

# FMI Alcohol Policy

## 1. Introduction

The Financial Management Institute of Canada (the "Corporation") believes that providing food and drink to staff, volunteers and business partners can contribute to a collaborative environment.

## 2. Policy Statement

The Corporation recognizes that alcohol, when served in a safe, responsible and legal manner, can have a place at some Corporation-sponsored events. The purpose of this policy is to establish a set of guidelines surrounding the expensing of alcohol-related costs at Corporation events. The policy also outlines expectations of acceptable conduct for Corporation functions where alcohol is served, keeping in mind that the Corporation is committed to promoting safety at all times.

This policy applies to all staff and volunteers of the Corporation, in all locations, while attending Corporation-sponsored events, or while acting on behalf of the Corporation. Staff are defined as all employees and contractors of the Corporation. Volunteers are defined as all elected Board Members and other persons who freely undertake tasks for the Corporation on an ad hoc basis.

All established Corporation policies apply at all the Corporation-sponsored events. Staff and volunteers are therefore expected to govern their conduct accordingly and to act in a responsible and professional manner at all times.

## 3. Alcohol-related expenses incurred during business-related meals

Generally, expenses related to alcoholic beverages incurred by staff and volunteers of the Corporation will not be charged to Corporation-issued credit cards or reimbursed, unless it is part of "hospitality", as described below.

Hospitality is the provision of food and beverages, at the Corporation's expense, to persons who are not engaged in work for the Corporation and/or who are actual or prospective volunteers, patrons, clients, staff or sponsors.

If a staff wishes to expense alcohol as a meal or entertainment expense on the Corporation issued credit card, or be reimbursed for such, pre-approval must be obtained from the Chief Executive Officer. In accordance with the Corporation's established practices, all alcohol-related expenses incurred by Board members must receive pre-approval from the President, or his/her delegate.

It is expected that hospitality will be extended in an economical and appropriate way when it facilitates Corporation business.

#### **4. Corporation-sponsored functions/events**

Alcohol may be served at some Corporation functions/events. Organizers of these events will adhere strictly to the terms of the relevant alcohol licence.

The Corporation has established a set of core expectations regarding the safe and responsible consumption of alcoholic beverages during these events. These core expectations are:

- You have an obligation to monitor and limit your own consumption of alcohol;
- You are expected to drink responsibly while at Corporation functions/events and at any time when you are representing the Corporation outside of work;
- You are expected to behave in accordance with usual business standards;
- You must not perform your work if your performance or judgment could be impaired by the consumption of alcoholic beverages;
- You must comply with and obey all laws.

At all Corporation events at which alcoholic beverages are served, the most senior staff or Board member attending the event must implement appropriate measures to ensure the health and safety of staff and volunteers. This may include designating one person not to consume alcohol at the function and to act as the function's safety coordinator. This role may be held by hospitality service staff at the event.

At all Corporation events at which alcoholic beverages are served, the Corporation will provide transportation to staff or volunteers (or reimburse them for transport-related costs) from the event to their place of residence, if no other means are available to ensure their safety and well-being.

#### **5. Consequences of breaches to this policy**

Staff and volunteers are encouraged to raise concerns or potential breaches of this Policy with the Chief Executive Officer or the President.

A breach of any of the provisions of this Policy may constitute a disciplinary offence which could lead to termination of employment, for employees and staff of the Corporation. Breaches by volunteers could lead to the suspension or termination of any relevant contract or relationship.