HOSPITALITY AND CORPORATE EVENTS

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VALUE STATEMENT

In keeping with the core value of ***Excellence,*** the organization fosters an environment characterized by hospitality, trust and a spirit of community, ensuring transparency, fairness and responsible use of its resources.

OBJECTIVE

To set guidelines that are modest, appropriate and reasonable for the expenses occurred for facility-related hospitality and corporate events.

DEFINITIONS

'Authorization': The approval of an expense reimbursement by the appropriate person with adequate signing authority as defined in the Authorized Spending Limits and Signing Authority policies.

'Business Expenses': Reasonable expenses incurred by staff in the course of performing their duties.

'Consultants': Persons providing services to the facility on an independent contractor basis, and who are not employees of the facility. For greater clarity, consultants are not to be considered "staff" as that term is defined below.

'Facility': Facility-related regular place of business; may be St. Joseph's Health Centre (SJHC), St. Joseph's Continuing Care Centre (SJCCC), St. Joseph's Villa (SJV), or Villa St. Gabriel's Villa (VSGV).

'Hospitality': The provision of food, beverage, accommodation, transportation and other amenities at the facility expense to persons who are not employed by the facility.

'Lead': This refers to the following individuals: Vice President, Chief of Nursing and Allied Health, Chief Operating Officer, Administrator.

'Office': The facility-related regular place of work. For example, the address on the staff person's business card or where the staff person has an office, desk, computer, telephone etc.

'Receipt': An original document, or carbon or certified copy, with the details of the expenditure, the amount, the date and indicating proof of payment.

'Staff': For the purposes of these Guidelines, "staff" includes all facility employees, credentialed staff, volunteers, Board Directors, outsourced service staff and other individuals engaged in facility business and who intend to receive travel and expense reimbursement under this policy.

POLICY

Provision of Hospitality

The facility will extend hospitality in an economical, consistent and appropriate way when it conducts business or it is considered desirable as a matter of courtesy. Functions that are an exception to this must have prior approval of the President and CEO and/or delegate.

Where hospitality events are extended by the facility, and where the guests include vendors (current or prospective), Vice President (VP), Administrators (A), Chief of Nursing and Allied Health (CoNAH), Chief Operating Officer (COO), Directors and/or delegates are responsible for obtaining prior approval to ensure that the event does not give, or is not perceived to give, preferential treatment to any vendor.

Hospitality may be extended on behalf of the facility when:

- Engaging representatives of other facilities, the government, the broader public sector, industry, public interest groups or union representatives in discussion on facility matters;
- Sponsoring formal conferences for representatives of health service provider organizations, or for government, business or labour groups;
- Providing persons from national or international organizations and charitable organizations with an understanding and appreciation of the operations of the organization;
- Honouring distinguished persons from the health care sector in recognition of exceptional public service; and
- Conducting prestigious ceremonies that are attended by government, and/or distinguished persons from the private or public sector.

Acceptance of Hospitality

Acceptance of hospitality from vendors (current or prospective) may constitute a conflict of interest, and may therefore be prohibited. It is the responsibility of the Vice President/Administrator/Chief of Nursing and Allied Health/Chief Operating Officer (VP/A/CoNAH/COO), Director and/or delegate of the department to ensure that staff is aware of their conflict of interest obligations and that proper approval is sought prior to engaging in the event.

The facility will ensure that it avoids the appearance of impropriety or favouritism when accepting hospitality from vendors (current or prospective). Attendance by any staff member on behalf of the facility at various third-party events, including but not limited to sporting events, entertainment, dinners or speaking engagements, must not violate the facility's conflict of interest obligations, nor should such attendance appear to violate those obligations.

Consultants may receive hospitality or take part in hospitality events dependent upon the details provided within the contract for services between the facility and the consultant.

Alcohol

Costs incurred for alcoholic beverages generally, will not be reimbursed. However, under certain circumstances such as special events or meals (business and/or travel), alcohol may be approved by the President & CEO or the Board Chair.

If such approval is issued, the approving individual will place explicit limitations on the amount which will be

reimbursed for alcohol-related expenses.

The invoice detailing the alcoholic purchase will be required for reimbursement.

Staff Events and Parties

- The organization, and its working committees shall decide on the number of, timing, budget, and practicality of special events.

- All staff event or party expenses must be reasonable.

- Events held on any facility premises must be approved by the appropriate department lead.

- Events held off the facility premises must be approved by the President & CEO or the appropriate department lead.

- The decision to provide alcohol at any staff event must be approved by the President & CEO or by the department lead, and appropriate measures must be taken to ensure a reasonable limit is placed on the quantity and cost of alcohol to be provided in advance of the event.

Recognition Events

- Recognition events, such as service milestones, volunteer or Board member recognition or retirement events, will be designed to recognize, reinforce or promote positive behaviours and performance that support the Mission and Values of the individual facility and the Catholic Health Sponsors of Ontario (CHSO).

- Recognition events may be formal (ceremony) or informal (presentation).

- Other informal events, such as non-work-related social gatherings of staff, will not be contemplated within the scope of this policy.

- If alcoholic beverages are served at any recognition event, it will be approved by the President & CEO or Lead of the department involved, and appropriate measures will be taken to ensure a reasonable limit is placed on the quantity and cost of alcohol to be provided in advance of the event.

- Any form of staff recognition outlined in facility policy has human resources implications and must be designed in conjunction with the Human Resources Department.

Gifts of Appreciation

- Gifts of appreciation may be extended to a member of staff and will be approved by the individual's supervisor in accordance with pre-established criteria or benchmarks.

- There may be a range of gifts of appreciation, depending on the type of appreciation.

- The facility will:
    - Set a scale (small to large) of the different types of appreciation;
    - Identify who (i.e. supervisor, manager, VP/A/COO/CoNAH, President & CEO) will approve the awarding of gifts for the different types of appreciation along the scale; and
    - Establish a maximum value for each type of appreciation gift.

- Gifts of appreciation may be extended to persons who are not staff of the facility in exchange for pro bono services, including those provided at retreats and professional development events. Gifts must be approved by the appropriate person (i.e. President & CEO or Lead of the department). The names of the non-staff members receiving gifts and the reason for the gifts must be included as supporting

documentation with the expense reimbursement claim.

- The awarding of appreciation gifts may have human resources implications and will be designed in conjunction with the Human Resources Department. *i.e.* recognition pins for years of service.

- All gifts will be appropriately documented, including the individual receiving the gift, the individual who approved the gift, the reasons for the awarding of the gift, the contents and cost of the gift itself, and any other pertinent details. Accurate records must be maintained in order to demonstrate the reasonableness and appropriateness of any gift.

- Token gifts of appreciation, valued at up to $50, may be extended to staff and must be approved by the appropriate authority as long as the total is within their authorization limit. Gift values above $50 must be justified and approved by the President & CEO or Lead or the manager of the department.

- "Gifts" can include flowers, cards, gift certificates, gift cards, etc. but may not include cash, cheques or alcohol.

PROCEDURE
N/A

REFERENCES
Broader Public Sector Expense Directive

Gatekeeper: President & CEO	Last Review Date: September 6, 2023
Next Review Date: September 6, 2024	Last Revision Date: September 6, 2023