



SSMRCA May Board Meeting

Sault Ste. Marie Region Conservation Authority

May 16, 2023 at 4:45 PM EDT

1100 Fifth Line East / ZOOM

Agenda

I. Call to Order

II. Declaration of a Conflict of Interest

III. Adoption of Agenda

RECOMMENDED:

THAT the agenda be adopted as presented.

IV. Delegations

There are no requests for delegations received for this meeting.

V. Public Input (3 minutes per speaker)

VI. Finance and Administration

A. Adoption of Regular Meeting Minutes of April 18, 2023

RECOMMENDED:

THAT the Regular Meeting Minutes of April 18, 2023, be adopted.

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B. Accounts Payable

RECOMMENDED:

THAT the list of accounts payable from April 14 to May 11, 2023, cheque #8537 to #8569 in the total amount of \$128,740.55 be received as information.

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C. 2023 Budget Update

RECOMMENDED:

THAT the staff memo titled "2023 Budget Update" dated May 16, 2023, be received as information, be approved.

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VII. Water and Related Land Management

A. Application Approvals: Section 28, Ontario Regulation 176/06, Development, Interference with Wetlands and Alterations to Shorelines & Watercourses

RECOMMENDED:

THAT the summary of the 7 site reports approved by staff from April 14 to May 12, 2023, pursuant to *Ontario Regulation 176/06*, be received as information, be approved.

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VIII. Correspondence

There was no correspondence received for this meeting.

IX. New Business and Other

A. General Manager's Report

RECOMMENDED:

THAT the General Manager's Report of May 16, 2023, be received as information.

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B. Communications Update

RECOMMENDED:

THAT the Communications Update of May 16, 2023, be received as information.

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C. 2023 Review of Health and Safety Program Manual - Section 7 & Section 8

RECOMMENDED:

THAT Section 7 and Section 8 of the SSMRCA Health and Safety Program Manual be approved as worded.

Page 16

D. 2023 Review of Human Resources Policies and Procedures - Financial Section

RECOMMENDED:

THAT the Financial Section of the SSMRCA Human Resources Policies and Procedures be approved as worded.

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X. Closed Session

To approve the minutes of a previous closed session.

XI. Adjournment

For members of the public interested in attending this meeting, please contact the General Manager, Corrina Barrett, at cbarrett@ssmrca.ca to make arrangements. Thank you in advance for your cooperation.



SSMRCA March Regular Board Meeting Minutes

Sault Ste. Marie Region Conservation Authority

April 18, 2023 at 4:45 PM EST

@ 1100 Fifth Line East / ZOOM

Attendance

Present

Members: Sandra Hollingsworth (Chair), Corey Gardi (remote), Ron Zagordo (remote), Marchy Bruni (remote)

Also Present: Corrina Barrett (General Manager)

Guests: Jennifer Archambault (BDO)

I. Call to Order

Meeting was Called to Order at 4:46 p.m.

II. Declaration of Conflict of Interest

None.

III. Adoption of Agenda

THAT the agenda be adopted as amended.

Motion: # 57/23

Motion moved by Corey Gardi and motion seconded by Marchy Bruni. **CARRIED.**

IV. Delegations

There are no requests for delegations received for this meeting.

V. Public Input (3 mins per speaker)

None.

VI. Finance and Administration

A. Adoption of Regular Meeting Minutes of March 28, 2023

THAT the Regular Meeting Minutes of March 28, 2023, be adopted.

Motion: # 58/23

Motion moved by Marchy Bruni and motion seconded by Corey Gardi. **CARRIED.**

B. Health and Safety Meeting Minutes

THAT the Health & Safety Meeting Minutes of April 13, 2023, be received as information.

Motion: # 59/23

Motion moved by Ron Zagordo and motion seconded by Marchy Bruni. **CARRIED.**

C. Accounts Payable

THAT the list of accounts payable from March 21 to April 13, 2023, cheque #8509 to #8536 in the total amount of \$20,252.15 be received as information.

Motion: # 60/23

Motion moved by Marchy Bruni and motion seconded by Corey Gardi. **CARRIED.**

D. First Quarter Statistics

THAT the staff memo titled "Property Inquiries – 2023 1st Quarter Statistics" dated April 18, 2023, be received as information, be approved.

Motion: # 61/23

Motion moved by Ron Zagordo and motion seconded by Corey Gardi. **CARRIED.**

E. BDO Audit Presentation

THAT the 2022 Financial Statements and Final Report as presented by the firm of BDO be accepted and finalized.

Motion: # 62/23

Motion moved by Marchy Bruni and motion seconded by Ron Zagordo. **CARRIED.**

VII. Water & Related Land Management

A. Application Approvals: Section 28, Ontario Regulation 176/06, Development, Interference with Wetlands and Alterations to Shorelines & Watercourses

THAT the summary of the 8 site reports approved by staff from March 18 to April 13, 2023, pursuant to Ontario Regulation 176/06, be received as information, be approved.

Motion: # 63/23

Motion moved by Corey Gardi and motion seconded by Ron Zagordo. **CARRIED.**

VIII. Correspondence

A. Fourth Quarterly Report to the Province – O. Reg. 687/21

THAT the correspondence to the province re: Fourth Quarterly Report – O. Reg. 687/21 be received as information.

Motion: # 64/23

Motion moved by Corey Gardi and motion seconded by Marchy Bruni. **CARRIED.**

IX. New Business & Other

A. General Manager's Report

THAT the General Manager's Report of April 18, 2023, be received as information, be approved.

Motion: # 65/23

Motion moved by Ron Zagordo and motion seconded by Marchy Bruni. **CARRIED.**

B. Soo Finnish Nordic Ski Club Agreement Renewal

THAT the Board receive the draft Agreement with the Soo Finnish Nordic Ski Club as information, and

Further THAT the draft Agreement be finalized and approved by the Board for signatures.

Motion: # 66/23

Motion moved by Ron Zagordo and motion seconded by Marchy Bruni. **CARRIED.**

C. 2023 Review of Health and Safety Program Manual - Section 5 & Section 6

THAT Section 5 and Section 6 of the SSMRCA Health and Safety Program Manual be approved as worded.

Motion: # 67/23

Motion moved by Corey Gardi and motion seconded by Ron Zagordo. **CARRIED.**

D. 2023 Review of Human Resources Policies and Procedures - Benefits Section

THAT the Benefits Section of the SSMRCA Human Resources Policies and Procedures be approved as worded.

Motion: # 68/23

Motion moved by Ron Zagordo and motion seconded by Marchy Bruni. **CARRIED.**

X. Closed Session

THAT the Board move into Closed Session to discuss the security of the property of the CA, and personal matters about an identifiable individual at 5:58 p.m., be approved.

Motion: # 69/23

Motion moved by Ron Zagordo and motion seconded by Marchy Bruni. **CARRIED.**

THAT the Board come out of Closed Session at 6:05 p.m., be approved.

Motion: # 70/23

Motion moved by Marchy Bruni and motion seconded by Corey Gardi. **CARRIED.**

XI. Adjournment

There being no further business,

THAT the meeting be adjourned at 6:05 p.m., be approved.

Motion: # 71/23

Motion moved by Ron Zagordo and motion seconded by Marchy Bruni. **CARRIED.**

Corrina Barrett,
General Manager

Sandra Hollingsworth,
Board Chair

Conservation Authority Account Payables - Apr. 14 to May 11, 2023

Chq #	Payable to	Particulars	Amount
8537	PUC Services	Feb. 9 to Mar. 10 PUC services - Fort Creek	68.06
8538-8544	Bi-weekly Payroll	Bi-weekly pay period ending Apr. 15	11,670.13
8545	Shaw Cablesystems	May 8 to June 7 Internet & Fax services	176.22
8546	Marsh Canada	Apr. 2023 to Mar 2024 insurance	68,931.64
8547	Sevice Master Clean	Apr. office cleaning services	226.00
8548	Algoma Office Equipment	Mar. 15 to Apr. 15 copier service & maintenance	51.42
8549	OMERS	Apr. pension contributions remittance	6,360.22
8550	Receiver General	Apr. payroll tax remittance	10,250.26
8551	Service Rentals and Sales	Rental of equipment for Shop septic repair	72.39
8552	Bell	Apr. 7 to May 6 Shop telephone	50.86
8553	Prince Township	May 2nd property tax installments	182.77
8554	City of Sault Ste. Marie	May 5 property tax installments	4,473.00
8555	Testmark Laboratories	Apr. routine Office water testing	45.20
8556	Sun Life Assurance Company	May health insurance	3,022.01
8557	Enbridge Gas	Mar. 16 to Apr. 13 Office & Shop heat	386.49
8558	PUC Services	Feb. 24 to Mar. 28 PUC services - Office & Shop	594.71
8559	Home Hardware	Shop equipment maintenance, new faucet for Sugar Shack	212.20
8560-8566	Bi-weekly Payroll	Bi-weekly pay period ending Apr. 29	11,475.34
8567	S. & T. Group	May Office & Shop security monitoring services	38.42
8568	PUC Services	Mar. 10 to Apr. 12 PUC services - Fort Creek	67.04
8569	BDO Canada L.L.P.	Professional services re SSMRCA's year ending Dec. 31, 2022	10,386.17
Total			128,740.55



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MEMO

Date: May 16, 2023

To: Chair and Members
Conservation Authority Board

From: Corrina Barrett
General Manager

Re: **2023 Budget Update**

The attached budget reflects revenues and expenditures for the first four months of 2023. Spending is on track but for the notable exceptions as follows:

- a) Conservation Ontario levy is split into 2 payments and one payment has been made to date.
- b) Computer Maintenance is up as many annual payments have been taken out already.
- c) Telephone, utilities and heat are all up slightly due to increases in costs. Heat should not increase anymore until the fall.
- d) Office cleaning is up as we have a cleaner coming in once a month. This cost is shared with the SSMNPB, who we bill quarterly.
- e) Insurance has been fully expensed and was lower than originally anticipated (resulting in a cost savings).
- f) Property taxes is on track and dependent on when the municipality invoices (invoiced quarterly with the first and second quarter having been paid).
- g) Forest Management is a one-time fee.
- h) Vehicle Licensing & Inspections are higher than anticipated due to costs associated with inspection related repairs that were needed to both vehicles.
- i) Operations Centre expenses are up as there was a septic issue that has since been remedied.
- j) Miscellaneous N/G Expenses are up due to legal fees that should be recuperated once appropriate agreements are in place.
- k) SPC Meetings Expenses includes per diem payments that were made to SPC members in March. The remainder of the per diem payments will be made in December.

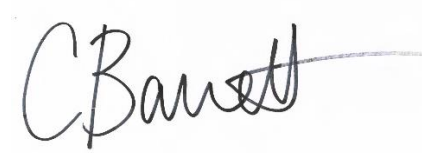
Currently we are just slightly over our expected target with the overall monthly spending sitting at 35% spent of the allocated budget, where we would have expected to be at 33% by the end of April. Although some areas in the budget have gone over their proportionate amounts, other areas will end up coming in under and offset the overages (such as a reduction in travel and office cleaning supplies). Current low cost areas, such as Members

Allowance, Signage and Snow Plowing, anticipate full allocation of funds before the end of 2022.

Recommendation:

THAT the staff memo titled "2023 Budget Update" dated May 16, 2023, be received as information, be approved.

Respectfully submitted for information,

A handwritten signature in black ink, appearing to read "C Barrett", with a long horizontal flourish extending to the right.

Corrina Barrett,
General Manager

2023 SSMRCA BUDGET & Actuals

Expenses	2023 Approved Budget	Jan 1 to Apr 30, 2023 Actuals	% Spent	
Staff Wages	\$ 440,500.00	\$ 132,180.71	30%	
Benefits	\$ 123,500.00	\$ 41,375.51	34%	
Members Allowance	\$ 504.70	\$ -	0%	
Conservation ON Levy	\$ 18,000.00	\$ 8,775.00	49%	Charged in 2 installments
Office Equipment Purchase	\$ 5,613.50	\$ -	0%	
Uniforms	\$ 499.55	\$ -	0%	
Postage	\$ 525.30	\$ -	0%	
Office Supplies	\$ 1,802.50	\$ 82.70	5%	
Alarm system maintenance	\$ 630.36	\$ 138.40	22%	
Office Equipment Maintenance	\$ 1,575.90	\$ 172.68	11%	
Computer/Software/Hardware Maintenance	\$ 7,984.56	\$ 4,712.59	59%	Some of these include fees for the entire year
General Printing	\$ 262.65	\$ -	0%	
Telephone	\$ 1,800.00	\$ 735.97	41%	
Public Utilities	\$ 2,475.00	\$ 1,002.66	41%	
Heat	\$ 1,287.50	\$ 864.23	67%	Coming out of winter this should stay at its current level
Office Cleaning	\$ 525.30	\$ 848.65	162%	We now have a cleaner coming in once a month. Sharing cost with the SSMNPB.
Audit Fees, Bank Service Fee	\$ 9,012.50	\$ 525.25	6%	
Memberships	\$ 447.02	\$ -	0%	
General	\$ 2,363.85	\$ 55.46	2%	
Staff Training	\$ 1,575.90	\$ 475.00	30%	
Staff Travel and Mileage	\$ 9,785.00	\$ 874.17	9%	
Insurance (property, vehicle, liability)	\$ 79,689.00	\$ 68,931.64	87%	Paid in full
Property Tax	\$ 20,600.00	\$ 9,356.31	45%	On track, dependent on municipal invoicing
Forest Management (seed storage)	\$ 51.50	\$ 34.76	67%	Paid in full
Vehicle Licensing & Inspection	\$ 1,050.60	\$ 849.75	81%	Inspections for the entire year
Signage/trail expenses	\$ 4,120.00	\$ -	0%	
2020 Truck Lease -Payment \$579.75/mth	\$ 7,210.00	\$ 2,088.32	29%	
Vehicle & Equipment Repair & Maintenance	\$ 9,980.70	\$ 2,370.06	24%	
Regulation Expense	\$ 2,101.20	\$ 186.80	9%	
Flood Control Operation - expenses	\$ 2,626.50	\$ 62.46	2%	
Operations - Utilities	\$ 5,778.30	\$ 1,585.56	27%	
Routine Maintenance - expenses	\$ 10,506.00	\$ 443.92	4%	
Flood Forecasting wages + expenses	\$ 9,980.70	\$ 2,660.19	27%	
Data Collection - expenses	\$ 2,101.20	\$ 79.12	4%	
Communications - expenses	\$ 5,253.00	\$ 1,329.44	25%	
Operations Centre - expenses	\$ 6,303.60	\$ 3,283.84	52%	Septic issues that have been resolved
Plan Input Services	\$ 4,202.40	\$ 573.09	14%	
Snow Plowing	\$ 4,202.40	\$ -	0%	
Miscellaneous N/G Expenses	\$ 5,253.00	\$ 2,885.77	55%	
SPC Meeting Expenses (2/year)	\$ 1,260.72	\$ 783.32	62%	Includes SPC per diems paid in March
Capital Purchases	\$ -	\$ -	N/A	
NEW - Mandated reports (CA)	\$ 15,000.00	\$ -	0%	
TOTAL EXPENDITURES	\$ 827,941.91	\$ 290,323.33	35%	

Revenues	2023 Budget	2023 Actuals	% Received	
MNRF Levy	\$ 68,113.00	\$ -	0%	
City of SSM Levy	\$ 557,001.45	\$ 278,500.72	50%	
SSM Special Levy	\$ -			
Prince Levy	\$ 6,622.00	\$ 6,622.00	100%	Paid in Full
Grass Cutting - City/Bd of Ed.	\$ 2,500.00	\$ -	0%	This will start in May/June
Development Regulations	\$ 35,000.00	\$ 14,265.92	41%	Gross development reg. revenue
MOECC - DWSP (estimate)	\$ 119,000.00	\$ 74,594.00	63%	
Miscellaneous N/G Revenue	\$ 25,000.00	\$ 9,660.27	39%	Misc rev, land lease, Sshack, SSMNPB lease
MNRF - Summer Student Wage Rebate	\$ 14,705.46	\$ -	0%	Approved for \$10,024 or 8 weeks
TOTAL REVENUES	\$ 827,941.91	\$ 383,642.91	46%	



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MEMO

Date: May 16, 2023

To: Chair and Members
Conservation Authority Board

From: Corrina Barrett, General Manager

Re: **List of Application Approvals: April 14 to May 12, 2023**

The following is a list of the 7 applications that were approved to date since April 14, 2023:

Permit #	Subject Property	Category #	Fee (\$)
USM 23-04-18	4827 Second Line West	5	635.00
RR 23-04-24	132 Whitepine Court	5	635.00
FC 23-04-25	337 Northland Road	5	635.00
EDC 23-04-20	1078 People Road	1	92.00
USM 23-05-04	324 Pine Shore Drive	4	385.00
USM 23-05-02	284 Pointe Louise Drive	1	92.00
BCC 23-05-08	2467 Base Line	5	635.00
		TOTAL	3,109.00

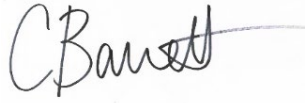
Please note that this list does not include any revisions, renewals, or PDTAs that took place during the same time period (except for the items noted).

In the interest of saving paper and ink, these approvals have not been printed out for this Board meeting. The corresponding Site Reports were shared with the Board electronically prior to the Board Meeting.

Recommendation:

THAT the summary of the 7 site reports approved by staff from April 14 to May 12, 2023, pursuant to *Ontario Regulation 176/06*, be received as information, be approved.

Respectfully submitted for information and approval,

A handwritten signature in dark ink, appearing to read 'C Barrett', with a long horizontal flourish extending to the right.

Corrina Barrett,
General Manager



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MEMO

Date: May 16, 2023
To: Chair and Members
Conservation Authority Board
From: Corrina Barrett
General Manager
Re: **General Manager's Report**

CONSERVATION ONTARIO

Board members should have received the Conservation Ontario Council Meeting e-Bulletin on April 27, 2023, which summarized the agenda topics from the Annual General Meeting, including the new Directors. Access to the CO Members pages will be supplied upon request to the GM.

The next CO Council meeting will take place on June 26th and will be an electronic meeting.

STAFFING

The SSMRCA has been approved for the hiring of 2 youth positions (Labourer, Grounds Maintenance) for the summer of 2023 by the Canada Summer Jobs Program. As a not-for-profit, the SSMRCA is eligible for up to 100% of the provincial or territorial adult minimum hourly wage and all associated Mandatory Employment Related Costs (MERCs) for the two youth for a period of 8 weeks (although we plan to employ the youth for 10 weeks total). The job has been posted and applications are currently coming in until June 1st.

UPCOMING TRAVEL FOR GM

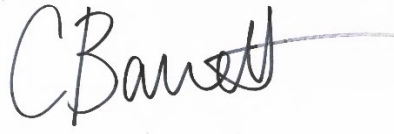
The GM will be travelling to Thunder Bay from June 6th to 8th for the first in person Lake Superior Partnership Working Group Meeting since 2019. The various working group committees will report out on their projects, future ideas, and new workplans. The GM will also use some of this time to visit the office of the Lakehead Region Conservation Authority, who are also members of the Working Group.

The GM will be travelling to the Kingbridge Centre in King City for a two-day General Managers Strategy Session on Tuesday, June 27th and Wednesday, June 28th.

Recommendation:

THAT the "General Manager's Report" dated May 16, 2023, be received as information, be approved.

Respectfully submitted for information,

A handwritten signature in black ink, appearing to read 'C Barrett', with a long horizontal flourish extending to the right.

Corrina Barrett,
General Manager



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MEMO

Date: May 16, 2023

To: Chair & Members
Conservation Authority

From: Christine Ropeter

Re: **Communications Update**

2023 City Nature Challenge

The SSMRCA, City of Sault Ste. Marie and the Sault Naturalists partnered together for 2023 City Nature Challenge - Sault Ste. Marie which took place April 28 – May 1, 2023. This event is a global competition with over 450 cities around the world competing to gather the most observations about nature, local plants, and wildlife. On May 8th it was announced that **La Paz, Bolivia** was this year's winner of the City Nature Challenge with 126,813 observations!

Total Global Challenge Results:

- 1,870,763 Observations
- 66,394 Identifiers
- 57,227 species documented including threatened or endangered species.
- 46 Countries
- 482 Cities

Sault Ste. Marie Results

- 656 observations
- 111 identifiers
- 221 species
- 36 observers

Participants in Sault Ste. Marie who registered for the event and submitted five (5) observations, including identification, were entered into a draw to win a \$100 gift card from Great Lakes Outfitters, donated by the SSMRCA. The winner of the gift card was **Tiina Pajos Weise**.

Sault Ste. Marie Science Carnival

SSMRCA staff members Christine Ropeter and Marlene McKinnon attended the Sault Ste. Marie Science Carnival on April 29, 2023, at the Canadian Bushplane Heritage Centre

The Booth activity consisted of:

1. Test your knowledge. "Where do you Live in the Watershed"? Participants were asked to pin their home location on a flood map and find out what watershed they live in and what their general flood risks are. Additional information included where to find local flood forecasting messages on the SSMRCA webpage (and what they mean), simple steps to prevent flooding from damaging your home.
2. The booth also featured the Source Water Protection game "We use that Much" and information about the Sault Ste. Marie Region Source Protection Plan and "Why We Need to Protect Water".

We included a draw for 10 water bottles with the slogan "Water is life. Protect Yours." According to the Science North organizers, approximately 1,400 people attended this event.

Emergency Preparedness Showcase

The SSMRCA was scheduled to attend the Emergency Preparedness Showcase, outside the Mill Market in the parking area on May 6, 2023. This event was cancelled due to rain and Lauren Perry, Community Emergency Management Coordinator doesn't anticipate being able to reschedule this year.

Respectfully,

Christine Ropeter
Assistant Manager/Communications



SAULT STE. MARIE REGION CONSERVATION AUTHORITY

HEALTH & SAFETY PROGRAM MANUAL

Approved by the SSMRCA Board: December 18, 2018

Most recent revision: December 2021

Edited in 2021 using Word in Office 365

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SECTION 7: RETURN TO WORK POLICY AND PROCEDURE

Return to Work Policy Statement

The SSMRCA will make every reasonable effort to provide suitable return to work opportunities for every employee who is unable to perform his or her regular duties following a work-related injury or illness.

Purpose

The SSMRCA will make every effort to help an injured employee to stay at work (SAW) or to return to work (RTW). This procedure applies to all employees with an injury, illness or disability regardless of its cause, type or nature which results from absence from work.

Roles and Responsibilities

Employer

- Get first aid immediately, if needed.
- The employer arranges and pays for transportation for medical care, if needed.
- The employer pays wages for day of injury.
- The employer reports the injury/illness to the WSIB within three days if it
 - involves: health care treatment, time off work or lost wages using form 7.
- Investigate the accident.
- Contact your worker as soon as possible after the injury.
- Maintain communication throughout their recovery and return to work,
- Attempt to provide **suitable work**. In other words, work that:
 - Is safe and within the worker's (functional) physical capabilities
 - The worker has the skills to do (or can acquire the skills to do)
 - Restores the worker's pre-injury earnings as closely as possible.
- With the worker, develop a RTW plan following the injury using the functional abilities on the second page of the WSIB Form 8, issued to the worker by the initial treating practitioner.
- Document the RTW plan and provide a copy to the worker and WSIB.
- Provide a Return to Work package to the worker (doctor letter, Functional Abilities Form (FAF), date for meeting on return to work, letter to Health Professional, letter of offer) as applicable. Provide timelines to the worker for the prompt return of the Functional Abilities Form for ongoing treatment.
- Review the RTW plan to ensure it is current and reflects the worker's functional abilities. If changes are needed – revise the RTW plan, copy the worker and WSIB.
- Monitor the progress of the employee's modified duties through bi-weekly meetings with the employee and supervisor. Ensure medical follow-up is obtained at a pre-arranged schedule (as determined in the RTW plan).

Supervisor

- Advise the employee of the availability of transitional work and provide the required forms.
- Assist in the creation of and support the employee's RTW plan.
- Maintain communication with the employee on modified duties and monitor their progress and the effectiveness of the plan.
- Inform other employees in the department as may be required.
- Communicate and assist in the evaluation of the plan's effectiveness through regular meetings scheduled with the employee.
- Communicate with the injured worker regularly and, document the communication.
- Schedule bi-weekly sit-down meetings with the employee (injured worker), as appropriate.

Employee

- Report the injury to employer or supervisor.
- Get proper medical treatment immediately following a work-related injury or illness and follow the recommendations of the health professional.
- Return to work after the injury with the second page of the Form 8, to discuss functional abilities and workplace duties.
- Take RTW package provided by the employer to a health professional and return the FAF as soon as possible, as instructed by the employer, for medical follow-up appointments.
- Complete a Form 6 Worker's Report of Injury and return the Form 6 to the WSIB.
- Be in regular contact with the supervisor.
- Take an active role in developing a RTW plan.
- Communicate any concerns to the employer or supervisor.
- Obtain the necessary forms from the treating health care professional, as may be required, by the employer.
- Ensure that appointments with health care professionals are continued while on modified duty. These appointments are to be arranged whenever possible during non-work hours.
- Co-operate with all requests for documentation as required by the WSIB and the Employer.
- Attend all scheduled RTW meetings.
- Communicate any changes / modifications needed to the RTW plan to the supervisor as soon as they are known.

Health Professional(s)

- Provide up to date functional abilities information, initially on the Form 8 or as requested on the Functional Abilities Form (FAF).

- Fill in the forms, as requested.

Workplace Safety and Insurance Board (WSIB)

- Process information on a timely basis to provide service and support to employer and employee
- Act as a resource regarding functional abilities, the suitability of modified work.

Reporting requirements to the WSIB

- Wage changes
- Changes in duties/duration of program
- Failure to cooperate; failure to provide required / requested information
- End of modified duties

Communication

Revisions or modifications of this procedure will be communicated to the supervisor. The supervisor will then communicate any revisions to their employees immediately, if required, or at the next scheduled team meeting. A quarterly summary of injuries / illnesses will be prepared by the supervisor and submitted to the employer for review and corrective action, as needed. This procedure will be reviewed annually. Only the employer has the authorization to make any changes to the procedure. The method of communication referred to in the RTW Plan includes phone, fax or written. Any phone contact must be documented. Employers, supervisors and employee (injured worker) are responsible for maintaining the documentation on the RTW plan.

Training

Employer will ensure that employees know and understand the RTW policy and procedure within 2 days of hire. This policy and the return to work process will be reviewed by all employees on an annual basis, or as required.

SECTION 8: ACCOMMODATION POLICY AND PROCEDURE

Accommodation Policy Statement

The Sault Ste. Marie Region Conservation Authority (SSMRCA) is committed to providing inclusive, barrier-free employment, facilities, and services that are free from discrimination as required under the SSMRCA's Workplace Violence and Harassment Prevention Policy, the Ontario Human Rights Code (Code) and the Accessibility for Ontarians with Disabilities Act (AODA).

The goal of the SSMRCA's Accommodation Policy is to foster an inclusive community and workplace. The SSMRCA will fulfil its duty to accommodate by promoting inclusive employment practices, facilities, and service provision, and by exploring accommodation for persons and/or groups who request it based on the prohibited grounds in the Code.

Application

This policy applies to all employment policies, programs, practices, systems, communications, the use of facilities, and provision of all SSMRCA services.

Principles

The SSMRCA recognises its duty to accommodate to the point of undue hardship and commits itself to an accommodation process that respects the Code principles of dignity and privacy, inclusion, and individualization.

The SSMRCA's commitment extends to all aspects of employment, use of facilities and the provision of services. Employment activities include: recruitment, assessment and selection, orientation, working conditions, promotion, training, performance management, career development, workforce transition, leaves of absence, return to work and redeployment. It also includes the purchase and management of information technology and communication systems, development and management of information services, decisions relating to real estate/property and purchases of internal fittings (e.g., chairs, desks, lights, etc.), and to the organization of conferences, seminars, and training. Accommodation of service recipients relates to all aspects of service delivery, including the provision of accessible and inclusive buildings, information, communications, systems, policy/program design and modifications, etc.

Systemic Assessments

The proactive review of existing policies, rules, practices, and procedures to identify and eliminate barriers to access and inclusion. Ensuring policies, standards and practices are barrier-free can minimize the need for individual assessments/accommodation.

Individual Assessment

Accommodation is assessed and delivered on an individual basis for persons who make their needs known. Each request must be considered individually in order to assess appropriate accommodation. Requests for accommodation must be dealt with in a timely manner so individuals can fully participate in all aspects of employment, use of facilities, and service provision, except where evidence does not support the need for accommodation or where undue hardship can be demonstrated.

Dignity and Privacy

Individuals must be accommodated in ways that respect their dignity and right to privacy. Information relating to specific requests for accommodation will be treated as confidential and will only be used for the purpose of assessing and implementing accommodation options and solutions. The SSMRCA will comply with all privacy, confidentiality and security requirements of the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA).

Inclusion

Ensures programs, policies, systems, facilities, services, etc. are designed and administered to foster the full integration of diverse individuals and groups protected under the Code.

Legal Obligations and Limits

Exploring accommodation is a legal obligation for all employers, facility and service providers under the Code and related jurisprudence; failure to explore requests for accommodation in good faith related to any of the Code's prohibited grounds may constitute discrimination and a breach of the Code. Even where it is determined that accommodation is not required, employers have a legal duty to fully explore every request for accommodation in good faith.

Definitions

Accessibility

Means access. It refers to the absence of barriers that prevent individuals and/or groups from fully participating in all aspects of employment and service provision. The term is often linked to people with disabilities and their rights to access.

Barriers

With respect to discrimination, it includes attitudes and designs that prevent people from fully participating in employment, use of facilities, and service provision. Individuals and groups can experience discrimination as a result of physical (building design), attitudinal (stereotypes or prejudices) or systemic barriers. Systemic barriers are formal or informal policies, practices or rules which, when applied in the same way to everyone, may have the effect of excluding or restricting the participation of some individuals, e.g., a work schedule or community meeting that conflicts with religious observance requirements.

Duty to Accommodate

The obligation of an employer, facility, and service provider to take steps to eliminate the disadvantage caused by systemic, attitudinal, or physical barriers that exclude individuals or groups protected under the Code from participating in all aspects of employment, use of facilities and service provision. There is a procedural obligation to explore all accommodation options, and a substantive obligation to implement an accommodation that is reasonable. Every accommodation request must be fully considered, and may be refused only if no Code-related need is substantiated or if undue hardship can be demonstrated.

Employee(s):

For the purpose of this policy, reference to “employee(s)” shall also be read to include volunteers and students.

Employment Accommodation:

1. **Universal Accommodation** – A proactive process of identifying and eliminating barriers for everyone. This can be done through the initial design of and/or modifying facilities, policies, programs, procedures and practices, and ensuring that potential barriers are identified and removed. In some cases, new policies, programs, procedures and practices are required to eliminate barriers and achieve equitable outcomes.
2. **Individual Accommodation** – An adaptation or adjustment that may be required to enable an employee to perform his or her essential job responsibilities effectively and/or a service recipient to participate in SSMRCA programs. For employees, this may involve purchasing equipment, modifying some duties or hours of the job, reassignment of the employee, or providing additional supports such as sign language interpretation. For service delivery, this may involve modifying facilities and programs, ensuring program delivery does not conflict with religious requirements/sincerely held beliefs, the provision of communications in alternative formats, making attendant care available, etc.

Protected/Prohibited Grounds

Protections in the Code, that every person has the right to equal treatment on the basis of the following: race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, gender identity, gender expression, receipt of public assistance, sexual orientation, age, record of offences, marital status, family status, or disability.

Undue Hardship

Refers to the extent to which an employer, facility and/or service provider must attempt to accommodate the needs of an employee, job applicant and/or service recipient who has demonstrated that accommodation is required on grounds protected in the Code.

Bona fide accommodation requests require more than a minimal effort on the part of the SSMRCA. The SSMRCA must take all reasonable steps to determine if an employee, job applicant and/or service recipient can be accommodated. However, there are limits on how much the SSMRCA is required to do. If the SSMRCA can show that further efforts to accommodate would create undue hardship for it, the SSMRCA has met its legal obligations.

The three factors under the Code that can be considered in determining undue hardship are:

1. cost of the accommodation, i.e., whether or not the cost threatens the viability of the SSMRCA;
2. outside sources of funding, if any, i.e., whether the SSMRCA can access special funding, such as grants to alleviate some of the direct costs of the accommodation;
3. health and safety requirements, if any.

Roles and Responsibilities

SSMRCA Divisions:

- Providing accessible, inclusive, barrier-free employment (programs, policies, procedures, systems, practices), facilities and services that are compliant with Code and AODA requirements

Management and Human Resources:

- Managing the accommodation process by individually assessing requests in good faith, considering all options, resolving disagreements, and documenting, monitoring and evaluating employment, service and facility accommodation solutions
- Ensuring accommodation is incorporated into human resources policies, processes, practices, etc. (e.g., Strategic Recruitment)
- Providing confidential, neutral advice to any party (employee, management, job applicant, service recipient) involved in the SSMRCA accommodation process
- Investigating allegations/complaints of harassment/discrimination regarding the SSMRCA's duty to accommodate

Employees, Job Applicants & Service Recipients:

- Identifying needs and initiating requests for accommodation
- Providing evidence to support accommodation needs and to support the assessment of accommodation options/solutions
- Participating in good faith, in the assessment and implementation of accommodation solutions

Implementation

For more details on requesting and assessing accommodation requests, refer to the Accommodation Procedures and the relevant Guidelines.

ACCOMMODATION PROCEDURES

Introduction

The following procedures have been established so that employees/job applicants, volunteers, students, service recipients and SSMRCA management are familiar with their roles and responsibilities as they relate to the process of exploring and assessing requests for accommodation. These procedures should be read in conjunction with the **SSMRCA's Accommodation Policy**, and with the various guidelines created to address the particular accommodation principles established for responding to requests on the frequently cited protected/prohibited grounds of creed, disability, family status, gender identity/expression and sex (including pregnancy and breastfeeding).

Removing Systemic Barriers

Simple and cost effective accommodation solutions can be found when taking a systemic approach to identifying and removing barriers. However, such barriers are not always apparent and employees/job applicants and service recipients are encouraged to work with management to help identify existing and/or potential barriers.

Accommodation Procedures

1. Assessing and verifying the need for accommodation

Request:

Requester: Those requesting accommodation should focus on the functional limitations that are impacting their ability to apply for work, perform their job, or access SSMRCA services and facilities. For more details see **Understanding Functional Limitations** below.

Individual responding to request (Management, including supervisors and managers): If Management believes there is a need for accommodation not requested by an employee (i.e. they suspect an undisclosed disability), they have an obligation to initiate the accommodation process.

Management documents each stage in the accommodation process using the confidential form to **Request/Document Accommodation Plans**.

Functional Limitations:

Requester: Those requesting accommodation should focus on the functional limitations that are impacting their ability to apply for work, perform their job, or access SSMRCA services and facilities. For more details see **Understanding Functional Limitations** below.

Avoid focusing on preferred accommodation measures at this early stage.

Individual responding to request: Management will determine whether appropriate functional limitations have been identified in consultation with experts as necessary, and if not, will ask the requester to identify appropriate functional limitations. For more details see **Understanding Functional Limitations** below.

Supporting Documentation:

Requester: Requests for accommodation are required to include sufficient information, including objective documentation, to confirm the need for accommodation and the type(s) of accommodation required. Supporting documentation must be verifiable. Examples of verifiable documentation include: a letter from a treating physician identifying functional limitations or a court sanctioned custody agreement setting out child-care responsibilities.

Supporting documentation may not be required for those seeking accommodation on the grounds of gender identity and/or gender expression or creed.

Individual responding to request: Management will review the request and any documentation provided to support the need for accommodation. If the functional limitations are clearly identified and there are no concerns about the supporting documentation, the manager may meet with the requester to discuss accommodation options.

If the functional limitations are not clear and/or there is no supporting documentation, or if the manager has a concern with the content/source of the documentation, they will need to verify the functional limitations. See the '**Follow-up**' section below.

All supporting documentation will be considered strictly confidential.

Follow-up:

Requester: In many cases, the requester will need to provide additional information about their functional limitations after the initial request for accommodation.

Individuals should be prepared to answer questions about their functional limitations and/or provide (additional) documentary evidence.

Individual responding to request: Management may need to verify the identified functional limitations by consulting the employee/service recipient and/or seeking appropriate expertise. For example, management may ask the employee/service recipient for clarification, consult internally, and/or externally (e.g., approved legal counsel). Management questions and requests for additional information should be restricted to the individual's functional capacity and limitations, and the impact they have on the requester's ability to apply for work, perform their job or access SSMRCA services and facilities.

Assessment of Accommodation Request:

Individual responding to request: In some cases, Management may determine that there is insufficient evidence, or that the evidence does not support the need for accommodation. There **may** be no requirement for accommodation if:

- the request is not linked to a protected/prohibited ground in the policy or the Ontario Human Rights Code
- the requester refuses to provide supporting documentation
- the denial of the request does not impose burdens, obligations or disadvantages on the requester

- the functional limitations do not trigger the need for accommodation when reviewed against the essential duties of the job or service being provided
- evidence is received that contradicts the information provided by the employee/resident (particularly if it is received from a subject-matter expert)

Management must be able to demonstrate that the accommodation process was undertaken in good faith and must have evidence to support denying a request. Always consult with approved legal counsel (external) if it is suspected that accommodation is not required. See 'denying request' under section 4 below if evidence confirms that accommodation is not required.

2. Dialogue

Topics of Discussion:

Once the functional limitations are verified, the parties will explore the request further. They are expected to:

- discuss the employment or service related tasks/essential requirements that are impacted
- identify possible accommodation solutions and assess the effectiveness each would have
- identify any costs, benefits or detriments flowing from the alternatives
- discuss timeframes for review and implementation (accommodation plans must be reviewed at least annually)

Creativity:

Try to be creative and identify as many accommodation solutions as possible. Identifying numerous options at this stage will increase the likelihood of successful accommodation.

Identifying Preferred Measures:

Requester. The requester can identify the accommodation measure they prefer but must also be open to exploring other options that effectively accommodate their functional limitations.

Individual responding to request. Management should consider the preferred accommodation measure requested. However, if there is an equally effective accommodation solution, the SSMRCA may choose to proceed with the one that is the least costly, easiest to provide and/or a better fit with operations where it can demonstrate that it meets the need(s) of the requester.

3. Identifying and Implementing the Accommodation Solution

Interim Accommodation

In some cases, it may be necessary to provide interim accommodation while waiting for an accommodation to be put in place or while assessing and exploring a request for accommodation, (e.g., a manager may exempt an employee from some essential duties or arrange to have those duties performed by someone else on a temporary basis).

Assessing Options:

If there is evidence that an accommodation is required and Management determines that the accommodation can be made, it will then need to determine which accommodation option is most feasible. Factors to consider include:

- how well the option respects the dignity of the requester
- how the options compare in dollar value
- whether options are compatible with other systems or the operations of the division
- how difficult the option is to learn or if the requester has successfully used similar accommodations

Selecting Accommodation Measure:

Efforts must be made to ensure that the requester is not disadvantaged by the accommodation measure chosen. Management should choose the option with the least disruption to the requester. However, the circumstances may be such that accommodation cannot be provided without disruption to the requester. In those instances, the requester has an obligation to accept a reasonable accommodation offer. Some examples from the employment context are provided below:

There is no obligation on the part of the SSMRCA to pay for leave required as part of an accommodation (beyond existing leave provisions that form part of the employment contract, including sick leaves). The following are examples of types of accommodation-based leaves that are unpaid: leave required for religious observance; leave required to care for a dependent; or when a medical condition results in a permanent reduced work week. However, employees that require leave from work to accommodate their functional limitations must be provided options that limit the disruption to the employee, including flexible work hours where appropriate, using lieu time, using vacation or accrued sick leave (all with appropriate approval), or using leave without pay (often as a last resort). Consider whether the employee's preferred form of leave can be granted.

The SSMRCA is obligated to fully explore accommodation within an employee's own job. Accommodation outside of the employee's position (e.g., reassignment to a vacant position, if available) may be considered; for example, when the employee cannot perform the essential duties of the position and/or accommodation in the current position would create undue hardship. However, this does not mean that a new job must be created for an employee, nor does the application of this policy constitute a guarantee of continued employment. The SSMRCA is not obligated to accept substandard or less than competent performance from an employee once they have been accommodated.

Although the above are examples from the employment context, the principles also apply to accommodation of service recipients.

Implementation and Review:

Once the accommodation option has been selected the requester will be informed in writing. The chosen accommodation should be implemented as quickly as possible. In most cases it will be necessary to monitor the success of the specific accommodation. It is necessary to review, modify or upgrade accommodations as jobs; services; functional limitations and accommodation options change over time. Accommodations

may also need to be reviewed periodically to assess the impact on the operations of the work unit.

To meet legislative requirements and to ensure accommodation plans are implemented and reviewed consistently, accommodation plans must be reviewed on at least an annual basis.

4. Assessing Undue Hardship and/or Denying the Request:

The duty to accommodate does not create an endless obligation on the SSMRCA. Circumstances of the individual, the co-operation of the requester, the success of accommodation attempts, and (limited to the employment context) the ability to perform the essential duties of the job and performance difficulties will all be relevant to determining where the duty to accommodate ends.

The SSMRCA is not obligated to accommodate employees/service recipients in cases where it can demonstrate undue hardship. The Ontario Human Rights Code sets out three elements to be considered in assessing whether an accommodation would cause undue hardship:

1. Costs

- According to the Ontario Human Rights Commission, over two-thirds of job accommodation cost under \$500; many cost nothing at all. (Policy and guidelines on disability and the duty to accommodate, 2009).
- The determination of cost as an undue hardship is based on the circumstances of the organization as a whole and the nature of the accommodation requested. Costs for the SSMRCA as an employer must be significantly high to be considered an undue hardship. Such costs must be quantifiable and may include capital, operating costs, and the cost of re-structuring.
- Where immediate removal of large-scale barriers would cause undue hardship, the SSMRCA may phase in accommodation gradually. The SSMRCA will make every attempt to provide interim accommodations in such circumstances.

2. Outside Sources of Funding

- The availability of outside sources of funding may alleviate accommodation costs. The SSMRCA must first consider the availability of outside resources before claiming undue hardship. These resources could be funds that may be available to the individual only or directly to the SSMRCA and may be provided through government programs (i.e., programs to improve accessibility for persons with disabilities).

3. Health and Safety

- There may be some situations where a health or safety requirement, legislated or not, effectively excludes someone from employment/accessing SSMRCA services. However, it must be determined whether any health and safety requirement can be waived or modified or if alternatives can be found to protect health and safety.
- If Ontario health and safety laws do not allow a requirement to be waived, an equivalent safety measure may be used. You will need to explain the risks to the

individual if the risk of harm is only to the person making the request. If the accommodation contravenes health and safety legislation and places the person at significant risk, then undue hardship exists.

Imprecise calculations or assumptions about potential costs and/or health and safety implications are insufficient to demonstrate undue hardship. Objective evidence/data showing actual costs and/or actual health and safety impacts are required to meet the undue hardship threshold.

The following factors cannot be considered in determining whether the SSMRCA has reached the point of undue hardship: Business inconvenience or employee morale.

Denying request:

Requester. If a request for accommodation is denied and the individual believes the request has not been handled in accordance with the Accommodation Policy, a number of options are available for the individual:

- discuss the issue with senior management
- lodge a complaint with senior management
- submit a complaint to the Human Rights Tribunal of Ontario

Individual responding to request. Management must consult with approved legal counsel (external) if it assesses that there is no requirement to accommodate (as described under 'assessment' in section 1 above), there are no accommodation options or those proposed cannot be implemented without undue hardship.

Management will then notify the individual in writing with the reason for denying the request.

Understanding Functional Limitations

The following chart includes scenarios to help parties involved in the SSMRCA's accommodation process recognize what does and does not constitute a restriction/functional limitation. The document identifies common misunderstandings regarding the identification of restrictions/functional limitations.

Inappropriate Identification of Functional Limitation(s)	Appropriate Identification of Functional Limitation(s)
<p>Disability: I was just diagnosed with multiple sclerosis and my doctor said I can no longer do my job because it is too physically demanding.</p> <p>Comments: This statement does not identify the employee's functional limitations. Instead, it identifies a</p>	<p>No heavy lifting (above 35 lbs), no prolonged standing (more than 30 minutes), and frequent regular breaks (every 45 minutes)</p> <p>Comments: The above clearly identifies the employee's functional limitations. Management and the employee can review the limitations to determine if the employee's job can be modified to meet the</p>

Inappropriate Identification of Functional Limitation(s)	Appropriate Identification of Functional Limitation(s)
<p>proposed accommodation measure – removal from current position.</p> <p>In addition, those requesting disability accommodation are not typically required to disclose their medical diagnosis, but need to indicate (with a doctor’s note) how the disability-related functional limitation(s) impact their ability to engage in employment activities or access SSMRCA services/facilities.</p>	<p>medical restrictions. If not, it will need to be determined whether the employee is qualified for a vacant position that corresponds to the above restrictions.</p>
<p>Family Status:</p> <p>I need part-time hours so that I can take my father to medical appointments.</p> <p>Comments:</p> <p>This statement focuses on a preferred accommodation measure as opposed to identifying the functional limitation.</p>	<p>I need to take my father to regular doctor’s appointments on Tuesday and Thursday from 1pm-3pm.</p> <p>Comments:</p> <p>The above statement clearly identifies the functional limitations impacting the employee’s ability to perform their job. It allows Management and the employee the opportunity to explore whether accommodation is required, and if so, review all measures that effectively accommodate the employee’s restrictions. In fact, Management may be able to identify an accommodation measure that does not result in a loss of pay for the employee.</p>
<p>Creed:</p> <p>I cannot attend consultation meetings on the weekend as an accommodation.</p> <p>Comments:</p> <p>This statement does not provide enough information to trigger the SSMRCA’s Accommodation Policy. In particular, the individual does not link the request to a protected/prohibited ground in the policy.</p>	<p>I am a seventh-Day Adventist who observes the Sabbath from sundown Friday to sundown Saturday.</p> <p>Comments:</p> <p>This statement clearly links the request for accommodation to the prohibited ground of creed/religion. It provides sufficient information to trigger the accommodation policy. Of note, the actual functional limitation would not restrict scheduling a meeting on Saturday evening or Sunday.</p>
<p>Gender Identity/Gender Expression:</p> <p>I was invited to a job interview. I can attend the interview, but prefer to have the interview over the phone. Can you accommodate me?</p> <p>Comments:</p>	<p>I am so excited about my upcoming job interview with the SSMRCA. However, I am Transsexual and I’m worried about the way the interview panel members may perceive me. I don’t want to lose this opportunity because of who I am.</p> <p>Comments:</p>

Inappropriate Identification of Functional Limitation(s)	Appropriate Identification of Functional Limitation(s)
<p>This request neither identifies the protected/prohibited ground that is the basis of the request, nor does it provide a rational basis for the accommodation measure requested. In addition, this request identifies a preferred accommodation measure as opposed to any functional limitations.</p>	<p>This statement more effectively identifies the concerns the applicant has and the ways in which the human resources representative can provide support. Of note, the above scenario would not require a telephone interview. Instead, the applicant should be informed of the SSMRCA's human rights policies and procedures, as well as its commitment to respectful and equitable employment practices.</p>
<p>Sex – Pregnancy: I need to change my hours from 9am-5pm to 10am to 6pm because of morning sickness.</p> <p>Comments: Morning sickness is an episodic condition that often accompanies pregnancy. There is no rational connection between the request for a permanent shift change and the episodic nature of morning sickness.</p>	<p>I'm struggling with morning sickness and may not be able to get in every morning by 9am, but will make up the time on those days that I am late because of the nausea.</p> <p>Comments: This request appropriately indicates that the effects of morning sickness are sporadic in nature, and the need for accommodation will depend on the actual symptoms of the illness.</p>

Effective Date

December 1, 2021

Sault Ste. Marie Region Conservation Authority

Request/Document Accommodation Plans

Private and Confidential

Applicant Information:

First Name		Last Name	
<input type="checkbox"/> Check this box if First Name and Last Name do not apply to you because you have either a registered Birth Certificate or Change of Name Certificate bearing a Single Name. Provide your name below.			
Single Name			
Street Number	Street Name		Suite/Unit Number
City/Town	Province		Postal Code
Telephone Number		Mobile Number	
Are you an employee of the SSMRCA? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If yes, please indicate your: Work Location: _____		Position: _____	
Work Email: _____		Supervisor/Manager: _____	

Identifying the Accommodation Requirement*

*Please attach a letter if you require additional space

Is your request for accommodation linked to one or more protected/prohibited grounds in the SSMRCA's Accommodation Policy?

☐ Yes ☐ No

If yes, identify the protected/prohibited ground(s):

☐ Creed

☐ Disability

☐ Family Status

☐ Gender expression

☐ Gender identity

☐ Sex (including pregnancy and breast feeding)

☐ Other prohibited ground _____

A. If you are an SSMRCA employee:

What is the specific job duty/requirement you are unable to meet?

What is the barrier or restriction (functional limitation) that prevents you from meeting that job requirement?

B. If you are receiving service from the SSMRCA or using an SSMRCA facility:

What is the specific service or facility location you are unable to access?

What is the barrier or restriction (functional limitation) that prevents you from accessing that service or location?

C. If you are an SSMRCA job applicant:

What part of the job application process are you unable to fully participate in?

What is the barrier or restriction (functional limitation) that prevents you from fully participating in that part of the job application process?

Additional Information

Note that requests for accommodation are required to include sufficient information, including objective documentation, to confirm the need for accommodation and the type of accommodation required. Supporting documentation must be verifiable. Supporting documentation may not be required for those seeking accommodation on the grounds of gender identity and/or gender expression or creed.

See the Accommodation Procedures for more information.

Signature

Date (yyyy-mm-dd)

Office Use Only

Is there a link between the restrictions/functional limitations provided and a protected/prohibited ground (creed, disability, family status, gender expression/identity, sex, etc.)?

☐ Yes ☐ No

Have you reviewed the Accommodation Procedures?

☐ Yes ☐ No

Has the requester clearly identified their restrictions/functional limitations?

If no, identify questions to ask the requester and/or seek expert input from approved legal counsel as appropriate. Document questions and responses and attach to this form.

☐ Yes ☐ No

Has the requester provided adequate information/documentation that supports the requester requires accommodation?

☐ Yes ☐ No

If no, request supporting documentation and/or seek expert input

Note details of who was contacted and what expert input was provided. Attach details of all expert input to this form.

Restrictions/ Functional Limitations

What task(s) or service need(s) are impacted by the restrictions/limitations?

Is the task or service essential? What modification options would ensure the individual is able to perform the task or access the service?			
Is accommodation required? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, contact the requester to discuss accommodation options. Continue to document the process including the steps identified below. If no, Consult with approved legal counsel (external).			
Description of Accommodation Measure(s):			
Requirement(s) or task(s) requiring accommodation			
Objective of the accommodation			
Accommodation strategies & tools to facilitate task(s)			
Costs (if appropriate)			
Roles & Responsibilities:			
Outstanding actions to implement accommodation			
Assigned to: (name/position)			
Due date (yyyy-mm-dd):			
Timeline: Start Date (yyyy-mm-dd) _____ End Date (yyyy-mm-dd) _____ Review Date (yyyy-mm-dd) _____			
Is this plan prepared for an employee with a disability who requires workplace emergency response information? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, indicate date when emergency response information provided to employee: _____			

If an employee, has the requester been provided with an individualized accommodation plan and signed off on the plan? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Manager's Signature	Date (yyyy-mm-dd)
Requester's Signature	Date (yyyy-mm-dd)

Notice of collection

The personal information on this form is collected under the authority of the Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, Chapter 11, Ontario Regulation 191/11, Integrated Accessibility Standards, s. 28, the Ontario Human Rights Code, R.S.O. 1990, Chapter H. 19, Part I and the SSMRCA Accommodation Policy. The information is used to assess and respond to requests for accommodation, and to document individualized accommodation plans. Questions about this collection can be directed to the General Manager, Sault Ste. Marie Region Conservation Authority, 1100 Fifth Line East, Sault Ste. Marie, Ontario, P6A 6J8 or by telephone at 705-946-8530 x 1005.



**Human Resources
Policies and Procedures
Manual**

Updated April 2020

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FORM REFERENCE

STATEMENT OF TRAVELLING EXPENSES OR DISBURSEMENTS FORM 53



FINANCIAL



Section	FINANCIAL
Title	Procurement and Purchasing Policy
Resolution #	Resolution #129/16
Approval Date	January 17, 2017
Revisions	

Procurement and Purchasing Policy

Corporate credit cards are available for use by employees for procuring goods and services on behalf of the Sault Ste. Marie Region Conservation Authority and are strictly limited to CA business transactions only.

All purchases made with a CA corporate credit card are subject to the rules, policies and procedures in the CA purchasing policy.

A CA corporate credit card must not be used for any of the following:

1. personal purchases
2. personal travel and entertainment
3. cash advances
4. alcohol
5. tobacco products
6. any transaction that is not made on behalf of the Conservation Authority

It is the responsibility of the staff member making a credit card purchase to obtain appropriate documentation supporting the purchase.

The supporting documentation, such as a receipt, must be provided to the bookkeeper at the earliest opportunity. A clear description of the item or service purchased, and the purpose of the purchase, must be indicated on the supporting documentation. For example, the purpose of travel must be noted on a travel expense claim. The number of employees covered by the expense must be noted if applicable to more than one staff member.

At the end of each billing cycle, the bookkeeper will reconcile the monthly statement from the credit card company with the receipts and review the documents for correctness prior to authorizing the payment. The general manager will review and initial the reconciled statement.

If transactions can not be verified with the proper documentation, the General Manager has the discretion to allow authorization of payment. If authorization is not granted by the General Manager, the employee incurring the expense will be responsible for payment.



Section	FINANCIAL
Title	Procurement and Purchasing Policy
Resolution #	Resolution #129/16
Approval Date	January 17, 2017
Revisions	

SSMRCA Procurement and Purchasing Policy

This policy commits the Sault Ste. Marie Region Conservation Authority and every individual involved in purchasing within the organization to ensure that our purchasing and contracting activities are:

1. legal;
2. accountable and auditable;
3. ethically, environmentally and socially responsible; and
4. economically effective.

Definitions

"LOWEST COMPLIANT BID" means the Bid that would provide the SSMRCA with the desired Goods, Services or Construction at the lowest Total Acquisition Cost, meets all the specifications and contains no irregularities requiring automatic rejection;

"PROPOSAL" means an offer submitted in response to a Request for Proposal, acceptance of which may be subject to further negotiation;

"PURCHASE ORDER" means a Contract between the SSMRCA and a supplier to supply a specific quantity of Goods or specific set of Services or specific type of Construction defined by such things as time period, location(s) and price;

"REQUEST FOR PROPOSAL" means a Bid Solicitation that is used to acquire Goods, Services or Construction, the suitability of which is dependent upon non-price factors and which may result in further negotiation between the parties;

"SINGLE SOURCE" means selection of a specific Supplier even though there may be more than one supplier capable of delivery of the Goods and Services;

"SOLE SOURCE" means there is only one Supplier capable of delivery of the Goods and Services that meet the requirements of the City;

"SERVICES" includes all professional and consulting services, all services in relation to real property or personal property including without limiting the foregoing the



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delivery, installation, construction, maintenance, repair, restoration, demolition or removal of personal property and real property and all other services of any nature and kind save and except only services to be delivered by an officer or employee of the City of Sault Ste. Marie in accordance with terms of employment;

"TENDER" means a publicly advertised Bid Solicitation;

The procedures in this policy shall be followed to Award a Contract or to recommend to the Board of Directors that a Contract be Awarded.

Purpose

To describe the purchasing policies to be applied to purchases by the Sault Ste. Marie Region Conservation Authority (SSMRCA) through SSMRCA accounts.

Policy Application

The procedures in this policy shall be followed to purchase goods and services, awards contracts and to make recommendations to the Board of Directors regarding purchases, and awarding of contracts.

Restrictions

No Contract for Goods, Services or Construction may be divided into two or more parts to avoid the application of the provisions of this policy.

No Contract for Services shall be awarded where the services would result in the establishment of an employee - employer relationship.

No employee shall purchase, on behalf of the SSMRCA, any Goods, Services or Construction, except in accordance with this Policy.

Where an employee involved in the award of any contract, either on his or her own behalf or while acting for, by, with or through another person, has any pecuniary interest, direct or indirect, in the Contract, the employee,

1. shall immediately disclose the interest to the General Manager involved in the award of the contract and shall describe the general nature thereof;
2. shall not take part in the award of the contract; and



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3. shall not attempt in any way to influence the award of the contract.

An employee has an indirect pecuniary interest in any contract in which the SSMRCA is concerned, if, the employee or his or her spouse:

1. is a shareholder in, or a director or senior officer of, a corporation that does not offer its securities to the public that has a pecuniary interest in the contract;
2. has a controlling interest in or is a director or senior officer of, a corporation that offers its securities to the public that has a pecuniary interest in the contract; or
3. is a member of an unincorporated association or partnership, that has a pecuniary interest in the matter; or
4. the employee or his or her spouse is in the employment of a person, unincorporated association or partnership that has a pecuniary interest in the contract.

An employee found to be in conflict as per this section may be subject to disciplinary action by the SSMRCA.

There will be no local preference for purchases in compliance with the Discriminatory Business Practices Act, Revised Statutes of Ontario, 1990 Chapter D.12 and the Ontario Free Trade Agreement that does not allow for geographical preference as well in accordance with the updated Municipal Act requiring that a competitive bid process be open, fair and transparent.

Approvals for Financial Values

Purchase Orders (purchase over \$500 / cumulative purchases over \$1,000)

A purchase order approved by the general manager is required for the purchase of any contract for a Good, Service or Construction costing over \$500.00, excluding tax.
A purchase order approved by the general manager is required for the purchase of multiple Goods, Services or Construction with a cumulative total over \$1,000.00, excluding tax.



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Quotes (purchase over \$1,000 but less than \$3,000)

Three written quotes are necessary for any contract for a Good, Service or Construction purchase costing over \$1,000.

If three quotes can not be obtained, a written explanation shall be provided. The Good, Service or Construction shall be purchased from the supplier offering the lowest compliant bid. The purchase must be authorized by the general manager by way of an approved purchase order.

Purchases over \$3,000 but less than \$10,000 - Conservation Authority Board Approval

Three written quotes are necessary for any contract for a Good, Service or Construction purchase costing over \$3,000.

If three quotes can not be obtained, a written explanation shall be provided. The Good, Service or Construction shall be purchased from the supplier offering the lowest compliant bid. The purchase must be authorized by the Conservation Authority Board by way of an approved resolution.

Tender / Expression of Interest Process / Request for Proposals and Conservation Authority Board Approval (purchase over \$10,000)

A formal tender process must be followed for the purchase of any Good, Service or Construction costing over \$10,000, unless otherwise explicitly approved by the CA Board.

The tender or request for expression of interest or request for proposal must be publicly advertised - advertising may include newspaper, web site listings and other forms of electronic advertising with a submission deadline and submission method clearly identified.

All Bidders, Suppliers and Contractors who provide Goods, Services or Construction to the SSMRCA shall comply with the Accessibility for Ontarians Act, 2005, and all Regulations emanating therefrom.

Tenders must be opened in the presence of two staff members, or one staff member and one CA Board member if the Board so directs. The recommendation of staff based on the submissions will then be presented to the CA Board for consideration. Supporting documentation such as the tender documents submitted will be available to the CA Board



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for review upon request. The purchase or retention of services must be authorized by the Conservation Authority Board by way of an approved resolution.

Request for Proposals may be submitted electronically via email in secured pdf format. The recommendation of staff based on the submissions will then be presented to the CA Board for consideration. Supporting documentation such as the request for proposal documents submitted will be available to the CA Board for review upon request. Engagement of a contractual arrangement from a request for proposal must be authorized by the Conservation Authority Board by way of an approved resolution.

Exemptions

The purchasing methods described in this policy do not apply to the following Goods and Services, some of which are regulated by other policies or Board decisions:

Employer's General Expenses including:

1. Statutory Remittances
2. Licenses, certificates & other approvals required (Vehicles, etc.)
3. Debt Payments
4. Grants to Others
5. Damage Claims
6. Investments

Utilities/Communication

Miscellaneous

1. Refunds and Overpayments
2. Fees or Levies of other Boards and Agencies
3. Real property purchases

Credit Cards



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The General Manager/Secretary-Treasurer is responsible in the allocation of Credit Cards to SSMRCA staff. The Credit Card Policy shall adhere to this Purchasing Policy

Non-Competitive Method

The Non-Competitive Method refers to the negotiation of an agreement for the purchase of Goods, Services and Construction from a Supplier where there is no open competition. This may be defined as the use of a Sole Source or Single Source as appropriate.

Non-competitive purchasing must be authorized by:

1. The General Manager for Purchases under \$3,000.00
2. The Board of Directors for Purchases greater than \$3,000.00;

Authorization of the use of the Non-Competitive Method may be considered upon receipt of written details and reasons by the requesting party; where one or more of the following factors are present:

1. the standardization or compatibility of a Purchase with existing equipment, product standards, facilities or service is a paramount consideration;
2. a Good or Service is purchased for testing or trial use;
3. there is an absence of competition for technical reasons and the Goods, Services and/or Construction can only be supplied by a particular Supplier;
4. the SSMRCA has a rental contract with a purchase option and such purchase option is beneficial to the SSMRCA;
5. no bids were received in response to a Bid Solicitation or Quotation Procedure; or,
6. a business case can be made to establish that the purchase is in the best interests of the SSMRCA.

Accessibility Criteria



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In accordance with the Province of Ontario Statutes and Regulations, the SSMRCA shall incorporate accessibility criteria and features in its procurement practices so that goods, services, and facilities are accessible to people with disabilities, unless it is not practicable to do so. If the General Manager determines that it is not practicable to incorporate accessibility criteria and features when procuring goods and services, the General Manager shall provide, upon request, an explanation.



Section	FINANCIAL
Title	Travel and Expenses Policy
Resolution #	Resolution #108/17
Approval Date	September 19, 2017
Revisions	April 21, 2020

Travel and Expenses Policy

This policy is intended to establish clear and equitable guidelines relating to business travel and reimbursement of acceptable business expenses.

The purpose of this policy is to ensure that expenses incurred by Sault Ste. Marie Region Conservation Authority (SSMRCA) staff and board members are necessary, reasonable and provide best value for SSMRCA.

SSMRCA recognizes that staff are often required to travel while on duty and at times outside of regular working hours and compensates for expenses incurred as set out below.

Policy Provisions

1. An employee, when authorized to travel by the General Manager to attend conferences, meetings, courses of instruction, or trips of a similar nature, shall be entitled to reimbursement for expenses as follows:
 - a. Reasonable out-of-pocket expenses for overnight accommodations, meals, and gratuities incurred;
 - b. Mileage reimbursed as set out in the **Travel** and the **Mileage** sections;
 - c. Other transportation costs and telephone expenses as may be incurred on SSMRCA business;
 - d. Registration or other applicable fees;
 - e. Parking charges and highway tolls;
 - f. Incidental expenses not covered above.
2. Employees may be entitled to reimbursement for expenses, as identified in item 1. above, for attendance at special events, as determined by the budget for the event and with the prior approval of the General Manager.
3. Meals will be paid by SSMRCA when original receipts for same are provided by employees under the following circumstances:
 - a. Attending meetings and conferences under appropriate authorization;
 - b. With prior approval by General Manager, arranged entertainment of SSMRCA guests on official business;
 - c. Under other special circumstances with the prior approval of the General Manager;

All meal receipts must identify the purpose and the guests in attendance for audit purposes.



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4. Expense claims must be supported by actual receipts for registration fees, accommodations, and other expenses when applicable.
5. Employees will not be entitled to reimbursement for the purchase of alcohol.
6. Mileage to and from home and the place of work will be paid for call-back overtime and for scheduled weekend work.
7. Receipts and mileage claims must be submitted to the General Manager, using the **Statement of Travelling Expenses or Disbursements** at the end of each month.

Use of Approved Forms

All expenditures will be itemized and detailed on the current, approved SSMRCA form: **Statement of Travelling Expenses or Disbursements** (attached).

Sufficient information shall be provided to demonstrate that the expense was business related and necessary.

The form shall be co-signed by the individual incurring the expense and the General Manager.

Submitting Expenses & Receipts

Expenses will be reimbursed based on the submission of a written **Statement of Travelling Expenses or Disbursements** form, submitted at the end of each month.

It should include:

1. The individual's name;
2. The date, origin, and purpose of each expense. If travel-related, destination and purpose of the trip;
3. Sufficient information must be provided to demonstrate that the expense was business related and necessary; and
4. An itemized and numbered list of all expenses for which reimbursement is requested. This should include; date/place of expense, description, purpose of expense and vendor receipts. Vendor receipts should include the vendor's name, a description of the services provided, a breakdown of taxes, and the total expenses, including gratuities.
5. When attending a conference / workshop event, an itinerary of the event be included with the claim form.



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Travel

Generally, the mode of transportation which offers the best reasonable value to SSMRCA having considered the safety and convenience of the traveler should be considered. Employees may use personal vehicles for business related travel in accordance with the SSMRCA **Mileage** section provided that the use of the personal vehicle does not increase the cost to SSMRCA. Use of personal vehicles for SSMRCA business is not covered under SSMRCA vehicle insurance.

Reimbursement for the use of personal vehicles is \$0.50/km. This rate will be reviewed by the SSMRCA Board of Directors annually.

If ground transportation is required for driving distances **greater than 300 kms**, rental cars must be used. Insurance for a rented vehicle is covered under SSMRCA's policy and does **not** require additional insurance from the rental firm.

Expenses that have been incurred but not pre-approved or that are deemed unreasonable or inappropriate will be questioned by the General Manager and may be denied or reduced.

Mileage

1. Whenever possible, SSMRCA owned vehicles shall be used to transport personnel and goods of SSMRCA. Every effort should be made to ensure minimal use of privately owned vehicles and that long distances are avoided.
2. Privately owned vehicles may be used with the prior approval of the General Manager or, during an emergency, without prior approval. Re-assignment of vehicles may be necessary.
3. Only mileage actually incurred on SSMRCA business shall be eligible for mileage allowance.
4. The amount of mileage shall be approved by the General Manager and shall be computed from the base of operations to the destined location, and return. The base of operations shall be determined by the General Manager. If more than one location is visited during a trip, then the total KM of the roundtrip, including return shall be calculated. The most direct, safest route should be determined prior to commencing the travel, taking into account multiple stops when appropriate. Normal daily commuting mileage between home and work is to be deducted from the requested mileage reimbursement. Mileage will be paid to staff at the approved



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rate for the SSMRCA as outlined in the **Travel** section and established by the Board of Directors.

5. An employee using their personal vehicle for SSMRCA business shall carry adequate insurance as stipulated by Provincial requirements.
6. SSMRCA will assume no financial responsibility for the use of an employee's own vehicle other than paying the kilometric rate.
7. All claims must be made on the **Statement of Travelling Expenses or Disbursements** form and must be countersigned by the General Manager. Forms are to be submitted within 30 days of the travel taking place. Forms that are submitted for mileage after the 30 days will be solely at the discretion of the General Manager as to whether the mileage will be reimbursed and may be denied or reduced.

Accommodation

Accommodation should be appropriate for the length of stay and business need. The standard of accommodation must also be sustainable under public scrutiny.

Accommodation should be positioned in close proximity to the travel destination at which the meeting, conference or professional development is occurring.

Accommodations should be selected based on the best reasonable value for SSMRCA and not the individual traveler's reward program. Every effort should be made to take advantage of government or web based preferred pricing.

Meals

The SSMRCA provides a maximum per meal allowance as listed below:

Maximum Per Diem Meal Allowance

Breakfast	\$15.00
Lunch	\$20.00
Dinner	\$30.00
Incidentals	<u>\$ 5.00</u>
TOTAL	\$70.00



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Detailed receipts, that breakdown purchases, are required for reimbursement. Rates will be reviewed at least once every four years.

Meal expenses cannot be claimed if meals are prepaid through an accommodation package or included as part of the conference or professional development seminar.

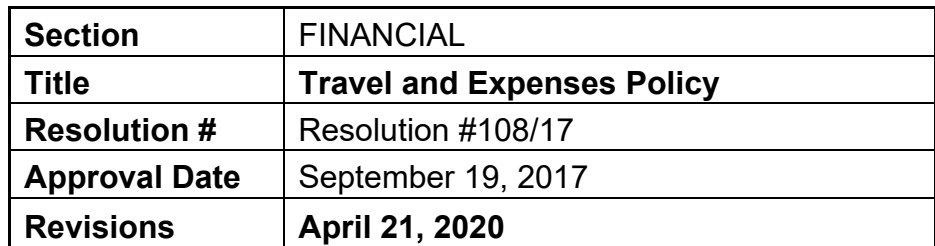
The cost of any alcoholic beverages is to be deducted from bills when claiming expenses. **Under no circumstances** will alcoholic beverages be paid for by the SSMRCA.

Additional Expenses

Normal and reasonable incidental fees for business-related travel such as gratuities, parking and taxi service for business related expenses only will be reimbursed with a valid receipt.

Extraordinary expenses such as mini bars and room movie rentals will be the responsibility of the traveler and not reimbursed by the SSMRCA.

When staff are approved to attend community events, where the event has the potential to impact the SSMRCA's business image and require paid admission, staff will be reimbursed for their admission at the discretion of the General Manager. Receipts will be required with any charitable tax receipt to be submitted to the SSMRCA.

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