

COMMUNITY LIVING ALGOMA

Revised Date: August 25, 2015
Date Last Reviewed: October 21, 2015

Approvals:

Executive Director Signature



Director Finance & Administration

PROCEDURE

EXPENSE RULES – CONSULTANTS and OTHER CONTRACTORS:

Definitions

As defined in the Broader Public Sector Accountability Act (BPSAA) consulting services means the provision of expertise or strategic advice that is presented for consideration and decision-making. Consulting services include services like facilitating the development of a strategic plan, or a plan to restructure management or the agency.

Other Contracted Services would include services like auditing, insurance, information technology (IT), trainers, guest speakers, or other service providers (eg. psychologists, therapists).

Contract

A contract is the formal written agreement which legally binds Community Living Algoma (CLA) and another party. The contract details the conditions under which services are being provided and paid.

At minimum the Purchase of Service contract shall provide the following information:

- Term of the agreement
- Type of service to be provided, expected outcomes, and reporting requirements
- Financial obligations, invoicing procedure and payment schedule – the BPSAA rules regarding expenses not allowed for reimbursement* (see below) will also be highlighted
- CLA staff who will monitor services provided and approve payments
- Confidentiality expectations and signing of Oath of Confidentiality
- Termination clause

*** Expenses not allowed – Hospitality, incidental, and food expenses:**

The expenses incurred by Consultants and Other Contractors shall form part of the cost of their engagement fee.

Under no circumstances can hospitality, incidental, or food expenses be considered allowable expenses for consultants or other contractors. They cannot claim or be reimbursed for expenses including meals, snacks, beverages; gratuities; laundry or dry cleaning; valet services; dependent care; home management; personal telephone calls.

Reimbursement of allowable expenses can be claimed and reimbursed only when specifically provided for in the contract. Due to our geographic location travel expenses (flight, hotel, ground transportation) may be reimbursable but must be specifically listed in the contract.

Signing of Contracts:

Purchase of Service Contracts with Other Contractors can be signed by Directors where the contract is valued at less than \$10,000; the Executive Director will sign contracts from \$10,000 to \$100,000 if within budget allotments; the Board will approve any contract over \$100,000.

Contracts for Consultants are to be signed by the Executive Director when up to \$50,000, or the Board Chair if over \$50,000.

Location of Signed Contracts

Signed contracts are to be given to the Manager of Finance to ensure adherence.

Forms

An agreement may be provided by the vendor, or a template for a Purchase of Service Agreement can be obtained on the G: drive from the Staff Documents subdirectory.