

Financial service team a key point of contact for members

By MICHAEL MASTROMATTEO

PEO's financial services and business planning section, a part of the Administrative Services department, is often the first line of contact between the regulator and its 70,000 licensed members.

Its stated goal is to ensure PEO's financial soundness and the integrity of its regulatory renewals through effective financial stewardship, planning, processing and invoicing. The section's main role is to process payments for annual licence fees, Certificates of Authorization (Cs of A) and examination sittings.

The team is also responsible for acknowledging payments received, sending out membership cards on licence renewal, issuing reminder letters to members whose fee payments are due, and processing "fee remission" applications for members who are excused from pay-

Customer service is the top priority for the members of PEO's financial services group. Its goal is to put a human face on the routine, and often sensitive, tasks of fee collection, invoicing and balancing the books.

ing all or a portion of the annual licence fee because they qualify under PEO's Reduced Fee Policy (visit the Fees and Records section of the PEO website to view the fee policies).

The six members of the team—Supervisor Tom Foteu, and account services administrators Oscar Polangco, Jenny Melendez, Jenny Zang, Annaresa Alocada and Rosemary LoScerbo—have a com-

bined total of nearly 50 years' experience in PEO's bill paying and invoicing services. Admittedly, the bulk of that total belongs to PEO veterans Oscar Polangco (27 years) and Jenny Melendez (15 years), but other qualities brought to bear by the remaining team members are decided assets in the customer service imperative.

Tom Foteu, ironically, is one of the newer members of the team, but he



PEO's financial services and business planning section includes (back row, left to right) Annaresa Alocada, Jenny Melendez, Jenny Zang, and Rosemary LoScerbo. Up front are Oscar Polangco (left) and Supervisor Tom Foteu. The financial services team is often the first point of contact for PEO members.

already keenly appreciates the human side of the team's work, and its importance in putting a human face on PEO's financial operations.

"Many PEO members have talked to our staff over the years and have not met them in a personal way," Foteu said. "In my opinion, the membership would appreciate the person-to-person interaction, and sometimes that human element is lacking when a reminder or invoice is sent out."

Statistics compiled for 2006 give some indication of the extensive sweep of financial services' interaction with the province's licence holders and engineering interns. In 2006, the team issued 73,000 membership cards or receipts, along with some 28,000 renewal reminder letters. It also processed and deposited more than 50,000 electronic payments and 40,000 cheque payments, handled fees for new licence, examination and C of A applicants, and looked after 1500 requests for licence reinstatement.

The team also oversees expense claims and reimbursements to PEO staff, volunteers and suppliers.

But not all the services offered by the team involve financial transactions. It also responded to more than 6000 telephone inquiries about licence renewal options and some 1200 inquiries about reduced fee options. This telephone work requires tact, diplomacy and, occasionally, some patience, especially when the subject involves fee payment. PEO takes pains to assure members that their fees are being put to best use in the regulation of the profession, and the financial services team tries hard to avoid any misunderstandings about invoices, late payments and the like.

Supervisor Foteu believes, however, that the current team possesses the right blend of patience, perseverance and commitment to live up to "high-end services" to membership.

"Our staff members have all those years of experience dealing with customers and the knowledge to understand what the membership needs and expects from us," he said. "We encourage our staff to treat our members with courtesy and the utmost respect."

Foteu says PEO is continually looking to make its financial services easier to use for membership. This requires that staff adjust to changing processes and sys-

tems, while remaining adept at the more traditional operations.

"I believe PEO has the kind of work environment in place that allows our staff to excel and meet the many challenges," Foteu says. "Working together with our staff, we have brainstormed and implemented many new ideas and programs." Our staff has gained valued information from the membership and has learned much from their suggestions as well."

Foteu said the financial services and business planning section also benefits from the regulator's culture of continuous improvement, which challenges all team members to learn and grow in their jobs.

Veteran Oscar Polangco admits that responding to members' questions about renewal notices, late payments, and the ominous sounding "termination notice" in the event of a non-payment of fees, requires tact.

"We have to be ready for just about anything," Polangco says, "including an upset caller who claims not to have received

any renewal notices. But, it's all part of the day's work."

Administrator Jenny Melendez, the other veteran on the team, also works at smoothing out members' ruffled feathers. "We allow them to speak their minds and investigate the source of any problem," she says. "We need to be extra patient, because not only are we representing PEO, but as financial services representatives, it is our duty to be polite to our members."

Polangco and Melendez, along with administrators Jenny Zang, Annaresa Alacada and Rosemary LoScerbo, are usually the first telephone and email contacts for members. In terms of making positive impressions with callers—or defusing potential situations with timely information and advice—this crew's efforts are the most important to the customer service ideal.

For questions about fee payments, membership renewals, remissions or reinstatements, contact Jenny Melendez at 416-840-1091 or email jmelendez@peo.on.ca. 

