 2024.

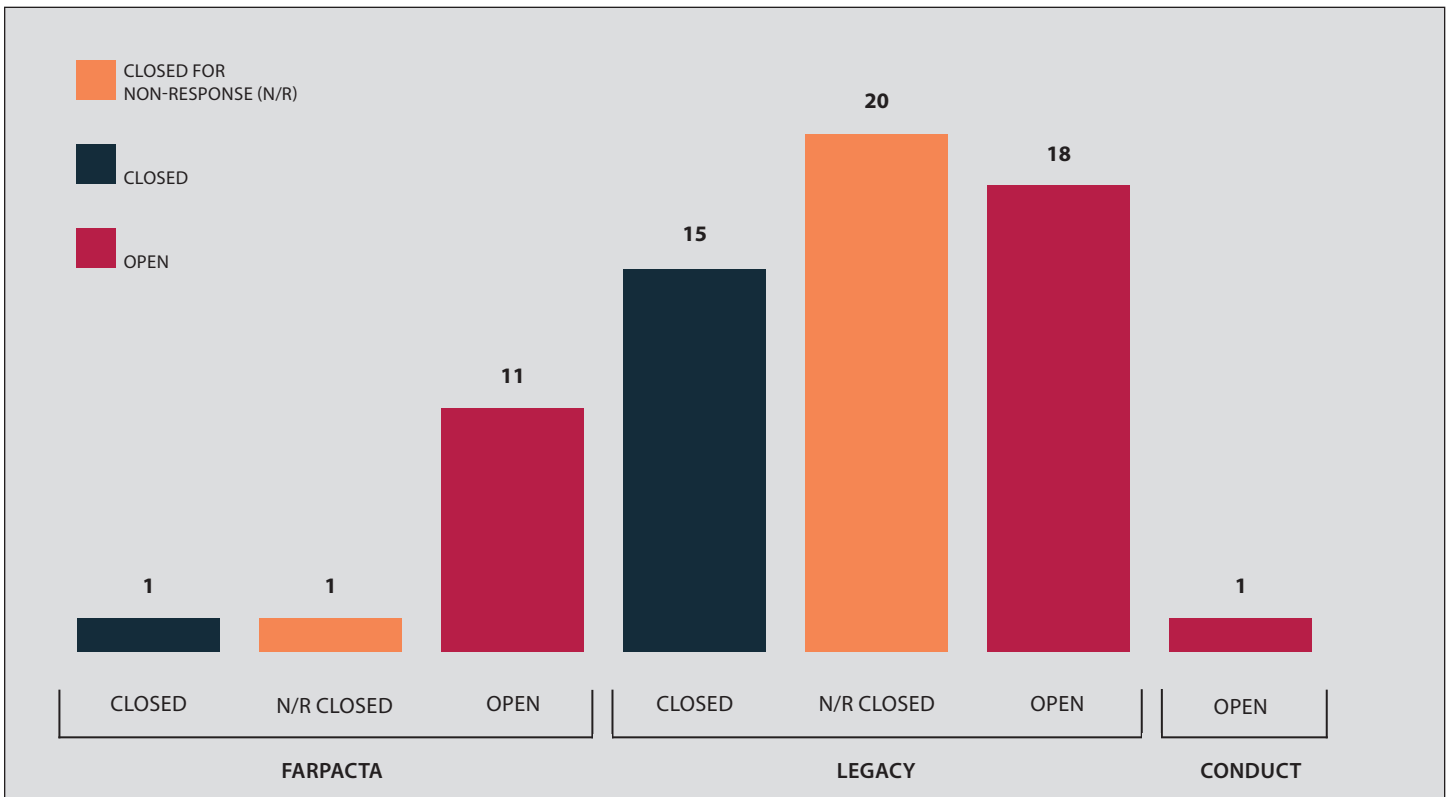


Figure 8: Number of NOPs which are open, closed and closed for non-response between Q1 2023 and Q3 2024 in the legacy and FARPACTA processes.



## FINANCE

For the seven months ending July 31, 2024, revenues earned amounted to \$22.2 million, while expenses incurred totaled \$19.3 million. This resulted in an excess of revenue over expenses of approximately \$2.9 million, as shown in Figure 9. The \$1.5 million favourable variance in revenue is largely attributable to a higher-than-expected investment income and 40 Sheppard revenue.

On the expense side, total expenses for the seven months ending July 31, 2024, amounted to \$19.3 million. This compared to a budgeted spend of \$21.3 million, resulting in a favourable variance of

\$2 million. This favourable variance is mainly due to lower expenses incurred by PEO chapters, and lower than expected spend on legal expenses, staff salaries and benefits, contract staff, purchased services and volunteer business expenses.

	2024 Actual	2024 Budget	Variance Actual vs Budget
<b>TOTAL REVENUES</b>	<b>\$22,172,299</b>	<b>\$20,691,485</b>	<b>\$1,480,814</b>
Operations expenses	\$17,720,656	\$19,519,060	\$1,798,404
Sp. projects and strategic plan exp	\$1,587,971	\$1,796,000	\$208,029
<b>TOTAL EXPENSES</b>	<b>\$19,308,626</b>	<b>\$21,315,060</b>	<b>\$2,006,434</b>
<b>EXCESS OF REV OVER EXP</b>	<b>\$2,863,672</b>	<b>(\$623,576)</b>	<b>\$3,487,248</b>

Figure 9: Revenues and expenses as of July 31, 2024

	2024 Actual	2023 Actual	Variance Actual Vs Actual
Cash	\$10,467,121	\$9,806,274	\$660,847
Other current assets	\$1,008,310	\$901,484	\$106,826
Marketable securities	\$30,579,954	\$28,068,215	\$2,511,739
Capital assets	\$26,492,752	\$27,663,718	(\$1,170,966)
<b>TOTAL ASSETS</b>	<b>\$68,548,137</b>	<b>\$66,439,691</b>	<b>\$2,108,446</b>
Current liabilities	\$13,917,609	\$14,532,705	(\$615,096)
Employee future benefits	\$12,061,100	\$13,260,100	(\$1,199,000)
Net assets	\$42,569,428	\$38,646,886	\$3,922,542
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$68,548,137</b>	<b>\$66,439,691</b>	<b>\$2,108,446</b>

Figure 10: Assets and liabilities as of July 31, 2024

**Remissions and Resignations**

As of July 31, 2024, the data in Figure 7 shows that the total number of P.Engs in fee remissions was approximately 13,216, in comparison to 13,048 as of the same period in 2023. The number of resignations as of July 31, 2024, was 801 as compared to 1547 resignations as of

July 31, 2023. Additionally, the number of P.Engs as of July 31, 2024, remained largely unchanged at approximately 88,237 in comparison to 87,361 reported on July 31, 2023.

	YTD JULY 2024	YTD JULY 2023
Members seeking remission	1934	1569
Total members in fees remission	13,216	13,048
Members resigned	801	1547
Total P.Engs	88,237	87,361

Figure 11: Estimated Remissions and Resignations as of July 31, 2024

**CUSTOMER SERVICE**

From January 1 to July 31, 2024, PEO's Customer Service team handled 17,596 tickets, including 15,398 emails, 2098 calls and 100 walk-ins, and were able to resolve 71.75 per cent of all inquiries. Most inquiries were relating to PEAK and technical support.

As part of efforts to expand the customer service model, PEO's level one service team's coverage will be expanding in 2024 to include some enforcement-related queries and FARPACTA inquiries.

Feedback on post-query feedback surveys continues to be positive, with an overall satisfaction rating of 7.4 out of 10.

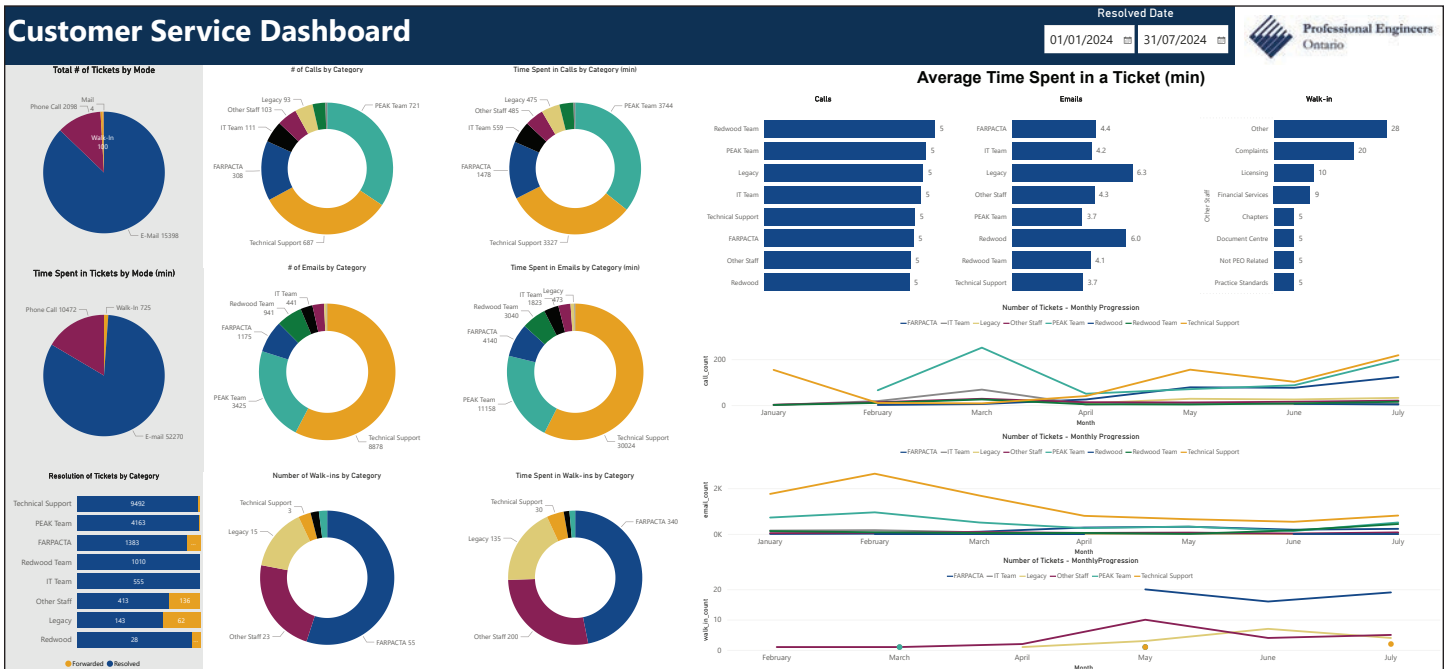


Figure 12: Customer Service Dashboard

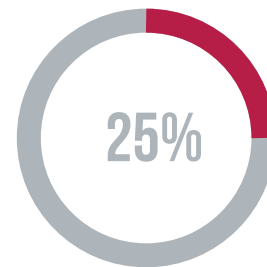
### EVENT ENGAGEMENT MODEL

PEO’s Event Engagement Model continues to be a success, with 11 visits having been completed already against a target of 12 in the program’s inaugural year. Under this program, senior PEO staff attend Chapter events, including a licence ceremony as shown below. Licence ceremonies hosted by chapters provide individuals

with the option to receive their licence certificate by a licensed engineer and member of the PEO chapter network in an environment surrounded by family, friends and other licensed engineers.



Brantford-Brant MPP Will Bouma, PhD, for Brantford-Brant, poses with P.Eng. licence certificate recipients at PEO’s Brantford Chapter license certificate ceremony in May 2024.



#### Did you know?

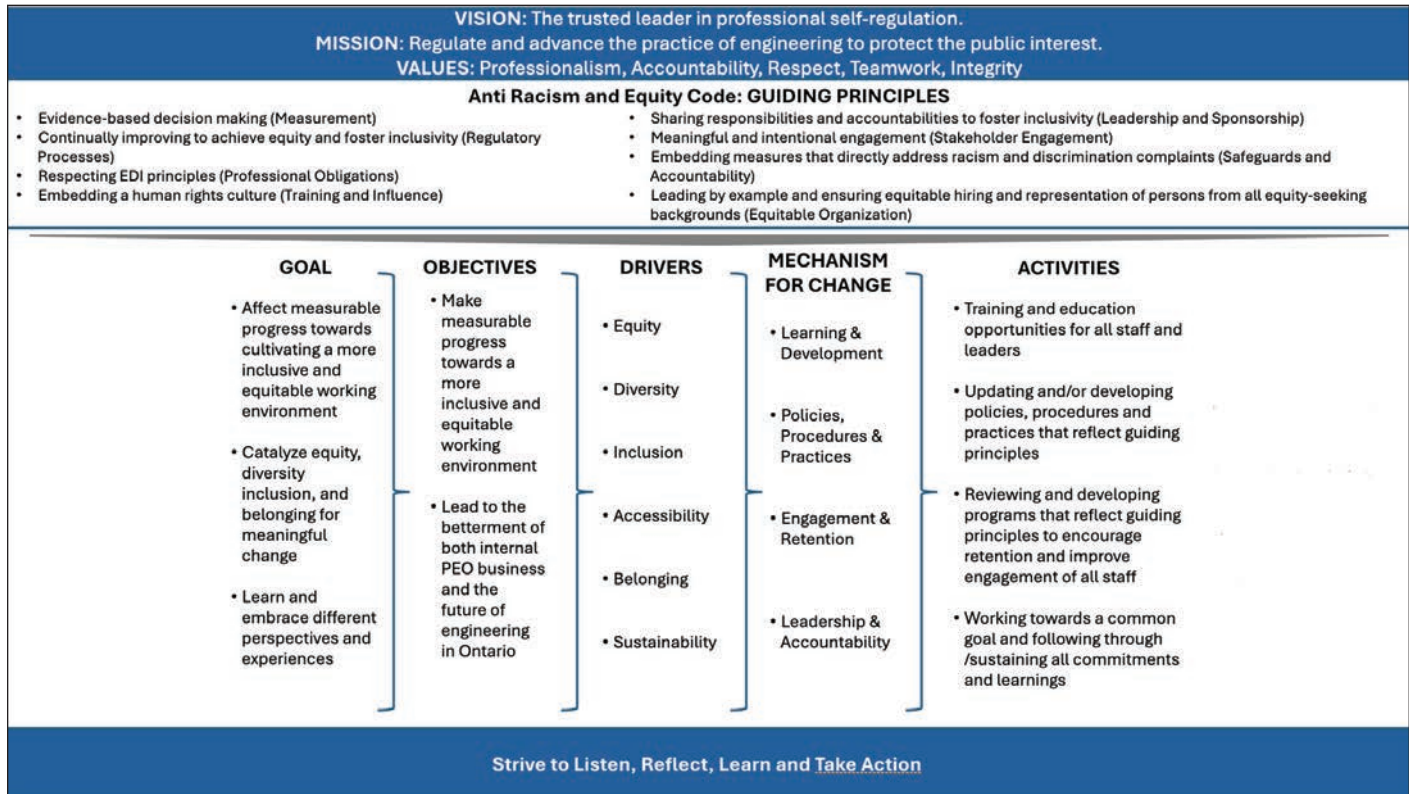
Approximately 25 per cent of engineers choose to receive their licence certificate at a PEO licence ceremony.

REGION	2024 ACTUAL
East Central	3
Eastern	2
Northern	1
West Central	3
Western	2
<b>ALL CHAPTERS</b>	<b>11</b>

Figure 13: EEM Program Target: Minimum 2 visits per region annually and 12 unique chapter visits



2024–2025 EDI ACTION PLAN



## 2024–2025 EDI ACTION PLAN

ARE Code Categories	Activities	Completion Date
<b>Raising Awareness (Principle 4)</b>	<ul style="list-style-type: none"> <li>• Create a storytelling series in issues of <i>Engineering Dimensions</i> to amplify the voices and experiences of equity-seeking practitioners and communities.</li> <li>• Create an EDI subsection on PEO's website.</li> <li>• Create social media posts that bring awareness to EDI-related issues and barriers and explain how we are bridging gaps within the profession.</li> <li>• Deliver consistent messages from the CEO/registrar about EDI issues and our commitment to EDI work (including in the CEO/Registrar's Report to Council; <i>Engineering Dimensions</i>, etc.).</li> <li>• Create EDI Corner in PEO's monthly staff newsletter, covering various EDI concepts and education pieces.</li> <li>• Create an EDI calendar that includes various initiatives and events being planned and already underway, including appropriate staff to support each item.</li> </ul>	<p>Q4/2024 - Ongoing</p> <p>Q1/2025</p> <p>Ongoing</p> <p>Ongoing</p> <p>Q2/2024</p> <p>Q1/2025 &amp; ongoing updates</p>
<b>Education and Training (Principle 4)</b>	<ul style="list-style-type: none"> <li>• Provide training on EDI topics to Council and tribunals.</li> <li>• Deliver the Council-approved Engineers Canada EDI webinar to PEO staff and volunteers.</li> <li>• Create governance orientation modules for new Council members to help them understand how they can embed EDI into their work.</li> </ul>	<p>Q1-Q2/2025</p> <p>Q1/2025</p> <p>Q1/2025</p>
<b>Regulatory Policy and Regulatory Programs (Principle 2)</b>	<ul style="list-style-type: none"> <li>• Ensure that every policy proposal impacting the interests of licence holders is accompanied by an Equity Impact Assessment.</li> <li>• Undertake a comprehensive review of all existing PEO program policies prioritizing licensing, complaints and discipline processes to identify gaps and propose strategies that will enable PEO to achieve equity and foster inclusivity in its core regulatory functions.</li> <li>• Work with the call centre to create a mechanism to provide over-phone interpreting (e.g., partnership with MCIS interpretation services).</li> <li>• Create and translate documents into various languages for applicants and licence holders. Documents will include: <ul style="list-style-type: none"> <li>▪ PEO's role and public protection mandate</li> <li>▪ How to apply to become licenced</li> <li>▪ How to file a complaint and the complaints process</li> </ul> </li> <li>• Produce a video for CBA assessment to increase accessibility and enhance visual understanding.</li> <li>• Ensure all newly created and revised documents meet accessibility regulations and use gender-neutral language.</li> </ul>	<p>Ongoing</p> <p>Q2/2025</p> <p>Q1/2025</p> <p>Q4/2025-Q2/2026</p> <p>Q4/2024</p> <p>Ongoing</p>
<b>Professional Obligations (Principle 3)</b>	<ul style="list-style-type: none"> <li>• Review PEO's Guideline on Human Rights in Professional Practice.</li> <li>• Undertake a comprehensive review of all existing PEO regulations, policies, standards, and guidelines to determine if and how they should promote EDI principles so that principles are reflected in the conduct and services provided by licence holders.</li> </ul>	<p>Q4/2024</p> <p>Q2/2025</p>
<b>Engagement and Partnership (Principle 6)</b>	<ul style="list-style-type: none"> <li>• Continue to collaborate with other Canadian engineering regulators on the 30 by 30 initiative and other Engineers Canada EDI strategic initiatives to raise "the percentage of newly licensed engineers who are women to 30 per cent by the year 2030".</li> <li>• Ensure that the Strategic Stakeholders Advisory Group represents a variety of identities, backgrounds, perspectives and abilities to support the objectives of the Anti-Racism and Equity (ARE) Code.</li> <li>• Develop meaningful community partnerships with agencies to inform our EDI work and to raise awareness of existing gaps within equity-seeking communities.</li> </ul>	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>

<p><b>Accountability</b> <i>(Principle 7)</i></p>	<ul style="list-style-type: none"> <li>• Create an EDI Action Plan to implement the commitments made under the ARE Code adopted by Council in April 2022.</li> <li>• Publicly report on the progress of PEO’s EDI Action Plan annually.</li> <li>• Develop EDI-related metrics to incorporate into PEO’s Governance Scorecard.</li> <li>• Implement recommendations prepared by Indigenous &amp; Community Engagement (ICE) for addressing the Truth and Reconciliation Commission’s (TRC) Calls to Action and increasing Indigenous representation in Ontario engineering.</li> </ul>	<p>Q2/2024</p> <p>Q2/2025</p> <p>Q4/2024</p> <p>TBD</p>
<p><b>Equitable organization</b> <i>(Principle 8)</i></p>	<p>Integrate the below internal EDI pillars to ensure equitable hiring and representation of persons from all equity-seeking backgrounds and to foster retention, inclusion, advancement, belonging and equity regarding equity-seeking persons and everyone at all levels in the organization.</p> <ul style="list-style-type: none"> <li>• Learning &amp; Development: Deploy training and education opportunities for all staff and leaders.</li> <li>• Policies &amp; Procedures: Update and/or develop policies, procedures and practices that reflect guiding principles.</li> <li>• Engagement &amp; Retention: Review and develop programs that reflect guiding principles to encourage retention and improve staff engagement.</li> <li>• Leadership &amp; Accountability: Work towards a common goal, following through and sustaining all commitments and learnings.</li> </ul>	<p>Q3/2024</p>
<p><b>Establish internal and external reporting and data collection.</b> <i>(Principle 1/7)</i></p>	<ul style="list-style-type: none"> <li>• Gather and publicly report disaggregated race-based data, other identity-based data, and EDI metrics, based on voluntarily expressed consent to better understand the diversity of the profession and the challenges experienced.</li> </ul>	<p>Q1 2026 &amp; ongoing</p>
<p><b>Stakeholder engagement</b> <i>(Principle 6)</i></p>	<ul style="list-style-type: none"> <li>• Partner with external organizations that serve underrepresented populations to gain a better understanding of the work that needs to be done to support the ARE Code.</li> </ul>	<p>Q3/2024</p>
<p><b>Leadership and Decision-Making</b> <i>(Principle 5)</i></p>	<ul style="list-style-type: none"> <li>• Join the federal government’s 50-30 challenge and identify ways to improve access to positions of influence and leadership on Council and in senior management to support diversity at PEO.</li> </ul>	<p>Q3/2025</p>

## COMMUNICATIONS AUDIT RECOMMENDATIONS AND EXECUTION TACTICS–ACTION PLAN

## Recommendation 1: Clearly define PEO and its role

RECOMMENDATION	TACTICS	TIMELINE
1. Create and adopt language that clearly describes PEO’s legislative mandate and activities.	<ul style="list-style-type: none"> <li>-Include messaging in PEO external communications stating that PEO advocates for compliance and excellence in the profession but does not represent the interests of or serve as the voice of the engineering profession.</li> <li>-Strive to amend language in the <i>Professional Engineers Act, R.S.O. 1990</i> to replace “association” with relevant regulatory terminology.</li> <li>-Clearly describe PEO and its role on the organization’s website and in all external communications.</li> </ul>	<p>Ongoing</p> <p>Under consideration</p> <p>Ongoing</p>
2. Adopt consistent language describing PEO and its role.	<ul style="list-style-type: none"> <li>-Key message document development</li> <li>-Presentation coaching &amp; media training for PEO’s official spokespeople</li> </ul>	<p>2025</p> <p>2025</p>
3. Engage chapters in promoting PEO, its mandate, and role.	<ul style="list-style-type: none"> <li>-Develop communication plan with a goal to strengthen strategic alignment between PEO &amp; chapters</li> </ul>	<p>2025</p>



**Recommendation 2: Implement standard communication structures, protocols, and practices**

RECOMMENDATION	TACTICS	TIMELINE
<p>1. Implement strategies to communicate to the public.</p> <ul style="list-style-type: none"> <li>• Determine PEO’s “public”.</li> <li>• Identify your public’s preferred communication choices.</li> <li>• Communicate the role of PEO.</li> </ul>	<ul style="list-style-type: none"> <li>-Conduct public perception/ confidence study</li> <li>-Conduct a public protection marketing campaign to promote PEO, its mandate, and role.</li> </ul>	<p>2025</p> <p>Under consideration</p>
<p>2. Create and update necessary communications policies governing public relations, public affairs.</p>	<ul style="list-style-type: none"> <li>-Communications &amp; media policy</li> <li>-Social media policy</li> <li>-Accessible communications policy</li> <li>-Canada Anti-Spam Law (CASL) policy</li> <li>-AI policy</li> </ul>	<p>2025</p> <p>2025</p> <p>2025</p> <p>2025</p> <p>Under consideration</p>
<p>3. Establish crisis communications protocols.</p>	<ul style="list-style-type: none"> <li>-Develop and test crisis communications plan</li> <li>-Media training (every two years) for PEO spokespersons</li> </ul>	<p>2025</p> <p>2025</p>
<p>4. Refresh style guides.</p>	<ul style="list-style-type: none"> <li>-Refresh brand guidelines</li> <li>-Produce style guidelines (to reflect accessible, inclusive and plain language principles)</li> </ul>	<p>2024</p> <p>2025</p>
<p>5. Create a formal working relationship with chapters.</p>	<ul style="list-style-type: none"> <li>-Establish communication parameters</li> <li>-Centralize websites on one site and manage in-house</li> <li>-Approve major external communications from chapters</li> <li>-Ban use of social media beyond sharing HQ’s messages</li> </ul>	<p>2024</p> <p>Under consideration</p> <p>Under consideration</p>
<p>6. Include media monitoring in daily operations.</p>	<ul style="list-style-type: none"> <li>-Subscribe to media monitoring platform for daily press and social media coverage reports</li> </ul>	<p>Complete</p>
<p>7. Align communications strategy with PEO’s next three-year strategic plan.</p>		<p>2026</p>

**Recommendation 3: Commit to greater openness and transparency**

RECOMMENDATION	TACTICS	TIMELINE
<p>1. Strategically communicate change and transformation.</p> <ul style="list-style-type: none"> <li>• Regulatory changes - highlight the purpose, explaining how they contribute to PEO's public protection mandate, provide examples of how the changes will enhance public safety, improve professional standards, or streamline processes.</li> <li>• Emphasize how the changes align with PEO's mandate and align with strategic goals.</li> <li>• Engage stakeholders early and often: Conduct informational sessions, webinars, and Q&amp;A forums to address concerns and provide detailed explanations of the changes.</li> <li>• Ensure that the information is accessible and easy to understand, avoiding technical jargon where possible.</li> </ul>	<p>-Establish a robust communication planning framework to strategically outline and implement key changes, ensuring clear, consistent, and transparent communication to prevent confusion, miscommunication, and mistrust among licence holders and other stakeholders.</p>	<p>2024–2025</p>
<p>2. Establish service standards.</p>	<p>-Create realistic, but short response to reply to the public, licence holders, and all stakeholders, and encourage an organization-wide commitment to communication turnaround time.</p>	<p>2024–2025</p>
<p>3. Leverage associations to share PEO's messaging to licence holders.</p>		<p>Ongoing</p>

**Recommendation 4: Support PEO’s commitment to modernize**

RECOMMENDATION	TACTICS	TIMELINE
1. Communicate with an ongoing commitment to Equity, Diversity, and Inclusion.	-Adopt plain language in all internal and external communications.	Ongoing (formally reflected in style guidelines and accessible communications policy by 2025)
2. Recommit to producing a print version of <i>Engineering Dimensions</i> for licence holders.	-Maintain a digital publication as the primary format and provide licence holders with an option to opt-in to receive a print version.	Q4 2024
3. Develop a plan to communicate externally in both of Canada’s official languages.		Under consideration
4. Adopt principles of kindness in regulation to improve tone in communication to licence holders.	-To be done in conjunction with the development of style guidelines (to reflect accessible, inclusive and plain language principles)	Ongoing (formally reflected in style guidelines by 2025)
5. Commit to two-to-three-year plan to rebuild PEO’s website.		2025