

International Development Research Centre

Corporate Policy

Conferences and Events

1. Context
2. Objective
3. Application
4. Definitions
5. Roles and Responsibilities
 - 5.1 Employees
 - 5.2 Event Convenor
 - 5.3 The Finance and Administration Division
 - 5.4 Management Executive Committee
6. Authorizations
 - 6.1 Expenditure Initiation
 - 6.2 Contracting Authority
 - 6.3 Exceptions
7. Types of Events and Requirements
 - 7.1 Staff Events
 - 7.1(a) Food and Beverages Served During Staff Events
 - 7.2 Board of Governors Events
8. Conferences

1. Context

Parliament, funding partners and Canadians expect IDRC to well manage the funds it is entrusted and to make effective, efficient and economical use of its resources.

The number of employees attending a conference or event must be the minimum necessary to achieve the corporate, branch or divisional objective.

Both the employee planning to attend a conference or event and the supervisor authorizing his or her participation must consider the availability and appropriateness of virtual presence or other remote meeting solutions to minimize costs.

2. Objective

The objective of this policy is to provide guidance to IDRC employees planning, organizing, authorizing and attending conferences and events while ensuring effective and efficient use of IDRC resources.

3. Application

The provisions of this policy govern conferences and events attended by IDRC employees. They also apply to Board of Governors meetings and events where so indicated.

The provisions of this policy do not apply to the following specific circumstances:

- Employee participation in conferences and events that have no cost to IDRC;
- Hospitality as defined in the [Corporate Hospitality Policy](#);

Corporate Policy

Conferences and Events

- Training events that relate to ensuring that employees are qualified to perform their assigned duties – for instance, acquiring or maintaining professional accreditations of recognized professional bodies as required by the employees to practice their profession; and membership to such professional bodies;
- Meetings whose sole purpose is the direct delivery of the core mandate of IDRC such as visits to research project locations, research-related workshops, seminars, meetings and similar activities organized by recipients as part of their research activities;
- Employee appreciation events, except for the aspects that may be specifically mentioned in this policy.

4. Definitions

Conference – refers to a congress, convention, seminar, symposium or other formal gathering, which is not organized by IDRC and where persons participating debate or are informed of the status of a discipline that supports or relates to the business of IDRC. Multiple IDRC employees attending the same conference must treat the registration fee as an *events* expense.

Event – represents activities related to the governance and management of IDRC operations and may include both employees and non-employees. Such events include business meetings; corporate, branch or divisional management meetings; employee retreats; work planning meetings; employee debriefs; conferences organized by third parties attended by two employees or more and any other formal gathering of IDRC employees. See section 3 for exclusions to the definition of *events*.

Total cost of an event – for approval purposes, the total cost of a single event is calculated by adding all costs for items such as conference registration fees (for instance, when multiple IDRC employees attend the same conference and the registration fee is treated as an *events* expense); travel-related accommodation, transportation and taxes; professional service charges (paid to trainers, facilitators, interpreters, etc.); official Centre hospitality, and related service charges and any other relevant cost directly attributable to the particular event (for instance, purchase of material).

5. Roles and Responsibilities

All individuals involved in planning, organizing, authorizing and attending the conference or event are responsible for demonstrating the highest standards of ethical conduct as outlined in the [IDRC Code of Conduct](#). IDRC employees are expected to perform their official duties such that public confidence and trust in the integrity of the organization are maintained and enhanced.

5.1 Employees

Employees must follow the provisions of this policy and comply with the associated administrative procedures to ensure value for money.

5.2 Event Convenor

The Convenor is the person who initiates an event and takes responsibility for its conduct and outcome. The Convenor is responsible for:

- Clearly articulating the business needs of the event;
- Conceiving and planning the event in accordance with this policy;

Corporate Policy

Conferences and Events

- Using IDRC resources for convening an event wisely and with utmost prudence;
- Seeing that proper authority is exercised prior to the engagement of any expense by the person holding the Contracting Authority;
- Providing detailed requirements, information and scope of the event to the person holding the Contracting Authority;
- Determining and planning with prudence the maximum number of IDRC employees required to attend an event;
- Coordinating, staging and running of the event.

5.3 The Finance and Administration Division

The Finance and Administration Division is responsible for the following stewardship functions:

- Provision of tools and procedures to meet the policy requirements;
- Maintaining distinct general ledger accounts to record conference registration fees and event costs;
- Monitoring of transactions to ensure they are substantiated properly;
- Interpretation of the policy and procedures;
- Collection and posting of the cost information on the IDRC corporate web site.

5.4 Management Executive Committee

The Management Executive Committee is responsible for approving this policy.

6. Authorizations

Approval authorities are set out in the IDRC General Authority Matrix.

6.1 Expenditure Initiation

The approval of employee participation in **conferences** organized by third parties is assigned to cost centre managers and is limited to the amounts set out in the divisional budgets.

The approval of **events** is assigned to senior managers as follows:

- Director (or above) approval is required when the total cost of the event is 25,000 CAD or less;
- President approval is required when the total cost of the event exceeds 25,000 CAD.

6.2 Contracting Authority

Employees authorized to attend a conference must pay the registration fees with their travel cards.

Contracting authority for event-related goods and services remains with the Finance and Administration Division and can be delegated on a case-by-case basis.

Corporate Policy

Conferences and Events

6.3 Exceptions

Only the President and all the Vice-Presidents are allowed to authorize exceptions to this policy, to the extent that its context (see section 1) and spirit are respected.

7. Types of Events and Requirements

7.1 Staff Events

Staff events (including retreats) are organized on office premises and the cost of such activities should not exceed the amount prescribed for that purpose in the budgets of each cost centre. At locations where in-house meeting space is not sufficient, staff events are organized in a nearby modest commercial facility. Overnight stays related to staff events are strictly forbidden.

The cost of trainers or facilitators hired to guide discussions or impart training during staff events are to be charged to the *Learning and Professional Development* account identified by the Finance and Administration Division; however such costs are to be considered part of the *total cost of an event* for approval purposes (refer to section 4 above for more details).

7.1(a) Food and Beverages Served During Staff Events

As a rule, staff events should not include the provision of food and beverages.

For daylong events (staff meetings or retreats), where the provision of lunch cannot be avoided, the cost of such lunches per person must not exceed 1.75 times the lunch allowance and should be coded as *hospitality*. All other provision of food and beverages (coffee, tea, snacks, etc.) shall also be considered a hospitality cost and be coded to the *hospitality* account. Refer to the [Corporate Hospitality Policy](#) for details.

Similarly, the provision of snacks and beverages during breaks of long events (more than three hours) that fall under the scope of this policy must also be treated and accounted for under the [Corporate Hospitality Policy](#).

7.2 Board of Governors Events

The cost of Board of Governors events includes all reasonable and actual costs that contribute to a successful event. The travel portion of these events (transportation, accommodation, etc.) fall under the [Governor Travel Policy](#) and is coded as *travel*. All meals served to governors either fall in the Governor's Travel policy or as indicated in the paragraph below.

Meals served to Governors as a group, held in connection with Board or committee activities, must not cost more than 2.625 times the applicable meal allowance per person in attendance (i.e. including all Board guests). The Chair of the Board must authorize any exception to this rule. Those meals are not recorded as Official Centre Hospitality but rather as *event* costs.

8. Conferences

Registration fees to attend conferences, as defined in section 4 above, are to be charged to the *conference registration* account set up by the Finance and Administration Division.

Corporate Policy

Conferences and Events

Travel to and from the conference location is to be treated as a *travel* expense and coded accordingly.