

Example of Clear and Effective Communication

Genre	Fact sheet
Target audience	All employees
Overall challenge	Ensure employees understand what to do and the order in which to do it. Indicate the correct form to use. Identify the related policy.

Value added from applying principles of Clear and Effective Communication (9. Accessible not addressed here)

Overall → ↓ \$\$ (↓ word count so ↓time)	↑ Efficiency (easier to review, edit, translate, update)	↑ Usability (easier to read <i>and</i> use info)
1. Concise ✓ Removed unnecessary verbiage. 2. Chunked ✓ Grouped SIMILAR types of info. 3. Scannable ✓ Added better labels and headings. ✓ Created standardized formats for this series. 4. Accurate ✓ Gave correct names of policy, form.	5. Complete ✓ Added learning resource. 6. Relevant ✓ Reworded and regrouped to show relevance of content. 7. Coherent ✓ Made it easy to distinguish between background and mandator steps. 8. Inclusive ✓ Ensured bias-free language.	

Before	After
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How to Obtain Pre-Approval for Hospitality, Events and Conferences

ISSUE DATE: 06/April/2018

As per the Treasury Board Secretariat of Canada directives, ██████ must ensure that all hospitality costs are pre-approved.

Steps for obtaining pre-approval for hospitality, events and conferences

Step 1 – Consult the [Hospitality, Conference and Event Policy](#) located on ██████ to ensure the following:

- You can extend hospitality for the intended purposes.
- You can attend an event organized by a 3rd party.
- You can organize an event on behalf of ██████.

Step 2 – Before securing any contracts with supplies/vendors, you will have to complete the [pre-approval form](#) (available on ██████). You will need to have the form signed by the appropriate level of authority.

Examples of details required for the pre-approval:

- Conference Fee
- Facilities/Venue Rental
- Production, Marketing, Promotion
- Audio, Visual, Video
- Professional Services
- Speaker/Presenter
- Translation
- Employee & Non-employee Travel Estimates
- Hospitality cost
- Total number of attendees

Note* More details on authority levels are outlined in the Hospitality, Conference and Event Policy.

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Where to get cost estimates to complete the pre- approval form?

- Consult details on previous events of same size and scope.
- Discuss the budget with your manager or the budget holder.
- Contact ██████ in Finance for any assistance.

How and when are you required to provide a copy of the signed pre-approval?

You must submit the completed and signed pre-approval with any payment requisition related to your hospitality, conference or event. Therefore when an event involved three different vendors who require three different invoices to be paid, you will need to attach a copy of the signed pre-approval with each invoice.

***For any questions pertaining to hospitality, conferences and events please email ██████ in Finance.**

All on 1 page

HOSPITALITY, EVENTS AND CONFERENCES

How to Obtain Pre-Approval

Issue date August 1, 2018

TBT goal **Simplify & Streamline**—Centralize data, reduce manual effort, and standardize processes to improve productivity and enable robust decision making.

Policy ██████ [Hospitality, Conference and Event Expenditures policy](#) (August 2016)

Form [Hospitality, Conference & Event Pre-Approval Form](#)
 ██████: Finance → [Forms](#)
 Use for anytime where ██████ is funding employees or non-employees to attend an event, regardless of which ██████ budget is used (operating or other).

Steps

- Verify that the item is eligible (intended purpose, your attendance and costs).**
 Consult section 4 of the [Hospitality, Conference and Event Expenditures policy](#).
- Gather cost estimates and complete the form.**
 - Review the form mentioned above.
 - Get help with estimates to complete the form:
 - Ask a colleague about previous events of same size and scope.
 - Discuss the budget with your manager or the budget holder.
 - The event organizer must submit a form for approval of the overall event. Include all costs, including travel.
 - Individual event attendees must also get approval for their travel.
 - To complete the form on behalf of someone else, change the name of the traveller in the Prepared by section.
- Obtain approval.**
 - Have the completed form above signed by the appropriate level of authority.
 - For details on how to determine the appropriate level of authority, refer to the [Hospitality, Conference and Event Expenditures policy](#) (multiple sections).
- Secure contracts with suppliers/vendors.**

Learning [Hospitality, Conference and Event Expenditure Policy – June 2016—Information session webinar](#)

Need more information? Contact ██████ in Finance.