Downtown Orillia
Business Improvement Area (DOBIA)

Standalone Policies Manual

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A. Governance Policies

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DOBIA ELECTION POLICY

Authority	Governance Manual; applicable legislation and City of Orillia requirements
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Municipal election cycle / as required

1. Purpose

The Downtown Orillia Business Improvement Area (DOBIA) election policy is to ensure transparency, fairness and accuracy in all Downtown Orillia Business Improvement Area (DOBIA) Board of Management elections.

The elections shall be organized and conducted by the Executive Director, who may delegate election-related duties to other full-time staff as required. The election process shall follow the schedule established in Section 2.

2. Election Schedule

Notice of Election: One week in advance of the opening of Nominations.
Nominations Open: Four weeks before the date of the election.
Nominations Close: Two weeks before the date of the election.
Voting Day: Taking place on the same day as the Annual General Meeting (typically the third week of October).

3. Notice of Election

Notice of the election shall include the number of positions available, term length, eligibility requirements and key election dates. Notice shall be published by the second Monday in September of a municipal election year. This notice shall be distributed in the form a press release including:

a) local print and/or digital media,
b) DOBIA member newsletter,
c) DOBIA social media accounts,
d) DOBIA website.
e) Notice should also be sent to City Clerk to be posted on the City of Orillia website.

Creating shareable digital posters that provide information to members about various aspects of the election process are also strongly advised. Asking DOBIA members and partners to share election information is also recommended.

4. Nominations

All nominations shall include a completed Nomination Consent Form and must be received by email before the nomination deadline. Each nomination shall include one (1) document demonstrating eligibility. Acceptable proof of eligibility may include:

a) Ontario Driver's Licence,
b) Ontario Health Card (photo), or Ontario Photo Card;
c) Lease, rental agreement, or mortgage statement for property within the BIA;

d) Government-issued documentation, such as incorporation documents, HST documentation or a property tax assessment; or

Following the close of nominations, the Executive Director shall verify the eligibility of each candidate. Verified nominees will be published on social media, newsletter and on the website.

Uncontested Elections: If the number of candidates nominated is equal to or less than the number of available Board positions, no vote shall be held. The names of the candidates shall be forwarded to the City Clerk for the applicable appointment process, and any remaining vacancies shall be filled in accordance with applicable policies.

5. Voters' List and Voting Eligibility

Voting Eligibility: Each member of the BIA is entitled to one vote, regardless of the number of properties owned or leased. For corporations or businesses, one voting representative shall be designated in writing and filed with the Executive Director.

Voters' List: The Voters' List is provided by the Treasurer of the City of Orillia and includes the names and addresses of business properties within the DOBIA and the names of tenants with information provided to the City Clerk.

Changes to the Voters' List may be made from the close of nominations until the close of voting. Additions or amendments shall be made in person. The individual requesting the change shall complete the required declaration form and provide appropriate proof of qualification and identification.

6. Ballots

Ballots shall list candidates alphabetically by surname. One ballot shall be issued to each eligible member. Ballots and voting instructions for mail-in and in-person voting shall be distributed to members on the Voters' List within ten (10) days after nominations close. Replacement ballots may only be issued in person on Voting Day.

7. Voting Process

Voting instructions and candidate information shall be posted on the DOBIA website and included in the member newsletter. Votes may be submitted by mail or in person at the DOBIA office. Mail-in ballots must be received by 6:00 p.m. on Voting Day.

8. Counting of Ballots

Ballots shall be counted immediately after voting closes. The count shall be conducted by two (2) DOBIA staff members and the City Clerk or designate. Candidates may observe the count.

If a tie occurs, the City Clerk or designate shall determine the winner by random draw. The secrecy of the vote shall be maintained throughout the voting and counting process.

9. Election Results
Unofficial election results shall be published in the newsletter and posted at the DOBIA office and website for ten (10) days. Any challenge to the results shall be submitted in writing within that ten-day period and communicated to the City Clerk. Final appointment of Board members is made by City Council.

Following Council approval, the Executive Director shall publish the names of elected members, their business names and qualifying addresses in the DOBIA newsletter, website and sent to the clerk for publishing on the City of Orillia website.

10. Election Records
All ballots and election records shall be securely stored for one hundred and twenty (120) days. If no challenges are received, election records shall be destroyed in the presence of a City Clerk's representative.

DOBIA BOARD ATTENDANCE POLICY

Authority	Governance Manual; applicable legislation and municipal requirements
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or as required

1. Purpose

Regular attendance is an important responsibility of Directors and supports effective governance of the Downtown Orillia Business Improvement Area (DOBIA). Directors are expected to attend all regular Board meetings and any Special Board meetings that are called.

Directors are also expected to attend assigned committee meetings regularly, in accordance with the Governance Manual and their committee responsibilities.

2. Attendance Monitoring

Attendance at Board meetings shall be recorded in the meeting minutes and maintained as part of the Board's governance records.

Where a Director is absent for either fifty percent (50%) of Board meetings in a year or three (3) consecutive Board meetings, the Board shall review the Director's attendance.

3. Attendance Review

When the attendance threshold in Section 2 is reached, the Board shall notify the Director and request an explanation for the absences.

The Executive Committee shall consider the explanation provided by the Director and determine whether the reason for the absences is acceptable. If the Executive Committee does not accept the reason for the absences, they will recommend to the Board that the Director submit a letter of resignation.

4. Authority

Any action taken under this Policy shall be by resolution of the Board and shall be consistent with the Governance Manual, applicable legislation, and the appointment requirements of the City of Orillia.

5. Resignation and Vacancy

A resignation shall be submitted in writing in accordance with the Governance Manual. Any resulting vacancy shall be addressed in accordance with the Governance Manual, the Election Policy, and applicable municipal procedures.

DOBIA CONFLICT OF INTEREST POLICY

Authority	Municipal Conflict of Interest Act; applicable municipal requirements; Governance Manual
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or as required

1. Purpose

The purpose of this Policy is to establish clear expectations for identifying, disclosing, and managing actual, potential, and perceived conflicts of interest involving the Downtown Orillia Business Improvement Area (DOBIA).

Directors and other individuals participating in DOBIA business shall act in the best interests of DOBIA and shall not use their position for personal, financial, or business advantage.

2. Application

This Policy applies to Directors, Officers, committee members and any other individuals participating in DOBIA decision-making or procurement activities where a conflict of interest may arise. The requirements of applicable legislation prevail where they are more restrictive or otherwise differ from this Policy.

3. Conflict of Interest

A conflict of interest exists where an individual's private interests conflict, or could reasonably be perceived to conflict, with the individual's public, fiduciary or other duties to DOBIA. Private interests may include financial, business, employment, family, or other personal interests. A conflict shall be addressed where a reasonable person could question whether those interests may affect, or appear to affect, the impartial exercise of an individual's duties to DOBIA.

4. Disclosure

An individual who has an actual, potential or perceived conflict of interest shall promptly disclose the conflict before participating in any discussion, recommendation or decision concerning the matter.

The disclosure shall identify the matter giving rise to the conflict and, where appropriate, the general nature of the personal, financial, or business interest.

Any conflict of interest involving a procurement shall be disclosed before the procurement decision is made. Individuals participating in procurement shall comply with the requirements of the Financial Policies & Procedures Manual.

5. Management of a Conflict

An individual who has declared a conflict shall not participate in discussion or vote on the matter, in accordance with the Procedural By-law and applicable legislation.

Where required by applicable legislation or the circumstances of the conflict, the individual shall leave the meeting or portion of the meeting during which the matter is considered.

An individual with a conflict shall not attempt to influence the discussion, recommendation or decision concerning the matter before, during, or after the meeting.

6. Conflicts Involving a Director's or Related Business

Where a procurement or other Board decision involves a Director or volunteer's business, the employer of a Director or volunteer, or another business or organization in which the individual has a relevant private interest, the interest shall be disclosed before the decision is made. Examples of circumstances that may require disclosure include:

a) a Board decision that may provide a particular financial or business advantage to the Director or an associated person;
b) a Director participating in a grant, sponsorship or partnership decision involving an organization with which the Director is associated; or
c) a Director's spouse, family member, or associated person having a relevant financial or business interest in a matter;
d) a Director or the Director's employer bidding on or providing goods or services to DOBIA;
e) a Director owning or operating a downtown business that may benefit from or be affected by a Board decision;

The existence of a business relationship does not, by itself, determine whether a conflict exists. The circumstances of the matter shall be considered together with applicable legislation and this Policy.

7. Gifts, Benefits and Personal Advantage

Directors shall not accept gifts, hospitality, discounts, favours or other benefits that could reasonably be perceived as influencing, or attempting to influence, the impartial exercise of their duties. Nominal promotional items or customary hospitality of modest value may be accepted where doing so does not create an actual or perceived conflict of interest and is consistent with applicable law and Board policy.

Directors shall not use their position to obtain personal, financial, political or business advantage.

8. Records and Meeting Minutes

Declarations of interest and the general nature of the conflict shall be recorded in the minutes in accordance with the Procedural By-law. Conflict-of-interest records shall be retained in accordance with the Records Management Policy and applicable legislation.

9. Responsibilities

Directors and other participants:

a) Recognize and disclose conflicts promptly.

b) Refrain from participating in matters in which they have a declared conflict.
c) Protect the DOBIA's interests and avoid using their position for personal advantage.
d) Comply with applicable legislation, this Policy and related Board policies.

The Chair or Presiding Officer shall ensure that declared conflicts are addressed in accordance with the Procedural By-law and applicable legislation.

The Executive Director or designate shall support the administration and record-keeping requirements associated with this Policy and shall ensure procurement-related conflicts are addressed in accordance with the Financial Policies & Procedures Manual.

Failure to comply with this Policy may be addressed by the Board in accordance with applicable legislation, the Governance Manual, the Procedural By-law and other applicable Board policies.

DOBIA MEMBER CONDUCT, RESPECTFUL COMMUNICATION & COMPLAINTS POLICY

Authority	Governance Manual; applicable legislation; City of Orillia requirements; related DOBIA policies
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or as required

1. Purpose

The purpose of this policy is to establish clear expectations for respectful and professional conduct among Downtown Orillia Business Improvement Area (DOBIA) members and to provide a fair, consistent process for addressing conduct concerns and complaints.

DOBIA recognizes that members may disagree with Board decisions, policies, programs or actions. This policy is not intended to restrict legitimate criticism, disagreement or participation in Board processes. It establishes standards for how concerns are communicated and addressed.

2. Application

This policy applies to BIA members when interacting with DOBIA Directors, Officers, employees, volunteers, contractors, other members, elected officials or members of the public in connection with DOBIA business or activities.

Directors are additionally subject to the Director Code of Conduct in the Governance Manual. Employees and workplace-related conduct are additionally subject to the Workplace Anti-Harassment & Anti-Violence Policy and other applicable employment policies. Where another policy or applicable legislation establishes a specific process for a matter, that process shall apply.

3. Standards of Conduct

Members shall:

a) communicate with courtesy, professionalism and respect;
b) focus concerns on issues, decisions or actions rather than personal attacks;
c) allow others to express differing views without intimidation or personal criticism;
d) use appropriate channels to raise concerns or complaints;
e) provide information that is truthful and accurate to the best of their knowledge;
f) respect the confidentiality of matters that are properly confidential.

Members shall not engage in conduct that is abusive, threatening, intimidating, discriminatory, harassing, defamatory, malicious or otherwise intended to improperly disrupt DOBIA operations or the participation of others. Examples may include:

a) threatening or abusive language, gestures or behaviour;

b) repeated personal attacks, insults, humiliation or degrading comments;
c) harassing or threatening communications by email, telephone, text message, social media or other electronic means;
d) knowingly making false or misleading statements about an individual in a manner intended to cause harm;
e) unreasonable or repeated communications after a matter has been addressed, where the purpose is to harass or disrupt;
f) stalking, unwanted following or other conduct that creates a reasonable concern for personal safety; or
g) interfering with DOBIA staff, volunteers, contractors or members carrying out legitimate DOBIA activities.

Members are encouraged to raise concerns through the appropriate Board or staff channels. Disagreement with a Board decision, criticism of a policy or participation in public debate does not, by itself, constitute a violation of this Policy.

4. Complaints
Where appropriate and safe to do so, individuals are encouraged to raise concerns directly with the person involved or seek assistance from the Executive Director or Board Chair to resolve the matter informally.

A formal complaint should be submitted in writing and should include, where available:
a) the name and contact information of the complainant;
b) a description of the conduct or incident;
c) the date, time, and location of the incident;
d) the name of the person or persons involved;
e) the names of any witnesses; and
f) copies or descriptions of relevant documents, messages, photographs or other evidence.

Complaints should normally be submitted to the Executive Director. If the complaint concerns the Executive Director, it shall be submitted to the Board Chair. If the complaint concerns the Chair, it shall be submitted to the Vice-Chair or another Officer designated by the Board.

5. Complaint Review
The Executive Director, Chair, or designated Board representative shall conduct an initial assessment to determine the appropriate process, including whether the matter should be addressed under this Policy or another applicable policy. The complaint may be:
a) resolved informally;
b) referred to the Workplace Anti-Harassment & Anti-Violence Policy where the matter concerns workplace harassment or violence;

c) referred to the Governance Manual, Director Code of Conduct or applicable municipal process where the matter concerns a Director;
d) referred to another appropriate authority where required; or
e) investigated under this Policy.

The investigation shall be conducted fairly and impartially by the Executive Committee or, where appropriate to ensure impartiality, another person designated by the Board. No individual with a conflict of interest or other involvement that could affect impartiality shall participate in the investigation. The person making the complaint and the person whose conduct is the subject of the complaint shall be given a reasonable opportunity to provide relevant information.

Complaints shall be handled as confidentially as reasonably possible, subject to legal requirements, procedural fairness, the need to investigate and any applicable access-to-information or privacy legislation.

No person shall be penalized, threatened or subjected to retaliation for making a complaint in good faith or participating in an investigation.

6. Findings and Corrective Action

Following an investigation, the appropriate decision-maker shall determine whether the complaint is substantiated, unsubstantiated, or cannot be determined based on the available information. Where conduct is found to be inconsistent with this Policy, the Board may take reasonable and proportionate action within its authority. Depending on the circumstances, this may include:

a) a written direction or warning to stop the conduct;
b) mediation or facilitated resolution where appropriate;
c) reasonable conditions on participation in a specific DOBIA activity, program or event, where permitted;
d) referral to another authority or process;
e) a request that the individual refrain from direct contact with a particular employee, volunteer or representative except through a designated channel; or
f) any other lawful corrective measure within the Board's authority.

Nothing in this Policy authorizes the Board to remove a Director from office where removal is reserved to the City or another authority.

7. Serious or Immediate Concerns

Where conduct involves an immediate threat to safety, physical violence, stalking, criminal activity or another serious risk, DOBIA may contact the appropriate emergency or law-enforcement authority and may take immediate steps necessary to protect employees, Directors, volunteers, members and the public.

Workplace harassment, workplace sexual harassment and workplace violence shall be addressed in accordance with the Workplace Anti-Harassment & Anti-Violence Policy and applicable occupational health and safety requirements.

8. Responsibilities

Members shall:

a) Treat others respectfully and communicate professionally.
b) Raise concerns through appropriate channels.
c) Cooperate reasonably with complaint reviews and investigations.
d) Avoid retaliation against anyone who makes a good-faith complaint or participates in an investigation.

The Executive Director shall:

a) Receive and assess complaints within the scope of this Policy.
b) Ensure complaints are directed to the appropriate process.
c) Maintain appropriate records and confidentiality.
d) Escalate matters to the Board or appropriate authority when required.

The Board shall:

a) Ensure complaints involving the Board, Directors or serious conduct matters are addressed fairly and appropriately.
b) Determine corrective action within the Board's authority.
c) Ensure that no individual involved in a conflict or complaint decision improperly participates in the review.

9. Records

Complaint records shall be maintained securely and retained in accordance with the Records Management Policy, applicable legislation and any applicable retention requirements.

10. Related Documents and Authorities

Governance Manual – Director Code of Conduct
Procedural By-law
Conflict of Interest Policy
Workplace Anti-Harassment & Anti-Violence Policy
Records Management Policy
Applicable City of Orillia policies and procedures
Applicable federal and provincial legislation

DOBIA COMMITTEE TERMS OF REFERENCE

Authority	Governance Manual; Procedural By-law; applicable legislation and municipal requirements
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	At the beginning of each Board term and as required

1. Purpose

These Terms of Reference establish the common framework for committees of the Downtown Orillia Business Improvement Area (DOBIA). They define committee membership, authority, meetings, responsibilities, reporting and participation.

Committee-specific mandates are set out in Sections 13, 14 and 15. These Terms of Reference are to be read together with the Governance Manual and Procedural By-law.

2. Committee Authority

Committees are established by the Board to research, discuss issues, develop ideas and solutions, and make recommendations on matters within their assigned mandates.

Committees are accountable to the Board and may exercise only the authority delegated to them by the Board. Unless expressly authorized, a committee may not commit DOBIA financially or legally, enter into contracts, establish Board policy, or direct staff.

A committee recommendation does not become a decision of the Board until approved by Board resolution, unless the Board has expressly delegated decision-making authority to the committee.

3. Committee Membership

Individuals who wish to serve on a DOBIA committee must submit a request to join the committee. Committee membership is subject to approval by the Board or, where specifically delegated by the Board, by the committee. A request to join a committee does not create a right to sit on the Committee. The Board may consider the applicant's eligibility, experience, interests, availability and the needs of the committee.

Unless otherwise established by the Board or a committee-specific Terms of Reference, committees may include:

a) Directors of the DOBIA Board;
b) BIA members who own or operate a business or commercial property within the DOBIA boundary;
c) representatives of community partner organizations operating within the DOBIA boundary; and
d) Committee-specific Terms of Reference may establish a maximum number of committee members.

Committee members are volunteers and serve without remuneration. Committee members are expected to participate constructively, attend meetings regularly, respect confidentiality and comply with applicable DOBIA policies.

The Board may appoint, replace or remove committee members by resolution. Vacancies may be filled through the same application and approval process.

4. Attendance by Non-Members and Guests

DOBIA members who wish to attend a committee meeting as an observer shall register with DOBIA staff in advance of the meeting. Registration allows staff to manage meeting space, materials and participation. Registration as an observer does not make an individual a committee member, allow for voting or ability to make comments during the meeting.

Guests, City staff, community partners, subject-matter experts and other observers may be invited by the Chair where their participation would assist the committee. The Chair may establish reasonable limits on observer participation to maintain an orderly and productive meeting.

5. Committee Chair

The Chair of each committee must be a Director of the DOBIA Board unless otherwise approved by the Board. The Chair shall be selected by the committee at its first meeting of the Board term or following the resignation or replacement of the previous Chair. The Chair shall:

a) chair committee meetings and facilitate discussion;
b) work with DOBIA staff to establish meeting agendas;
c) ensure the committee remains within its mandate and delegated authority;
d) encourage participation and respectful discussion;
e) present committee recommendations and reports to the Board; and
f) perform other duties assigned by the Board.

If the Chair is absent, the Chair may designate another committee member to chair the meeting. If no designation has been made, the committee may select a Director present to chair the meeting.

6. Meetings

Each committee shall establish its regular meeting schedule. The schedule may be changed by the committee where appropriate. The Chair may call a special meeting when an urgent or time-sensitive matter requires committee consideration.

Meetings may be held in person, virtually or in a hybrid format, as arranged by DOBIA staff and the Chair.

DOBIA staff shall prepare the agenda with input from the Chair and circulate the agenda and available meeting materials to committee members in advance of the meeting.

Accurate minutes shall be maintained for committee meetings and shall identify significant discussions, recommendations, decisions and attendance within delegated authority and action items.

7. Quorum and Voting
Unless otherwise established in a committee-specific Terms of Reference, quorum is a simple majority of appointed committee members. Where a vote is required, a majority of committee members present and voting is required to approve a recommendation or decision.

A committee may discuss matters for information when quorum is not present, but may not make recommendations or decisions.

8. Conduct and Conflict of Interest
Committee members shall comply with the Conflict of Interest Policy, Member Conduct, Respectful Communication & Complaints Policy and other applicable DOBIA policies.

A committee member who has an actual, potential or perceived conflict of interest shall disclose the conflict and refrain from participating in the discussion of the matter in accordance with the Conflict of Interest Policy.

Committee members shall conduct themselves respectfully and professionally and shall not use committee participation to obtain improper personal, financial, or business advantage.

9. Staff Support
DOBIA staff may provide administrative and professional support to committees as assigned by the Executive Director. Staff support may include preparing agendas and materials, scheduling meetings, recording minutes, conducting research, coordinating communications and maintaining records.

Staff remain accountable to the Executive Director and shall not take direction from individual committee members except as authorized.

10. Reporting to the Board
Each committee shall report its activities and recommendations to the Board as required by its mandate. The Chair shall provide a written report for inclusion in the Board agenda package where required and shall present the report to the Board. Committee recommendations requiring Board action shall be clearly identified for Board consideration.

11. Committee Review
The Board shall review committee structure, membership, mandates and effectiveness at the beginning of each Board term and whenever circumstances require. The Board may amend, suspend or dissolve a committee by resolution.

12. Ad Hoc Committees and Working Groups

The Board may establish ad hoc committees, task forces or working groups for specific projects or issues.

The establishing resolution or Terms of Reference shall identify the mandate, membership, Chair, reporting requirements, authority and expected completion date, where appropriate.

An ad hoc committee or working group concludes when its mandate is completed or when the Board dissolves it.

13. Beautification, Maintenance & Streetscape Committee

The Beautification, Maintenance & Streetscape (BMS) Committee researches, discusses, develops ideas and solutions, and makes recommendations to the DOBIA Board regarding matters within its mandate.

Areas of Responsibility:

a) Projects that beautify and activate public spaces in Downtown Orillia.
b) Improvements to the maintenance of downtown public spaces.
c) Installation and removal of DOBIA on-street assets, including but not limited to banners, benches, bike racks, light-pole string lights and seasonal decorations.
d) Replacement, refurbishment and repair of existing DOBIA on-street assets.
e) Potential purchase of new DOBIA on-street assets.
f) Review of DOBIA vehicles and recommendations regarding repairs or replacement.
g) Receiving deputations from groups and individuals regarding beautification, maintenance and activation of the downtown.

The BMS Committee may include Directors, BIA members who own a business or commercial property within the DOBIA boundary, and representatives of community partner organizations operating within the boundary.

The committee may have up to seven appointed committee members.

The BMS Committee will normally meet monthly. The committee may adjust the frequency, date or time of meetings as required.

The Chair shall provide a written report including any recommendations to the Board based on committee activities and approved minutes or meeting notes.

14. Marketing, Programming & Sponsorship Committee

The Marketing, Programming & Sponsorship (MPS) Committee researches, discusses, develops ideas and solutions, and makes recommendations to the DOBIA Board regarding matters within its mandate.

Areas of Responsibility:

a) Effectively marketing Downtown Orillia and its programming.
b) External marketing products and services that may benefit the downtown area.
c) Supporting and improving downtown events and programming.
d) DOBIA programming calendar, including making recommendations to the Board regarding which programming to support with financial or other DOBIA resources.
e) Receiving deputations from groups and individuals regarding downtown programming or marketing tools and services.
f) Exploring sponsorship and grant opportunities that may benefit Downtown Orillia, DOBIA programming and provide resources to the DOBIA.

The MPS Committee may include Directors, BIA members who own a business or commercial property within the DOBIA boundary, and representatives of community partner organizations operating within the boundary.

The committee may have up to seven appointed committee members.

The MPS Committee will normally meet monthly. The committee may adjust the frequency, date or time of meetings as required.

The Chair shall provide a written report to the Board based on committee activities and approved minutes or meeting notes.

15. Executive Committee

The Executive Committee provides leadership and oversight between regular Board meetings where timely action is required. It operates within authority delegated by the Board and is accountable to the Board. The Executive Committee shall consist of the Chair, Vice-Chair, Treasurer and Secretary. Responsibilities include:

a) Consider urgent or time-sensitive matters that cannot reasonably wait until the next regular Board meeting.
b) Provide advice and recommendations to the Board on matters referred to the Committee.
c) Exercise authority specifically delegated to it by the Board.
d) Report decisions and activities to the Board at the next appropriate meeting.
e) Review all matters related to human resource management including hiring, performance management, performance reviews, discipline, compensation and make recommendations to the Board.

The Executive Committee may only exercise authority expressly delegated by the Board. It may not establish or amend Board policy, commit DOBIA financially or legally, or exercise authority reserved to the Board by legislation, by-law or Board policy.

The Executive Committee shall meet monthly between board meetings or as required and may meet in person, virtually or in a hybrid format. Meetings may be called by the Chair.

Quorum shall be a simple majority of appointed Executive Committee members. Decisions within delegated authority shall be made by a majority of members present and voting.

Members shall comply with the Conflict of Interest Policy, Member Conduct, Respectful Communication & Complaints Policy and all other applicable DOBIA policies.

The Chair shall report Executive Committee activities and recommendations to the Board. Decisions made under delegated authority shall be reported to the Board at the next appropriate meeting.

The Board shall review the Executive Committee's mandate and effectiveness at the beginning of each Board term and may amend or dissolve the Committee by resolution.

B. Human Resources & Workplace

Sick Leave & Medical Absence Policy
Health & Safety Policy
Flex Remote Work Policy
Workplace Anti-Violence & Anti-Harassment Policy
Accessibility Policy

DOBIA SICK LEAVE & MEDICAL ABSENCE POLICY

Authority	Board-approved employment policy; employment agreements; applicable legislation
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or sooner if legislation or employment practices change

1. Purpose

The purpose of this Policy is to establish clear and consistent requirements for sick leave, medical absences, absence reporting, accommodation and return to work for employees of the Downtown Orillia Business Improvement Area (DOBIA).

This Policy is intended to provide benefits greater than the minimum employment standards where expressly stated, while ensuring that statutory job-protected leaves and other legal requirements are respected.

2. Application

This Policy applies to all DOBIA employees, subject to the terms of the employee's employment agreement and any different statutory requirements that apply to a particular leave. Where an employment agreement provides a greater benefit or a different entitlement that is lawful, the employment agreement shall govern that entitlement.

This Policy does not replace statutory leaves under the Employment Standards Act, 2000 or other applicable legislation. Where legislation provides a greater right or protection, the legislation prevails.

3. Paid Sick Leave

Eligible full-time employees are entitled to twelve (12) paid sick days per calendar year, accruing at a rate of one (1) day for each completed month of employment. Employees hired during the calendar year will receive sick leave credits based on completed months of employment during that year.

Unused sick leave credits carry forward from year to year and may accumulate to a maximum sick leave bank of thirty (30) days. Once an employee's sick leave bank reaches thirty (30) days, no additional credits will accrue until the balance falls below thirty (30) days.

Paid sick leave may be used when an employee is unable to attend work because of their own illness, injury or medical emergency, or because their child, stepchild or foster child is ill, injured or experiencing a medical emergency and requires the employee's care or assistance. Sick leave credits have no cash value and will not be paid out upon termination of employment except where required by applicable law or an employment agreement.

4. Reporting an Absence
An employee who is unable to attend work because of illness or injury shall notify the Executive Director as soon as possible and, where practicable, before the employee's scheduled start time. The employee shall provide an expected duration of the absence where reasonably known and shall provide updates when the expected return date changes.

If the Executive Director is unable to work because of illness or injury, the Executive Director shall notify the Board Chair.

Where an absence is expected to continue beyond five consecutive working days, the employee shall maintain reasonable communication with the Executive Director or Board Chair, regarding expected duration of the absence and any return-to-work needs.

5. Evidence and Medical Information
DOBIA may request information or documentation that is reasonable in the circumstances and permitted by applicable law to administer a contractual sick leave benefit, medical accommodation, disability leave or return-to-work process.

DOBIA will not require an employee to provide a medical note from a qualified health practitioner as proof of entitlement to statutory sick leave where such a requirement is prohibited by law.

Where medical information is required for accommodation, disability management or return-to-work purposes, DOBIA will request only information reasonably necessary to understand the employee's functional limitations, restrictions, expected duration and accommodation needs. Employees are not required to disclose a diagnosis or other personal medical information that is not reasonably necessary for the purpose.

6. Family Responsibility Leave
Employees may be entitled to statutory family responsibility leave and other family-related leaves under applicable legislation. Paid sick leave may be used for an employee's child, stepchild or foster child as provided in Section 3. Sick leave credits may also be used for other family-related absences only where expressly permitted by an employment agreement or another Board-approved benefit.

Statutory family responsibility leave is separate from DOBIA's paid sick leave benefit, and the employee's statutory rights are not reduced by the use of any employer-provided paid leave.

7. Medical Leave and Disability
Where an employee is unable to perform their duties because of a medical condition that extends beyond available sick leave credits, DOBIA will work with the employee to determine the appropriate leave, accommodations and/or benefit arrangements.

Eligible employees may participate in any long-term disability or other benefit plan provided by DOBIA, subject to the terms and conditions of the applicable plan. Approval of a disability or medical leave does not guarantee entitlement to benefits where the applicable insurer or benefit plan has separate eligibility requirements.

8. Accommodation

DOBIA is committed to providing workplace accommodation to the point of undue hardship, as required by applicable legislation. Where accommodation is required, DOBIA and the employee shall:

a) identify the need for accommodation;
b) obtain information reasonably necessary to understand functional limitations and restrictions;
c) consider the essential duties and requirements of the position;
d) identify reasonable accommodation options;
e) document the accommodation arrangement where appropriate; and
f) review and update the accommodation as circumstances change.

Accommodation information shall be handled confidentially and shared only with individuals who require the information to fulfill their responsibilities.

9. Return to Work

DOBIA will support an employee's safe and sustainable return to work following a medical absence. Depending on the circumstances, an employee may return to their regular duties, return with temporary or permanent accommodation, or return through a transitional or modified work arrangement.

Where reasonably necessary for workplace safety, accommodation or return-to-work planning, DOBIA may request appropriate medical information regarding functional abilities and restrictions, subject to applicable law. The employee is expected to participate in the return-to-work process, provide relevant functional information and advise DOBIA of any change that may affect the return-to-work plan.

10. Workplace Injury or Illness

An employee who experiences an injury or illness arising from or during employment shall report the incident to the Executive Director as soon as possible and seek appropriate medical attention where required. DOBIA shall administer workplace injuries and illnesses in accordance with applicable occupational health and safety and workers' compensation requirements.

Where a workplace injury or illness requires accommodation or a return-to-work plan, DOBIA shall coordinate the process with the employee and any applicable insurer or regulatory authority.

11. Pregnancy and Parental Leave
Pregnancy and parental leave shall be provided in accordance with the Employment Standards Act, 2000 and other applicable legislation. Employees are responsible for providing notice required by legislation. DOBIA may request documentation only when permitted by law.

12. Confidentiality and Records
Medical and absence information shall be treated as confidential employee information. Access shall be limited to individuals who require the information to administer employment, payroll, benefits, accommodation, workplace safety or legal requirements.

Records relating to sick leave and medical absences shall be maintained securely and retained in accordance with DOBIA's Records Management Policy and applicable legislation. Payroll records shall reflect approved leave in accordance with the Financial Policies & Procedures Manual.

13. Responsibilities
Employees:

a) Report absences promptly and maintain reasonable communication during extended leave.
b) Use sick leave credits only for permitted purposes.
c) Participate in accommodation and return-to-work processes where applicable.
d) Provide information or documentation that is reasonably required and permitted by law.

Executive Director:

a) Administer sick leave and medical absences consistently with this Policy.
b) Maintain appropriate confidentiality and records.
c) Coordinate accommodation and return-to-work processes.
d) Ensure payroll treatment of approved leave is communicated to payroll provider.
e) Refer matters requiring Board authority to the Board Chair or Board as appropriate.

Board Chair:
The Board Chair shall perform the responsibilities assigned to the Chair under this Policy where the Executive Director is the employee taking leave or where the Executive Director is otherwise unable to administer the matter.

14. No Reprisal
No employee shall be disciplined, penalized or subjected to reprisal for exercising a statutory leave entitlement or requesting a workplace accommodation in good faith, subject to applicable legislation.

15. Policy Administration
The Executive Director is responsible for the day-to-day administration of this Policy, subject to Board authority and applicable law.

The Board may amend this Policy by resolution. The Policy shall be reviewed periodically to ensure continued alignment with employment legislation, benefit arrangements, and DOBIA's employment practices.

16. Related Documents and Authorities

Employment Standards Act, 2000
Occupational Health and Safety Act
Workplace Safety and Insurance Act, 1997
Human Rights Code
Financial Policies & Procedures Manual – Section 11, Payroll & Compensation
Records Management Policy
Workplace Anti-Harassment & Anti-Violence Policy
Applicable employment agreements and benefit plans

APPENDIX A: DOBIA RETURN TO WORK ASSESSMENT

For non-occupational return-to-work and accommodation purposes

This form is intended to provide DOBIA with information about an employee's functional abilities and restrictions so that appropriate return-to-work or workplace accommodation measures can be considered. Please do not provide a diagnosis or other medical information that is not necessary to describe the employee's functional abilities or limitations.

Return completed form using the confidential process designated by DOBIA. Medical and accommodation information shall be handled in accordance with DOBIA's privacy and records-management requirements.

Employee Name:	
Date:	
Position:	

Employee Authorization

I, _____, authorize the health care professional treating me to provide DOBIA with information about my functional abilities and limitations as they relate to remaining at work, returning to work, or being accommodated at work. This authorization is limited to information reasonably required for workplace accommodation and return-to-work planning.

_____

Employee Signature

Health Care Practitioner

Please indicate the employee's current ability to work. Please provide functional information and restrictions relevant to the employee's work. Additional comments may be attached if necessary.

☐ Return to regular work with no restrictions.

☐ Totally unable to work at this time. Reassessment date: _____

☐ Able to return to work with noted restrictions. Anticipated return-to-work date:_____

Functional Abilities

Walking	☐ Full ability ☐ Up to 100 m ☐ 100–200 m ☐ Other: _____	**Standing**	☐ Full ability ☐ Up to 15 min ☐ 15–30 min ☐ Other: _____
Sitting	☐ Full ability ☐ Up to 30 min ☐ 30 min–1 hr ☐ Other: _____	**Lifting floor to waist**	☐ Full ability ☐ Up to 5 kg ☐ 5–10 kg ☐ Other: _____

Lifting waist to shoulder	☐ Full ability ☐ Up to 5 kg ☐ 6–10 kg ☐ Other: _____	**Stair climbing**	☐ Full ability ☐ Up to 5 steps ☐ 5–10 steps ☐ Other: _____
Ladder climbing	☐ Full ability ☐ 1–3 steps ☐ 4–6 steps ☐ Other: _____	**Travel to work**	☐ Public transit ☐ Drive a car ☐ Other: _____ If applicable: ☐ Yes ☐ No

Restrictions / Limitations

Bending / twisting / repetitive movement	Work at or above shoulder level	Chemical exposure
Environmental exposure (e.g., heat, cold, noise, or scents)	Limited use of hands: ☐ Left ☐ Right ☐ Gripping ☐ Pinching ☐ Other	Pushing / pulling: ☐ Left arm ☐ Right arm ☐ Other
Operating motorized equipment	Potential work-related effects of treatment/medication	Exposure to vibration: ☐ Whole body ☐ Hand/arm
Cognitive abilities / limitations	Other restrictions or limitations	Additional details

Cognitive Abilities / Accommodation Needs

What functional accommodations, if any, are recommended to support a return to work? Please describe only work-related functional limitations and accommodation needs.

_____

_____

_____

Duration and Hours

Estimated duration of limitations	☐ 1–2 days ☐ 3–7 days ☐ 8–14 days ☐ 15–31 days ☐ Other:
Complete recovery expected	☐ Yes ☐ No ☐ Unknown at this time
Recommended hours	☐ Full-time ☐ Modified hours ☐ Graduated hours
Anticipated review / reassessment date	

Additional Comments on Abilities and/or Restrictions

Please provide objective functional information and further details to support the recommendations above:_____

_____

_____

Health Care Practitioner Name:	
Signature:	
Date / Telephone:	

APPENDIX B: DOBIA WORK ACCOMMODATION PLAN

For non-occupational return-to-work and accommodation purposes

The purpose of this plan is to identify temporary or ongoing workplace changes that support a safe and effective return to work based on the employee's documented functional abilities and restrictions.

1. Current Functional Restrictions
Based on the Worker Assessment, identify the work-related restrictions or limitations:

_____

_____

2. Temporary Modifications or Accommodations
Identify any changes required to allow the employee to safely perform their work. This may include modified duties, modified hours, changes to work methods, reduced physical demands, additional breaks, or other reasonable measures.

Accommodation / Modification	*Details*	*Expected Duration*
Modified duties		
Modified hours		
Modified work methods		
Additional breaks		
Other		

3. Return-to-Work Schedule

Period	*Hours / Schedule*	*Duties / Restrictions*
Initial period		
Second period		
Subsequent period		

4. Review
Next review date: _____
Person responsible for review: _____

Role	*Name / Signature*	*Date*	*Review Date*
Employee			
Executive Director/Chair			

Confidential — Accommodation information shall be retained securely and accessed only by persons who require it for authorized employment purposes.

APPENDIX C: DOBIA RETURN-TO-WORK PROGRESS REPORT

For non-occupational return-to-work and accommodation purposes

The purpose of this report is to provide the Executive Director / Supervisor with information regarding the employee's current functional abilities and to identify any issues that arise during the return-to-work plan. Do not include a diagnosis or unnecessary medical information.

Employee Name	
Position	
Report Frequency	☐ Bi-weekly ☐ Monthly ☐ Other:
Date of Report / Next Report Due	

Tasks I am Able to Complete

_____

Tasks That Are Still Challenging to Complete

_____

Progress Made Since the Last Report

_____

Is Any Action Required to Support Further Progress?

_____

Are There Any Concerns Regarding the Return-to-Work Plan?

_____

Employee Confirmation

I confirm that the information provided above accurately describes my current work abilities and any concerns I have regarding the return-to-work plan.

Employee Signature:	Date:
Additional sheet attached?	☐ Yes ☐ No

Executive Director / Supervisor Review

_____

_____

Executive Director/Chair:	Date:
Follow-up required:	☐ No ☐ Yes — Date: _____

Confidential — Retain in the appropriate confidential employee record in accordance with DOBIA's Records Management Policy.

DOBIA HEALTH & SAFETY POLICY

Authority	Occupational Health and Safety Act; applicable regulations; Board-approved policy
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or sooner if legislation, workplace conditions or organizational requirements change

1. Purpose

The Downtown Orillia Business Improvement Area (DOBIA) is committed to providing a safe and healthy workplace for employees and other persons engaged in DOBIA activities.

The purpose of this Policy is to establish a framework for preventing workplace injury and illness, identifying and addressing hazards, providing appropriate information and training, and supporting safe work practices in DOBIA offices, maintenance activities, events, vehicles and other work activities.

2. Scope

This Policy applies to DOBIA employees and, where relevant to their activities, volunteers, committee members, contractors and other persons acting on behalf of or participating in DOBIA activities.

It applies to work performed at the DOBIA office, outdoor and downtown work locations, events, work-related travel, vehicles, maintenance activities and authorized remote-work locations.

3. Health & Safety Commitment

DOBIA is committed to providing a safe and healthy workplace and will take reasonable measures to identify hazards, reduce risks, provide appropriate information and training, and comply with applicable health and safety requirements.

4. Responsibilities

Board

a) approve this Policy and significant amendments;
b) provide governance oversight of workplace health and safety;
c) support appropriate resources for health and safety; and
d) provide oversight of significant health and safety matters brought to the Board.

Executive Director

a) administer this Policy and establish appropriate workplace procedures;
b) provide workers with appropriate information, instruction and supervision;
c) ensure hazards and significant safety concerns are addressed;
d) coordinate incident reporting and corrective measures;

e) ensure required training and records are maintained; and
f) escalate significant health and safety matters to the Board or appropriate authority.

Employees and Other Workers

a) work safely and follow established health and safety procedures;
b) use required protective equipment and safety devices properly;
c) report hazards, injuries, illnesses, incidents and unsafe conditions promptly;
d) participate in required training and safety processes;
e) take reasonable care for their own health and safety and that of others affected by their work; and
f) cooperate with investigations and corrective measures.

5. Hazard Identification and Risk Control

DOBIA shall identify workplace hazards associated with its operations and implement reasonable controls appropriate to the level of risk. Hazard considerations may include:

a) slips, trips and falls;
b) manual handling, lifting and repetitive work;
c) use of tools, machinery, vehicles and equipment;
d) working near traffic or in public areas;
e) weather, heat, cold and other environmental conditions;
f) electrical, fire and other physical hazards;
g) chemical or other hazardous materials, where used;
h) ergonomic and office-work hazards;
i) working alone or in isolated locations; and
j) event-specific hazards.

Where a hazard cannot be reasonably eliminated, appropriate administrative controls, safe work procedures, equipment or personal protective equipment shall be used.

6. Working Alone

Where an employee is required to work alone or in an isolated location, DOBIA shall assess the associated risks and establish reasonable communication, check-in or emergency procedures appropriate to the work. Employees shall follow any applicable lone-worker procedures.

7. Safe Work Practices and Protective Equipment

Workers shall follow safe work procedures appropriate to their duties and shall use equipment only when they are trained or authorized to do so.

Where required by the work or applicable requirements, DOBIA shall provide or require appropriate personal protective equipment (PPE). PPE shall be used, maintained and stored in accordance with applicable instructions.

Workers shall not bypass, disable or misuse safety devices, guards or other protective measures.

8. Training and Information
DOBIA will provide health and safety information, instruction and training appropriate to the duties and hazards of workers. Training may include, as applicable:

a) workplace-specific hazards and safe work procedures;
b) emergency procedures;
c) use of tools, equipment and vehicles;
d) personal protective equipment;
e) first aid and incident reporting;
f) working near traffic or in public spaces;
g) ergonomic and safe office practices; and
h) other training required by legislation, insurers or the nature of the work.

Training records shall be maintained where required by law or DOBIA policy.

9. Workplace Violence and Harassment
Workplace violence and workplace harassment are governed by DOBIA's Workplace Anti-Violence & Anti-Harassment Policy. Where a matter also presents a general workplace health and safety issue, the applicable health and safety requirements shall also be followed.

10. Emergency Preparedness and Response
DOBIA shall maintain reasonable procedures for responding to workplace emergencies appropriate to its operations. Emergency planning may address:

a) fire and evacuation;
b) medical emergencies;
c) serious injury or illness;
d) vehicle or equipment incidents;
e) severe weather;
f) hazardous spills or releases, where applicable;
g) utility failures or other workplace emergencies; and
h) other foreseeable emergencies associated with DOBIA activities.

Emergency services shall be contacted whenever necessary. Workers shall not place themselves or others at unnecessary risk when responding to an emergency.

11. First Aid and Medical Assistance
DOBIA shall maintain first aid resources appropriate to its workplace and activities and shall meet applicable legal requirements. Workers shall know how to obtain first aid or emergency medical assistance when required.

In a medical emergency, 9-1-1 or other emergency medical assistance shall be contacted as appropriate.

12. Incident, Injury and Hazard Reporting
Workers shall report workplace injuries, illnesses, near misses, property damage, vehicle incidents and identified hazards as soon as reasonably possible. Reports should include enough information to allow DOBIA to assess the circumstances and take appropriate corrective action.

DOBIA may investigate incidents and near misses to identify contributing factors and prevent recurrence. Where legislation requires notification to a regulator, insurer, compensation authority or other body, DOBIA shall make the required notification.

13. Workplace Inspections and Corrective Action
DOBIA may conduct reasonable workplace inspections or reviews to identify hazards and confirm that controls are effective. Identified hazards shall be addressed according to their seriousness and urgency. Immediate hazards that could reasonably result in injury shall be addressed promptly, and work may be stopped or the area restricted where necessary to protect people.

14. Right to Refuse Unsafe Work
Workers have rights and responsibilities relating to unsafe work under applicable occupational health and safety legislation. An employee who believes that work may be unsafe shall immediately report the concern and follow the applicable process under occupational health and safety legislation.

Nothing in this Policy limits a worker's statutory right to refuse unsafe work or requires a worker to perform work they are not legally required to perform.

15. Workplace Accommodation
DOBIA will accommodate employees in accordance with applicable human rights and occupational health and safety requirements. Medical and accommodation information shall be handled confidentially in accordance with the Sick Leave & Medical Absence Policy and Records Management Policy.

16. Remote Work
Health and safety requirements continue to apply when employees work remotely under an approved Flex Remote Work arrangement. Employees shall follow the health and safety requirements of both policies.

17. Events, Public Spaces and Vehicles
Health and safety requirements for DOBIA events are addressed in the Event Planning & Management Policy and Event Planner. Vehicle safety requirements are addressed in the

Vehicle & Fleet Use Policy. Event-specific health and safety planning shall be conducted in accordance with the Event Planning & Management Policy and applicable event planning tools.

Where DOBIA activities occur in public spaces or on property controlled by another party, workers shall follow applicable site rules, municipal requirements and reasonable safety directions.

18. Health & Safety Records
DOBIA shall maintain health and safety records required by applicable law and Board policy, including records of required training, inspections, incidents and corrective actions where applicable. Health and safety records shall be retained in accordance with the Records Management Policy and applicable legal requirements.

19. Responsibilities for External Workers and Contractors
Contractors and other external persons performing work for DOBIA are responsible for complying with applicable health and safety requirements and their contractual obligations. DOBIA shall communicate relevant workplace hazards and site requirements to contractors where reasonably necessary and shall take reasonable steps to address unsafe conditions within its control. Contractors remain responsible for their workers, equipment, safe work practices and legal obligations, subject to the terms of their contract with DOBIA.

20. Non-Retaliation
No employee shall be disciplined, penalized or subjected to reprisal for reporting a good-faith safety concern, participating in a health and safety process, or exercising a statutory health and safety right, subject to applicable law.

21. Compliance
DOBIA shall comply with applicable occupational health and safety legislation and regulations, workers' compensation requirements and other applicable workplace safety requirements. Where applicable legislation establishes a higher or different requirement than this Policy, the legislation prevails.

22. Related Documents
Workplace Anti-Violence & Anti-Harassment Policy
Sick Leave & Medical Absence Policy
Flex Remote Work Policy
Vehicle & Fleet Use Policy
Event Planning & Management Policy
Accessibility Policy
Records Management Policy
Financial Policies & Manual
Employee & Human Resources Handbook

23. Administration and Review
The Executive Director is responsible for the day-to-day administration of this Policy within delegated authority.

The Board may amend this Policy by resolution.

This Policy shall be reviewed at least every four (4) years and sooner where required by legislation, significant workplace changes or the Board.

24. Applicable Legislation
Occupational Health and Safety Act, R.S.O. 1990, c. O.1
Workplace Safety and Insurance Act, 1997, S.O. 1997, c. 16
Ontario Human Rights Code, R.S.O. 1990, c. H.19
Applicable regulations and other workplace health and safety requirements

DOBIA FLEX REMOTE WORK POLICY

Authority	Executive Director
Approval	Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or sooner if operational needs, legislation or employment practices change

1. Purpose

The purpose of this Policy is to establish the framework for hybrid and ad hoc remote work arrangements for eligible employees of the Downtown Orillia Business Improvement Area (DOBIA). The Policy is intended to support operational effectiveness and employee flexibility while maintaining service delivery, accountability, collaboration and appropriate oversight.

2. Scope

This Policy applies to employees whose duties can reasonably be performed through hybrid or remote work and whose employment arrangement permits such work.

Remote work is not an automatic employee entitlement. Eligibility and participation are subject to the requirements of this Policy, the employee's position, operational needs and the employee's employment agreement.

Nothing in this Policy limits any workplace accommodation or other right provided by applicable legislation.

3. Definitions

Hybrid Work

A regular work arrangement in which an employee works both from the DOBIA office and remotely according to an approved schedule.

Ad Hoc Remote Work

Occasional remote work that is not part of an employee's regular hybrid schedule and requires approval in advance.

Remote Work

Work performed from an approved location other than the DOBIA office.

4. Hybrid Work

Eligible employees participating in a hybrid work arrangement shall work a minimum of two (2) days per week in the DOBIA office.

The specific office schedule shall be established in consultation with the employee and approved by the Executive Director, having regard to operational requirements, meetings, events, service needs and the employee's duties.

The Executive Director may adjust an employee's hybrid schedule when operational requirements require increased in-office attendance.

Hybrid work arrangements may be reviewed or changed when duties, performance, operational needs or organizational circumstances change.

5. Ad Hoc Remote Work
Ad hoc remote work may be approved by the Executive Director where circumstances make remote work practical and operationally appropriate. Where the Executive Director is requesting ad hoc remote work, approval shall be obtained from the Board Chair.

Ad hoc remote work shall not be used to replace sick leave, vacation or another applicable leave entitlement.

6. Eligibility and Approval
The Executive Director shall determine whether a position is suitable for hybrid or remote work, taking into consideration:

a) the nature and requirements of the position;
b) the ability to perform required duties effectively away from the office;
c) service delivery and accessibility requirements;
d) confidentiality and information-security requirements;
e) availability of appropriate technology and equipment;
f) the employee's performance, reliability and ability to work independently; and
g) operational, meeting and event requirements.

Approval of a hybrid or remote work arrangement may be subject to reasonable conditions established by the Executive Director.

7. Work Hours and Availability
Employees working remotely shall maintain their regular work schedule unless a different schedule has been approved. Employees are expected to remain available during scheduled working hours, attend required meetings and respond to work communications within reasonable expectations.

Remote work does not alter an employee's hours of work, compensation, performance expectations or responsibility to meet established deadlines.

8. Work Location and Workspace
Remote work shall be performed from a location that is reasonably suitable for the employee's duties and does not create an unacceptable risk to confidentiality, safety or service delivery. DOBIA may require an employee to work from the office where the remote location or circumstances are not reasonably suitable for the work.

Employees shall maintain a work environment that permits them to perform their duties effectively and participate in required communications.

9. Equipment and Technology
DOBIA may provide equipment or technology reasonably necessary for approved remote work, subject to budget, operational requirements and the employee's position. DOBIA-owned equipment shall remain the property of DOBIA and shall be used and protected in accordance with applicable policies.

Employees shall take reasonable measures to protect equipment from loss, theft, damage and unauthorized access. Employees shall report technology problems, loss of equipment or suspected security incidents promptly.

10. Confidentiality and Information Security
Employees working remotely shall maintain the same confidentiality and information-security standards that apply in the DOBIA office. Employees shall:

a) protect confidential and personal information from unauthorized access;
b) use secure connections and approved systems where required;
c) prevent unauthorized persons from viewing or accessing DOBIA information;
d) secure documents and equipment when unattended; and
e) comply with DOBIA's Records Management Policy and applicable technology and privacy requirements.

Remote work shall not involve storing or transmitting confidential DOBIA information through unauthorized personal accounts or systems.

11. Health and Safety
Employees are responsible for maintaining a reasonably safe remote work environment and complying with applicable health and safety requirements. Employees shall promptly report work-related injuries or incidents that occur while performing authorized work remotely.

DOBIA may take reasonable steps to assess or address health and safety concerns associated with an approved remote work arrangement, subject to applicable privacy and legal requirements.

12. Meetings, Service and Collaboration
Employees shall participate in meetings and maintain communication with colleagues, members, stakeholders and other contacts as required by their role.

Remote work shall not interfere with required in-person meetings, events, member service, Board activities or other operational responsibilities. Employees may be required to attend the DOBIA office or another work location for meetings, events, training or operational needs.

13. Performance and Accountability
Employees working remotely remain subject to the same performance, conduct, attendance, confidentiality and accountability expectations as employees working in the office. Performance concerns may result in modification, suspension or withdrawal of a hybrid or remote work arrangement where appropriate.

Remote work is a work arrangement and not a substitute for effective performance management or supervision.

14. Expenses
DOBIA will determine which work-related expenses or equipment associated with remote work are eligible for reimbursement, subject to the Financial Policies & Procedures Manual, approved budgets and any applicable employment terms.

Employees shall obtain any required approval before incurring reimbursable expenses.

15. Accommodation
Requests for remote or hybrid work that are made as a workplace accommodation shall be assessed separately under applicable human rights and employment legislation. An accommodation arrangement may differ from the general requirements of this Policy where required to the point of undue hardship.

16. Review and Modification of Arrangements
Hybrid and remote work arrangements may be reviewed periodically or when operational circumstances change.

DOBIA may modify or end an approved arrangement where reasonably necessary because of operational requirements, changes in duties, performance concerns, technology or security requirements, or other legitimate workplace considerations.

Employees will be provided reasonable notice of changes where practicable.

17. Responsibilities
Employees:

a) comply with the approved work arrangement and schedule;
b) remain available and meet performance expectations;
c) protect DOBIA information and property;
d) maintain an appropriate and safe work environment;
e) attend the office, meetings and events when required; and
f) promptly report circumstances that affect their ability to work remotely.

Executive Director

a) assess eligibility and approve hybrid and ad hoc remote work arrangements within delegated authority;
b) ensure arrangements meet operational requirements;
c) monitor performance and service delivery;
d) address concerns and modify arrangements where appropriate; and
e) ensure the Board Chair is involved where this Policy requires Chair approval.

Board Chair:
The Board Chair shall approve ad hoc remote work requests made by the Executive Director and exercise any other authority assigned under this Policy.

18. Related Documents

Employee & Human Resources Handbook
Financial Policies & Procedures Manual
Records Management Policy
Conflict of Interest Policy
Workplace Anti-Harassment & Anti-Violence Policy
Sick Leave & Medical Absence Policy
Applicable employment agreements
Applicable legislation

19. Administration and Review

The Executive Director is responsible for the administration of this Policy within delegated authority. The Board may amend this Policy by resolution.

Where this Policy conflicts with applicable legislation, the legislation prevails. Where an employment agreement provides a greater lawful entitlement, the employment agreement governs that entitlement.

WORKPLACE ANTI-VIOLENCE & ANTI-HARASSMENT POLICY

Authority	Governance Manual; applicable legislation and City of Orillia requirements
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every 2 years, or as required

1. Purpose

DOBIA is committed to providing a safe and secure workplace for employees, members and volunteers that demonstrates mutual respect and consideration. The workplace shall be free from harassment and violence. The purpose of this Policy is to:

a) maintain a working environment free from harassment, sexual harassment and workplace violence;
b) make clear that harassment, sexual harassment and workplace violence are unacceptable;
c) reduce potential for workplace harassment and violence before an incident occurs; and
d) establish a mechanism for reporting, investigating and responding to concerns and incidents.

2. Application

This Policy applies to all DOBIA employees, members and volunteers.

It applies to conduct occurring in the workplace and to employment-related conduct occurring outside the normal workplace, including work-related travel, training, events, meetings and electronic or social-media communications where the conduct has a sufficient connection to the workplace or DOBIA activities.

DOBIA will support and assist employees, members and volunteers who experience workplace harassment, sexual harassment or workplace violence by employees or non-employees. Appropriate performance management, counselling, appraisal and discipline, when reasonably carried out for legitimate workplace purposes, are not themselves workplace harassment.

3. Legislative Framework

This Policy is intended to operate in accordance with the Occupational Health and Safety Act (OHSA), the Human Rights Code and other applicable legislation.
DOBIA shall maintain measures and procedures for reporting, investigating and responding to workplace harassment and workplace violence, including appropriate confidentiality protections. Where legislation provides a greater protection or requirement than this Policy, the legislation prevails.

4. Definitions

Workplace

Any place where business or work-related activities are conducted, including DOBIA premises, work assignments outside DOBIA locations, work-related travel, training, meetings, events and other work-related activities.

Workplace Harassment

Engaging in a course of vexatious comment or conduct against a worker in a workplace that is known or ought reasonably to be known to be unwelcome. Harassment may include inappropriate conduct, comment, display, action or gesture that adversely affects a worker's psychological or physical well-being, is known or ought reasonably to be known to cause humiliation or intimidation or constitutes a threat to the worker's health and safety. Examples may include, but are not limited to:

a) hostile or degrading comments,
b) rumours or gossip,
c) offensive jokes or remarks,
d) cyberbullying,
e) threats,
f) unwanted practical jokes,
g) stalking or inappropriate following,
h) deliberate interference with work,
i) persistent criticism or belittling,
j) unwelcome physical contact,
k) sexual innuendo,
l) offensive images,
m) aggressive gestures
n) humiliating or demeaning conduct based on a protected characteristic.

Workplace Sexual Harassment

Workplace harassment because of sex, sexual orientation, gender identity or gender expression, including a sexual solicitation or advance where the person making it is in a position to confer, grant or deny a benefit or advancement and knows or ought reasonably to know that it is unwelcome.

Workplace Violence

The exercise of physical force by a person against a worker in a workplace that causes or could cause physical injury; an attempt to exercise physical force that could cause physical injury; or a statement or behaviour that it is reasonable for a worker to interpret as a threat to exercise physical force against the worker.

Domestic Violence
A pattern of coercive tactics that can include physical, psychological, sexual, economic and emotional abuse perpetrated by one person against an adult partner with the goal of establishing and maintaining power and control over the victim.

Prohibited Conduct
Harassment, sexual harassment, workplace violence, threats, intimidation, stalking, discriminatory conduct, retaliation and other unacceptable behaviour are prohibited. Employees, members and volunteers are expected to contribute to a workplace free from harassment and violence and to conduct themselves respectfully and professionally.

5. Responsibilities
Employees, Members and Volunteers:

a) treat others with respect and consideration;
b) report workplace harassment, sexual harassment or violence in accordance with this Policy;
c) cooperate reasonably with an investigation;
d) provide accurate information when reporting or participating in an investigation;
e) not retaliate against a person who makes a good-faith complaint or participates in an investigation.

Executive Director:

a) take reasonable steps to discourage harassment and violence and set an appropriate example;
b) receive and assess reports, ensure they are directed to the appropriate process;
c) investigate or arrange for investigation of potential workplace harassment or violence where required, including where no formal complaint has been made;
d) maintain appropriate records and confidentiality;
e) ensure employees receive information and training on this Policy; and
f) take immediate steps to protect safety where necessary.

Board:

The Board shall provide oversight where a complaint involves the Executive Director, a Director, or circumstances requiring Board authority. The Board shall ensure that persons with an actual or perceived conflict do not participate in the investigation or decision.

6. Duty to Report and Immediate Safety
Safety is DOBIA's primary concern. No employee, member or volunteer is expected to place themselves or another person at risk to address an incident.

If a person feels personally threatened, or if there is physical violence, an immediate threat, a serious criminal act or another emergency, emergency services or police shall be contacted as appropriate. Incidents of violence, vandalism, threatening situations or suspected illegal activity shall be reported to police where required or appropriate.

All workplace harassment and violence concerns should be reported promptly. A report may be made even where the person affected does not wish to pursue a formal complaint, as DOBIA may have an obligation to investigate or take protective action.

7. Reporting a Complaint

A person who believes they have experienced or witnessed workplace harassment, sexual harassment or workplace violence should report the matter as soon as reasonably possible. Reports may be made to the Executive Director. If the complaint concerns the Executive Director, it shall be made to the Board Chair. If the complaint concerns the Board Chair, it shall be made to the Vice-Chair or another Officer designated by the Board.

A person may be accompanied or represented by a person of their choice, including legal counsel, subject to reasonable process requirements. A person may withdraw a complaint or decline further participation; however, DOBIA may continue to investigate or take action where required to protect workers or comply with law.

8. Incident Documentation

Reports should include, where known:

a) date, time, and location of the incident;
b) names or descriptions of persons involved;
c) names and contact information of witnesses where available;
d) a description of what occurred, including relevant words or actions;
e) whether police, emergency services or another third party was contacted; and
f) any other information relevant to the incident or investigation.

DOBIA's Workplace Harassment or Violence Incident Report Form may be used to document an incident. The form is a supporting administrative tool and may be updated without amending this policy.

9. Assessment and Investigation

The Executive Director, Board Chair or designated Board representative shall conduct an initial assessment to determine the appropriate response.

Depending on the circumstances, the matter may be resolved informally, investigated internally by an appropriate person, referred to an external investigator, or referred to another appropriate authority. An investigator shall be impartial and independent of the matter to the extent reasonably possible.

The complainant and the person whose conduct is the subject of the complaint shall have a reasonable opportunity to provide relevant information and respond to allegations.

DOBIA may investigate potential workplace harassment or violence even where no formal complaint has been made.

10. Confidentiality
Information obtained about an incident or complaint, including identifying information about individuals involved, shall be kept confidential to the greatest degree reasonably possible. Information shall be disclosed only where necessary for investigating or taking corrective action, for workplace safety, for legal obligations, or as otherwise required by law.

11. Results and Corrective Action
The complainant and the person whose conduct was investigated shall be informed of the results of the investigation and any corrective action that has been taken or that will be taken, to the extent permitted by law.

Where conduct is found to be inconsistent with this Policy, DOBIA may take reasonable and proportionate action within its authority. Depending on the circumstances, this may include:

a) a direction or warning to stop the conduct;
b) mediation or facilitated resolution where appropriate;
c) workplace or communication restrictions;
d) training, coaching or other corrective measures;
e) discipline where appropriate and legally permitted;
f) conditions on participation in a DOBIA communication, activity, meetings or events where permitted;
g) referral to another authority or process; or
h) other lawful measures necessary to protect employees, members, volunteers, or the public.

Nothing in this Policy authorizes the Board to remove a Director from office where removal is reserved to the City or another authority.

12. Immediate Restrictions and No-Contact Measures
Where necessary to protect safety or the integrity of an investigation, DOBIA may impose reasonable interim measures, including directing an individual to cease an interaction, leave DOBIA office space or refrain from contacting a particular employee, volunteer, member or representative through specified channels.

No person should physically confront or attempt to remove another person. Police or other appropriate authorities shall be contacted where necessary.

Any restriction on a member's participation or access shall be imposed only within DOBIA's authority and in accordance with applicable municipal requirements.

13. Good-Faith Complaints and No Reprisal
The DOBIA encourages people to report concerns in good faith. No employee, member or volunteer shall be penalized, threatened or subjected to retaliation for making a good-faith complaint or participating in an investigation.

Knowingly making a false allegation may result in appropriate corrective action. A complaint that is not substantiated is not, by itself, evidence that it was made in bad faith.

14. Risk Assessment, Training and Prevention
DOBIA shall take reasonable measures to identify and address risks of workplace violence and harassment as part of its health and safety and risk-management processes. Employees shall receive information and training appropriate to their responsibilities, including how to recognize, report and respond to workplace harassment and violence. New employees shall be made aware of this Policy as part of orientation.

15. Domestic Violence
DOBIA recognizes that domestic violence may enter the workplace and may expose workers to risk. Where DOBIA becomes aware of domestic violence that would likely expose a worker to physical injury in the workplace, DOBIA will take reasonable precautions to protect the worker and other persons in the workplace, consistent with applicable law and available information.

Employees are encouraged to inform the Executive Director or Board Chair where workplace safety may be affected by domestic violence. Information will be handled confidentially to the extent reasonably possible.

16. External Assistance
Nothing in this Policy prevents an individual from seeking assistance or exercising rights under applicable legislation or through an appropriate external authority, including the Ontario Human Rights Commission, the Ministry responsible for workplace health and safety, police or emergency services, or legal counsel.

17. Complaints Involving Staff, the Executive Director or a Director
A complaint involving an employee shall be administered through this Policy with appropriate management or Board oversight.

A complaint involving the Executive Director shall be reported to the Board Chair and administered independently of the Executive Director.

A complaint involving the Board Chair shall be reported to the Vice-Chair or another Officer designated by the Board.

A complaint involving a Director shall be handled so that the Director does not participate in the investigation or decision where a conflict exists.

Where an allegation involves both workplace and member/Board conduct, the matter shall be assessed to determine which policy or process applies. The Workplace Anti-Violence & Anti-Harassment Policy governs workplace harassment and workplace violence.

18. Records

Records relating to complaints, investigations, corrective action and training shall be maintained securely and retained in accordance with DOBIA's Records Management Policy, applicable legislation and any applicable retention requirements.

19. Administration and Review

The Executive Director is responsible for the day-to-day administration of this Policy, except where the matter involves the Executive Director or another circumstance requiring Board oversight.

The Board may amend this Policy by resolution.

This Policy shall be reviewed at least every two (2) years and whenever legislative or organizational changes require review.

20. Related Documents and Authorities

Occupational Health and Safety Act
Human Rights Code
Workplace Safety and Insurance Act, 1997
Employee & Human Resources Handbook
Health & Safety Policy
Member Conduct, Respectful Communication & Complaints Policy
Conflict of Interest Policy
Records Management Policy
Workplace Harassment or Violence Incident Report Form
Applicable municipal policies and by-laws and employment agreements

APPENDIX A: DOBIA WORKPLACE HARASSMENT OR VIOLENCE INCIDENT REPORT FORM

Confidential — Administrative reporting form

Complete as much information as reasonably possible. If there is an immediate threat to safety, contact emergency services or police first. Submit to the Executive Director. If the concern involves the Executive Director, submit to the Board Chair. If it involves the Board Chair, submit to the Vice-Chair or another Officer designated by the Board.

1. Person Reporting

Name: Phone / Email:

Relationship to DOBIA ☐ Employee ☐ Volunteer ☐ Member ☐ Other:

Did you witness the incident? ☐ Yes ☐ No If no, who reported it to you?

2. Incident Details

Date: Approximate time:

Location: Person(s) involved:

Business / organization, if applicable:

3. Witnesses

List witnesses where known. Attach another sheet if necessary.

Name and Position: Phone/Email:

Description/Identifying Information:

4. Type of Concern

☐ Harassment ☐ Physical violence

☐ Sexual harassment ☐ Intimidation / threatening behaviour

☐ Verbal threat or assault ☐ Physical contact

☐ Workplace bullying ☐ Obscene / vulgar language or acts

☐ Stalking / unwanted following or contact ☐ Discriminatory or degrading conduct

☐ Other: _____

5. Detailed Description

Describe what occurred, including relevant words or actions, the sequence of events, and any other information that may assist with assessing the concern. Record direct quotations where reasonably possible.

_____

_____

_____

_____

6. Immediate Safety / Impact
Describe any injury, immediate safety concern, property damage, disruption to work, or other relevant impact. Do not include unnecessary medical details.

_____
_____
_____
_____

7. Third-Party Involvement
☐ Police ☐ Fire Department ☐ Paramedics / Ambulance ☐ Other: _____

Agency / Contact	Occurrence / Reference Number
Name / Position	Contact Information
Additional information:	

8. Other Relevant Information

_____
_____
_____
_____

9. Declaration
I confirm that the information provided is accurate to the best of my knowledge. I understand DOBIA may need to investigate or take action where required for safety, legal compliance or other legitimate reasons.

Name / Signature:	Date:
Preferred method of contact:	

FOR DOBIA USE ONLY

Date received:	Received by:
Initial assessment date:	Person responsible:
Investigation required ☐ Yes ☐ No ☐ Referred	Date closed
Outcome / action:	

Confidential — Retain securely in accordance with DOBIA's Records Management Policy and applicable law.

APPENDIX B: DOBIA INVESTIGATION OUTCOME & CORRECTIVE ACTION NOTICE

Use following an investigation under the Workplace Anti-Violence & Anti-Harassment Policy to document the outcome communicated to the person involved and, where appropriate, corrective or protective measures.

1. Matter Information

Date:	Recipient:
Position / Organization:	
Decision-maker:	

2. Nature of the Concern

Briefly identify the conduct investigated, without disclosing unnecessary confidential information about others.

_____

_____

_____

3. Investigation Outcome

☐ Substantiated — conduct was found to be inconsistent with the Policy.

☐ Unsubstantiated — available information did not establish a Policy violation.

☐ Inconclusive — available information was insufficient to reach a conclusion.

☐ Resolved through an informal or other appropriate process.

☐ Other: _____

4. Findings / Summary

_____

_____

_____

5. Corrective, Protective or Other Action

☐ Direction to cease the conduct

☐ Written warning / corrective notice

☐ Communication or contact restrictions

☐ Training, coaching or education

☐ Mediation or facilitated resolution

☐ Workplace or scheduling measures

☐ Participation or attendance restrictions within DOBIA's authority

☐ Referral to police or another external authority

☐ Other lawful corrective or protective action: _____

Details:_____

_____

6. Follow-Up / Further Conduct

Identify expectations, follow-up dates, monitoring requirements or other measures, where appropriate. Any restriction or consequence must be consistent with the Policy and DOBIA's legal authority.

_____

_____

_____

_____

7. Notice

DOBIA is committed to a safe, respectful and professional environment. The recipient is expected to comply with this notice and the Workplace Anti-Violence & Anti-Harassment Policy. Questions may be directed to the Executive Director, or to the Board Chair where the matter involves the Executive Director.

8. Acknowledgement

Signature acknowledges receipt of this notice, not necessarily agreement with its contents.

DOBIA Representative Signature:_____

Date:

FOR DOBIA USE ONLY

Date issued:	Issued by:
Copy provided to recipient: ☐ Yes ☐ No	

Confidential — Retain securely in accordance with DOBIA's Records Management Policy and applicable law.

DOBIA ACCESSIBILITY POLICY

Authority	Board-approved policy; applicable legislation; Governance Manual
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or if legislation, organization structure or requirements change

1. Purpose

The Downtown Orillia Business Improvement Area (DOBIA) is committed to providing an accessible, inclusive and respectful environment in which people with disabilities can participate in and access DOBIA's goods, services, facilities, employment, communications, programs and activities.

This Policy establishes DOBIA's commitment to identifying, preventing and removing barriers to accessibility and to meeting its obligations under the Accessibility for Ontarians with Disabilities Act, 2005 (AODA), the Integrated Accessibility Standards Regulation, the Ontario Human Rights Code and other applicable requirements.

2. Scope

This Policy applies to the Board of Directors, employees, volunteers, committee members and other individuals acting on behalf of DOBIA, as applicable to their roles. It applies to DOBIA's interactions with members of the public, businesses, stakeholders, event participants, suppliers, contractors and other persons who access DOBIA's goods, services, facilities or activities.

Where an accessibility requirement applies only to organizations meeting a specified employee threshold or other condition, DOBIA shall comply when that requirement becomes applicable.

3. Guiding Principles

Dignity: Services and interactions are provided in a way that respects the dignity and independence of persons with disabilities.

Independence: People with disabilities are supported in making their own choices and accessing services as independently as possible.

Integration: People with disabilities should be able to access and participate in DOBIA services and activities in the same or similar manner as others, wherever reasonably possible.

Equal opportunity: People with disabilities should have an opportunity to benefit from and participate in DOBIA services, programs, employment, and activities.

4. Accessible Customer Service

DOBIA will make reasonable efforts to ensure that its goods, services, facilities and activities are accessible to persons with disabilities. These efforts may include but are not limited to:

a) communicating with people in a manner that takes disability-related needs into account;
b) permitting assistive devices where reasonably necessary, subject to legitimate safety requirements;
c) welcoming service animals and support persons in accordance with applicable law;
d) providing notice when an accessibility feature or facility normally used by persons with disabilities is temporarily unavailable, where required;
e) providing reasonable alternative methods of service where a barrier prevents access in the usual manner; and
f) ensuring staff and volunteers know how to respond when a person with a disability is experiencing difficulty accessing DOBIA's goods, services or activities.

5. Assistive Devices, Service Animals and Support Persons

Persons with disabilities may use their own assistive devices to access DOBIA's goods, services and activities, subject to applicable law and legitimate safety requirements.

Service animals shall be welcomed in areas open to the public, subject to applicable legal exceptions. Where it is not readily apparent that an animal is a service animal, DOBIA may request documentation permitted by law.

Support persons shall be permitted where required for access, subject to applicable law and legitimate safety requirements. DOBIA will not unnecessarily separate a person with a disability from a support person or service animal.

6. Communication and Accessible Information

DOBIA will communicate with persons with disabilities in a manner that takes their disability into account and will provide or arrange accessible formats or communication supports when required and reasonably available.

When an accessible format or communication support is requested, DOBIA will work with the individual to determine an appropriate format or support. Where the AODA requires an accessible format, DOBIA will provide it in a timely manner and at no additional cost beyond what would normally be charged.

DOBIA will consider accessibility when preparing public notices, event information, forms, policies, reports, presentations and other communications.

7. Accessible Events and Activities

DOBIA will consider accessibility in the planning, promotion and delivery of events, programs and activities that it organizes or supports.

Event information should identify available accessibility features and how participants can request accommodation. Where DOBIA controls the event location, reasonable efforts will be made to select or arrange an accessible venue and accessible routes.

Event registration and participation processes should provide a practical method for requesting accommodation.

Accessibility requirements should be considered when selecting vendors, entertainers, contractors and service providers.

Where an event occurs in a public space controlled by another organization, DOBIA will communicate relevant accessibility needs to the responsible authority where reasonably practicable.

8. Employment and Workplace Accessibility

DOBIA is committed to accessible employment practices and to accommodating employees and applicants with disabilities in accordance with the Ontario Human Rights Code, the AODA and applicable employment requirements. Practices may include but are not limited to:

a) notifying applicants and employees that accommodation is available during recruitment and employment processes;
b) providing individualized accommodation where required, subject to applicable law;
c) developing individualized accommodation or return-to-work plans where appropriate;
d) considering accessibility when reviewing job descriptions, performance processes, training and workplace procedures; and
e) maintaining confidentiality of disability-related and accommodation information and limiting access to persons who require the information for legitimate employment purposes.

Workplace accommodation is administered in conjunction with DOBIA's Sick Leave & Medical Absence Policy and other applicable employment policies.

9. Training

DOBIA will provide accessibility training to employees and volunteers, and to other individuals where required by the AODA or appropriate to their responsibilities, including:

a) the purposes of the AODA and accessible customer service requirements;
b) how to interact and communicate with people with various types of disabilities;
c) how to interact with people who use assistive devices or require service animals or support persons;
d) how to use accessibility equipment or devices available through DOBIA;
e) what to do if a person with a disability is having difficulty accessing DOBIA's goods, services or activities;
f) the Ontario Human Rights Code as it relates to persons with disabilities; and
g) accessibility requirements relevant to the individual's duties.

Training will be provided as soon as practicable after an individual begins applicable duties and when accessibility policies or requirements change. Where required by law, DOBIA will maintain training records.

10. Accessibility Feedback and Complaints
Feedback or complaints may be directed to the Executive Director. Where the concern involves the Executive Director, it may be directed to the Board Chair.

DOBIA will acknowledge and review accessibility complaints and, where appropriate, take reasonable steps to address identified barriers or service issues. No person will be subject to reprisal for making a good-faith accessibility complaint or providing accessibility feedback.

11. Temporary Disruptions
Where an accessibility feature or service used by persons with disabilities is temporarily unavailable, DOBIA will provide notice of the disruption where required and reasonably practicable. The notice will identify the reason, anticipated duration where known, and available alternatives.

12. Procurement
Where reasonably practicable, accessibility will be considered when DOBIA purchases or leases goods, services, facilities, technology, communications tools, event services or equipment. Procurement decisions will also comply with the Financial Policies & Manual.

13. Digital Accessibility
DOBIA will consider accessibility when purchasing or implementing websites, online forms, documents, communications platforms and other digital tools.

Where website or web-content accessibility requirements apply to DOBIA, the organization will comply with the applicable AODA requirements, including applicable Web Content Accessibility Guidelines (WCAG) requirements. DOBIA will also respond to individual requests for accessible digital information or communication supports.

14. Physical Access and Public Spaces
DOBIA will consider accessibility when it controls or directly manages physical spaces used for its services or activities. Where a space is owned, controlled or maintained by another organization, DOBIA will work with the responsible organization where reasonably practicable to identify and address accessibility barriers relevant to DOBIA's activities. Nothing in this Policy requires DOBIA to undertake structural changes to property it does not own or control.

15. Accommodation and Undue Hardship
DOBIA recognizes its obligation to accommodate persons with disabilities to the point of undue hardship, where applicable under the Ontario Human Rights Code or other law. Accommodation will be considered individually.

DOBIA may request information reasonably necessary to understand functional limitations and accommodation needs but will not request unnecessary medical or personal information.

16. Roles and Responsibilities

Board of Directors

a) approve this Policy and significant amendments;
b) provide governance oversight for accessibility;
c) support an organizational culture that promotes inclusion and accessibility.

Executive Director

a) administer this Policy;
b) ensure applicable accessibility requirements are incorporated into operations;
c) coordinate accessibility training and maintain required records;
d) respond to accessibility feedback and complaints;
e) incorporate accessibility into relevant procurement, event planning, communications and employment processes;
f) report significant accessibility matters to the Board where appropriate.

Employees, Volunteers and Committee Members

a) follow this Policy and applicable procedures;
b) participate in required accessibility training;
c) treat persons with disabilities with dignity and respect;
d) identify and report accessibility barriers or concerns to the Executive Director.

17. Compliance

DOBIA will comply with applicable requirements of the AODA, its regulations and standards, the Ontario Human Rights Code and other applicable legislation. Where legislation establishes a higher or different requirement than this Policy, the legislation prevails to the extent of the inconsistency.

18. Policy Review

This Policy shall be reviewed periodically and whenever there is a significant change to applicable accessibility legislation, DOBIA operations or accessibility requirements. The Executive Director may recommend amendments to the Board; amendments requiring Board approval shall be approved by the Board.

19. Related Documents

Member Conduct, Respectful Communication & Complaints Policy
Sick Leave & Medical Absence Policy
Flex Remote Work Policy
Financial Policies & Manual
Event Planner / Event Planning materials

20. Applicable Legislation

Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, c. 11
Integrated Accessibility Standards, O. Reg. 191/11
Accessibility Standards for Customer Service, O. Reg. 429/07
Ontario Human Rights Code, R.S.O. 1990, c. H.19

C. Operations

Event Planning & Management Policy
Vehicle & Fleet Use Policy
Sidewalk Use Policy
Records Management Policy

DOBIA EVENT PLANNING & MANAGEMENT POLICY

Authority	Board-approved policy; applicable municipal requirements; Financial Policies & Manual; Governance Manual
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or sooner where legislation, municipal requirements or DOBIA event practices change

1. Purpose

The purpose of this Policy is to establish a consistent framework for events organized, supported, sponsored or coordinated by the Downtown Orillia Business Improvement Area. The Policy is intended to ensure that events align with DOBIA's mandate, are appropriately planned and supported, and address financial, safety, insurance, accessibility, permitting, operational and evaluation requirements.

2. Scope

This Policy applies to events organized directly by DOBIA and to events for which DOBIA provides financial support, significant staff or operational support, DOBIA equipment or resources, or presents the event as a DOBIA-supported event.

Event organizers remain responsible for the event and for obtaining all permits, licences, approvals and insurance required by the City of Orillia or other authorities. DOBIA support does not replace regulatory approval.

3. Event Categories

a) *DOBIA-Organized Events*: Events for which DOBIA is the event organizer and is responsible for planning and delivery

b) *DOBIA-Supported Events:* Events organized by another person, business, organization or community partner that receive DOBIA funding, sponsorship, staff support, equipment, coordination or other resources.

c) *Events Requiring DOBIA Review:* Review and approval may be needed where an event:

- requests financial support from DOBIA;
- requests significant DOBIA staff or operational support;
- requires use of DOBIA equipment or other resources;
- requires a downtown road closure involving DOBIA coordination;
- is organized directly by DOBIA; or
- is otherwise presented as a DOBIA-supported event.

4. Event Working Group

Events must have an event working group of at least three (3) people, including the event organizer.

For a new event intended to become an annual event, a member of DOBIA staff should participate in the first year where appropriate. The working group should establish clear responsibility for:

a) event planning
b) budget and financial management
c) sponsorship
d) marketing and communications
e) volunteers
f) vendors and activity providers
g) safety
h) permits and approvals
i) event-day operations
j) post-event evaluation

The event organizer remains responsible for overall planning and for submitting all required information and documentation.

5. Event Application and Approval

Events requesting DOBIA financial or significant operational support shall provide sufficient information for the Board to assess the event and determine whether it aligns with DOBIA's mandate and interests. A support request should include, as applicable:

a) event purpose and objectives
b) target audience
c) event date, time, and location
d) event plan
e) budget
f) DOBIA funding request
g) safety plan
h) insurance information
i) required permits and approvals
j) marketing and promotion plan
k) expected attendance
l) road closure requirements
m) volunteer and staffing requirements
n) post-event evaluation plan

Requests for DOBIA support are reviewed through the applicable approval process. Approval of funding or other DOBIA support is subject to Board authority, available resources and compliance with applicable requirements.

6. Planning and Timelines

Event planning should begin as early as reasonably practicable, taking into account the complexity of the event and any municipal or regulatory timelines.

DOBIA's Event Planner provides recommended planning milestones, including early confirmation of the event concept, location, budget, working group, sponsors, permits, insurance and road-closure requirements; development of the safety and site plans; confirmation of vendors, volunteers, equipment and emergency procedures; and post-event reconciliation and evaluation.

7. Budget and Financial Support

A realistic event budget shall identify expected revenue and expenses. Depending on the event, these may include entertainment, equipment, tents or structures, security, first aid, insurance, permits, traffic control, advertising, printing, signage, décor, prizes and giveaways.

Requests for financial sponsorship from DOBIA shall be made in writing to the Marketing, Programming & Sponsorship Committee and shall include an event budget. Final funding decisions rest with the DOBIA Board.

The current Event Planner recommends that funding requests be submitted at least sixteen (16) weeks before the event. Requests made after an event has taken place will not normally be considered.

All DOBIA-funded expenditures shall comply with the Financial Policies & Manual and applicable delegated spending authority.

8. Safety and Risk Management

The event organizer shall develop a safety plan appropriate to the size, location and risk. Safety planning shall consider, as applicable:

a) weather and event cancellation or relocation
b) security and crowd management
c) lost children and vulnerable persons
d) first aid and medical response
e) emergency communication
f) traffic and pedestrian safety
g) emergency access
h) fire and electrical safety
i) structures, tents and equipment
j) incident reporting and emergency response

The organizer shall identify who has authority to cancel or relocate the event and how that decision will be communicated.

Emergency services shall be contacted whenever required. Serious incidents involving DOBIA property, staff, volunteers or significant DOBIA-supported events shall be reported to the DOBIA office as soon as reasonably possible.

9. Insurance
Insurance requirements shall be confirmed early in the planning process. Where insurance is required, the event organizer shall provide the required Certificate of Insurance to DOBIA within the timeframe specified by DOBIA.

The current Event Planner identifies Commercial General Liability coverage of at least $2,000,000 as an existing DOBIA event requirement, subject to review by the City of Orillia. Additional coverage may be required depending on the nature and risk of the event.

Event organizers shall confirm appropriate insurance requirements for vendors, entertainers, contractors and activity providers where required.

10. Permits, Licences and Approvals
Event organizers are responsible for identifying and obtaining all permits, licences and approvals that apply to their event. DOBIA approval or support does not replace municipal or other regulatory approvals.

Road closures shall be planned and submitted through the applicable DOBIA process where DOBIA involvement is required. Site plans should identify the closure location and timing, traffic-control measures, event structures and equipment, washrooms, security, emergency access and fire-hydrant locations.

Where applicable, the Event Planner identifies a minimum six-metre emergency access route through closed streets. Traffic-control personnel must meet applicable training, equipment and positioning requirements.

11. Vendors, Contractors and Activity Providers
Event organizers shall ensure that vendors, entertainers, contractors and activity providers are appropriate for the event and that required agreements, licences, permits, insurance and safety requirements are addressed.

Where DOBIA requests additional insurance or other documentation, the organizer shall provide it within the required timeframe.

Event organizers shall confirm the responsibilities of vendors and activity providers for set-up, operation, safety, take-down and incident reporting.

12. Marketing and Promotion
Marketing and promotional activities for DOBIA-supported events shall be consistent with the approved event purpose, DOBIA brand requirements and any applicable Board direction.

Public event information should clearly identify the event organizer and, where applicable, the nature of DOBIA's support.

Marketing should communicate key accessibility, location, timing and participation information relevant to attendees.

13. Accessibility
DOBIA-supported events shall consider accessibility in planning, promotion and delivery and shall comply with applicable legal requirements and the Accessibility Policy.

Event organizers should consider accessible routes, seating, parking, service animals, communication needs and other measures that reduce barriers to participation.

Where an event takes place in a public space controlled by another authority or property owner, DOBIA will communicate relevant accessibility needs where reasonably practicable.

14. Event-Day Responsibilities
The event organizer and working group shall establish clear event-day roles and contacts and ensure that required documentation is accessible to the event team.

Set-up and take-down shall be planned in advance, including equipment delivery, vendor arrival, road closures, electrical connections, tents and structures, signage, waste and recycling, washrooms and emergency access.

Traffic-control devices and barriers shall not be removed until it is safe to reopen the area.

15. Workplace Harassment and Violence
Events involving DOBIA staff, volunteers or working-group members shall comply with the Workplace Anti-Violence & Anti-Harassment Policy.

Event organizers shall ensure that staff, volunteers and working-group members understand their responsibilities and know how concerns are reported.

16. Cancellation, Relocation and Inclement Weather
Event organizers shall establish procedures for responding to extreme heat, high winds, heavy rain, lightning, severe weather and other conditions that may affect safety.
The responsible decision-maker shall determine whether an event will proceed, be cancelled, delayed, or relocated, based on the established event plan and applicable authority.
Cancellation or relocation decisions shall be communicated promptly to staff, volunteers, vendors, participants and the public as appropriate.

17. Post-Event Reconciliation and Evaluation
Following an event supported by DOBIA, the organizer shall complete any required financial reconciliation, return DOBIA equipment, document incidents or issues, gather feedback and evaluate the event. Evaluation should consider, as applicable:

a) attendance and participation

b) business impact
c) marketing results
d) community and partner participation
e) volunteer participation
f) financial results
g) safety or operational issues
h) unexpected challenges
i) lessons learned
j) whether the event should be repeated or continue to receive DOBIA support

A written debrief is required following DOBIA-supported events where directed by DOBIA or required by the Event Planner. Where required, it should include a summary of the event, attendance, financial results, completed activities, marketing results, feedback, safety or operational issues, lessons learned and recommendations.

18. Records

Event applications, approvals, budgets, funding decisions, insurance certificates, permits, incident reports, evaluations and other required event records shall be maintained in accordance with DOBIA's Records Management Policy and applicable law.

19.0 Responsibilities

Event Organizer:

a) plan and coordinate the event;
b) submit required applications and documentation;
c) obtain required permits, licences and insurance;
d) manage vendors, volunteers and event-day responsibilities;
e) implement the approved safety and emergency plans;
f) complete post-event financial reconciliation and evaluation.

Executive Director

a) provide guidance on DOBIA requirements;
b) coordinate the applicable internal review and approval process;
c) administer approved DOBIA support and resources;
d) escalate significant risks, incidents or issues to the Board where appropriate.

Board:

a) approve event funding or other matters requiring Board authority;
b) provide direction on significant events or risks;
c) receive reports and evaluations where appropriate.

20. Related Documents

Event Planner
Financial Policies & Manual
Accessibility Policy

Workplace Anti-Violence & Anti-Harassment Policy
Member Conduct, Respectful Communication & Complaints Policy
Insurance and insurance coverage arrangements
Records Management Policy
Applicable City of Orillia by-laws, permits and policies

21. Administration and Review

The Executive Director is responsible for the day-to-day administration of this Policy within delegated authority.

The Board may amend this Policy by resolution.

The Policy shall be reviewed periodically and whenever there are significant changes to event practices, municipal requirements or applicable legislation.

DOBIA VEHICLE & FLEET USE POLICY

Authority	Board-approved policy; applicable legislation; Financial Policies & Manual; Insurance & Risk Management arrangements
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four years, or sooner if vehicle operations, insurance requirements or applicable legislation changes

1. Purpose

The purpose of this Policy is to establish requirements for the safe, lawful and appropriate use of vehicles operated, owned or leased by the Downtown Orillia Business Improvement Area (DOBIA).

The Policy is intended to protect employees, volunteers, the public, vehicles and property; reduce the risk of injury and damage; define authorized vehicle use and eligible drivers; and promote safe driving and regulatory compliance.

2. Scope

This Policy applies to employees and other individuals authorized by DOBIA to operate a DOBIA vehicle. It applies to all DOBIA-owned, leased or otherwise controlled vehicles, including vehicles used for maintenance, events, transportation of DOBIA equipment or goods, or other authorized business purposes.

Where insurance requirements, a lease agreement or legislation imposes a more specific requirement, that requirement prevails.

3. Authorized Vehicle Use

DOBIA vehicles shall be used only for authorized DOBIA business. Authorized uses include, as applicable:

a) maintenance activities, including garbage removal and transportation of maintenance materials;
b) installation, removal and transportation of seasonal décor and other DOBIA assets;
c) moving or picking up items associated with downtown maintenance;
d) DOBIA-organized events and event-related transportation; and
e) other DOBIA business approved by the Executive Director.

Any proposed use outside normal authorized purposes requires advance approval from the Executive Director. Where the Executive Director is requesting the alternate use, approval shall be obtained from the Board Chair. Personal use of a DOBIA vehicle is not permitted.

4. Eligible Drivers

Only individuals authorized by DOBIA and covered by the applicable vehicle insurance may operate a DOBIA vehicle. Before being authorized to drive, an employee shall:

a) hold a valid driver's licence appropriate for the vehicle;
b) provide a copy of their driver's licence when requested;
c) provide an acceptable driver's abstract where required by DOBIA or its insurer;
d) confirm that they have read and understand this Policy; and
e) meet any additional requirements imposed by DOBIA's insurer or applicable law.

5. Driver Responsibilities
Authorized drivers shall:

a) obey the Highway Traffic Act and all other applicable traffic laws;
b) drive safely, attentively and free from impairment;
c) ensure all occupants use seat belts;
d) comply with distracted-driving laws and not use a handheld phone while driving;
e) operate the vehicle when they are physically and mentally capable of doing so safely;
f) secure the vehicle when unattended;
g) respect other road users and avoid unnecessary traffic violations;
h) document vehicle-related expenses in accordance with the Financial Policies & Manual; and
i) promptly report damage, safety concerns, licence suspension, relevant driving convictions or any condition that may affect safe driving.

Drivers shall not smoke or vape in a DOBIA vehicle, lend or authorize another person to use the vehicle, use the vehicle for driver training, or otherwise use it for an unauthorized purpose.

6. Pre-Trip and Post-Trip Inspection
Drivers shall complete a basic inspection before and after using a DOBIA vehicle and report any damage, defect or concern through the designated vehicle inspection record. The inspection should include, as applicable:

a) tires and tire pressure;
b) lights and signals;
c) fluid levels;
d) visible damage;
e) brakes and other obvious safety concerns;
f) fuel level;
g) required safety equipment; and
h) cleanliness and removal of garbage.

Any immediate safety concern shall be reported to the Executive Director, and the vehicle shall not be operated if a major defect makes it unsafe to drive.

7. Maintenance and Repairs
DOBIA shall maintain its vehicles in a safe and roadworthy condition and shall schedule required maintenance and inspections.

Drivers shall not perform repairs unless they are trained and authorized to do so.

A vehicle with a significant safety defect shall be removed from service until it has been inspected and, where required, repaired by an appropriately qualified mechanic.

8. Fuel and Operating Expenses
Fuel, fluids and other authorized vehicle expenses shall be charged and documented in accordance with the Financial Policies & Manual and any designated payment method.

Mileage reimbursement for the use of a personal vehicle for authorized DOBIA business is governed by the Financial Policies & Manual and is not addressed by this Policy.
Drivers shall not use DOBIA payment cards for personal purchases.

9. Vehicle Security and Storage
When unattended, DOBIA vehicles shall be locked and parked in a safe, authorized location. Vehicles shall normally be stored at the location designated by DOBIA or as otherwise directed by the Executive Director.

10. Vehicle Collision, Damage or Incident
In the event of a collision, damage or other vehicle incident:

a) attend to personal safety first and call 9-1-1 where emergency medical, fire or police services are required;
b) exchange information as required by law;
c) do not admit liability or promise payment on behalf of DOBIA without authorization;
d) notify the Executive Director as soon as reasonably possible;
e) document the incident, including photographs and witness information where safe and appropriate; and
f) complete the required DOBIA vehicle incident report.

Any police report, photographs, witness information or other relevant documentation shall be retained with the incident record.

11. Vehicle Breakdown
If a DOBIA vehicle breaks down, the driver shall:

a) move the vehicle to a safe location if it is safe and possible to do so;
b) activate hazard lights and use appropriate warning devices;
c) remain out of traffic lanes and never stand between the vehicle and oncoming traffic;
d) contact the office or authorized roadside assistance provider;
e) wear high-visibility equipment where work occurs near or on a roadway; and
f) not attempt repairs unless trained and authorized.

Drivers shall not change a tire, use booster cables or perform roadside repairs unless trained and authorized to do so.

12. Vehicle Fire
If a DOBIA vehicle catches fire, the driver shall immediately move to a safe location where possible, evacuate the vehicle, keep others away from the area and call 9-1-1.

No employee shall attempt to fight a vehicle fire unless trained, the fire is small, the employee believes it is safe to do so and there is a clear means of escape.

13. Emergency Safety Equipment
DOBIA vehicles shall carry safety equipment appropriate to the vehicle and its intended work. As a minimum, equipment should include, where applicable:

a) a properly secured ABC multi-purpose fire extinguisher;
b) a first aid kit;
c) a snow brush and window scraper;
d) a high-visibility vest.

14. Driver Impairment and Fitness to Drive
Employees shall not operate a DOBIA vehicle while impaired by alcohol, cannabis, drugs, medication, fatigue, illness or any other condition that could make driving unsafe. An employee who believes they are not fit to drive shall not operate the vehicle and shall notify the Executive Director.

Where a driver's licence is suspended, restricted in a manner affecting the employee's authorized driving, or otherwise no longer valid for the vehicle, the employee shall immediately notify the Executive Director and shall not drive until authorization is restored.

15. Traffic Fines and Violations
Drivers are personally responsible for fines, penalties and other consequences arising from their unlawful driving or parking conduct, unless otherwise determined by law.

Drivers shall promptly notify the Executive Director of any suspension, prohibition or other driving restriction that may affect their eligibility to operate a DOBIA vehicle.

DOBIA will not reimburse personal fines or penalties incurred while operating a DOBIA vehicle unless the Board determines otherwise in exceptional circumstances.

16. Insurance
DOBIA shall maintain vehicle insurance appropriate to its vehicles and authorized use, and drivers must be authorized and insured before operating a DOBIA vehicle.
Drivers shall cooperate with DOBIA and its insurer following a collision, claim or incident.

Insurance coverage does not permit a driver to use a vehicle for a purpose that is excluded by the policy or otherwise unauthorized by DOBIA.

17. Responsibilities

Employees / Authorized Drivers

a) follow this Policy and all applicable laws;
b) complete required inspections;
c) report defects, incidents and expenses;
d) operate vehicles safely and responsibly;
e) protect DOBIA vehicles and equipment.

Executive Director

a) authorize drivers and vehicle use;
b) ensure applicable insurance and records are maintained;
c) coordinate maintenance, inspections and repairs;
d) administer incident reporting and claims;
e) remove unsafe vehicles from service;
f) ensure this Policy is provided to authorized drivers.

Board

a) approve this Policy and significant amendments;
b) approve vehicle acquisition, disposal or decisions where Board authority is needed;
c) receive reports on significant vehicle incidents or risks where appropriate.

18. Records

DOBIA shall maintain appropriate records relating to authorized drivers, licences and abstracts where required, inspections, maintenance, fuel and operating expenses, incidents, collisions, claims and repairs. Records shall be maintained in accordance with the Records Management Policy, Financial Policies & Manual and applicable legal or insurance requirements.

19. Related Documents

Financial Policies & Manual
Insurance coverage arrangements
Health & Safety Policy
Event Planning & Management Policy
Sick Leave & Medical Absence Policy
Records Management Policy
Applicable employment agreements
Applicable legislation, including the Highway Traffic Act

20. Administration and Review

The Executive Director is responsible for day-to-day administration of this Policy within delegated authority. The Board may amend this Policy by resolution.

This Policy shall be reviewed at least every four (4) years and sooner where vehicle operations, insurance coverage or applicable requirements change.

DOBIA SIDEWALK USE POLICY

Authority	City of Orillia applicable sidewalk by-laws and requirements; Board-approved policy
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or sooner if municipal requirements or DOBIA's sidewalk-use role changes

1. Purpose

The purpose of this Policy is to establish requirements for the use and display of items associated with businesses on municipally owned sidewalks within the Downtown Orillia Business Improvement Area (DOBIA).

The objectives of the Policy are to maintain safe pedestrian movement and accessibility, support an attractive and orderly downtown streetscape, and ensure that sidewalk use does not interfere with municipal services, entrances, emergency access or other public uses.

2. Application

This Policy applies to businesses and other persons placing or displaying goods, merchandise, fixtures, tables, chairs, or similar items associated with a business on municipally owned sidewalks within the DOBIA area. This Policy does not replace any City of Orillia by-law, permit, licence or other municipal requirement. Where a municipal requirement applies, the municipal requirement prevails.

3. Accessibility and Pedestrian Navigation

Accessibility and safe pedestrian navigation are the primary considerations for sidewalk use. Sidewalk displays and other permitted items shall be positioned so that pedestrians, including persons using mobility devices, have a clear and reasonably unobstructed route.

Displays shall not create trip hazards, unreasonably narrow the pedestrian route, interfere with curb ramps, obstruct entrances or create other barriers to safe movement. Businesses shall ensure that displays do not interfere with emergency access, fire hydrants, municipal infrastructure, street operations or other required access.

Where a display creates an accessibility or safety concern, DOBIA may request that the business relocate, modify or remove it. Municipal authorities may also take action within their jurisdiction.

4. Streetscape and Appearance

Displays should be neat, well-maintained and complementary to the character and streetscape of Downtown Orillia. Items should enhance, rather than detract from, the appearance of the downtown and should not create unnecessary visual clutter. Businesses are responsible for maintaining their displays and the surrounding area in a clean and orderly condition.

5. Neighbouring Businesses
Businesses should consider the effect of sidewalk displays on neighbouring businesses and the shared use of the sidewalk, including sightlines, access to neighbouring storefronts, pedestrian circulation, loading activities and other impacts on adjacent businesses.

Where a proposed display has a material effect on a neighbouring business, DOBIA may seek to discuss the concern with the affected businesses and encourage a practical resolution.

6. Sidewalk Signs
Sidewalk signs are permitted and do not require a separate DOBIA application or permit. Businesses remain responsible for ensuring that any sidewalk sign complies with applicable municipal requirements and does not obstruct pedestrian movement, accessibility, entrances, emergency access or municipal operations.

7. Display Period
Sidewalk displays governed by this Policy may be placed or displayed annually from April 15 to November 15. Displays shall not remain on the sidewalk outside the permitted period unless another municipal authorization or specific Board-approved exception applies.

Businesses are responsible for removing displays promptly at the end of the permitted display period and whenever directed for safety, accessibility, maintenance or municipal requirements.

8. Events and Sales
A sidewalk display associated with a DOBIA-approved festival, event or sale may be subject to different timing or operating arrangements established for that event.

During a DOBIA-approved festival, event or sidewalk sale, temporary displays may be subject to event-specific timing or operating arrangements, provided they continue to meet applicable accessibility, safety and municipal requirements.

9. General Display Conditions

Displays shall remain under the control of the business responsible for them and shall be kept stable, secure, clean and in good condition.

DOBIA may request that an item be removed, relocated or modified where it creates a safety, accessibility, maintenance or streetscape concern.

10. Municipal Requirements
Businesses are responsible for confirming whether a City permit, licence, approval or other authorization is required for their proposed sidewalk use. DOBIA's role under this Policy does not replace the City's authority to regulate municipal sidewalks and public property.

11. Compliance
Where DOBIA becomes aware of sidewalk use that appears inconsistent with this Policy, it may communicate the concern to the business and request voluntary correction.

Where a matter falls within municipal regulatory authority, DOBIA may refer or communicate the matter to the appropriate City department. Nothing in this Policy authorizes DOBIA to enforce a municipal by-law or exercise powers that belong to the City.

12. Responsibilities
Businesses and Other Users:

a) comply with this Policy and applicable municipal requirements;
b) maintain safe and accessible pedestrian routes;
c) keep permitted displays clean, orderly and in good condition;
d) consider the effect of displays on neighbouring businesses;
e) remove, relocate or modify items when necessary to address safety, accessibility or municipal requirements; and
f) remove displays at the end of the permitted display period.

DOBIA:

a) communicate the Policy and applicable expectations;
b) identify concerns that fall within DOBIA's role;
c) work with businesses toward voluntary compliance; and
d) refer matters requiring municipal enforcement to the appropriate City authority.

13. Records
Records relating to significant sidewalk-use concerns or compliance correspondence may be maintained in accordance with DOBIA's Records Management Policy.

14. Related Documents
Accessibility Policy
Event Planning & Management Policy
Records Management Policy
Current City of Orillia sidewalk, sign and public-property by-laws and requirements

15. Administration and Review
The Executive Director is responsible for day-to-day administration of this Policy within delegated authority.

The Board may amend this Policy by resolution.

This Policy shall be reviewed at least every four (4) years and sooner where City requirements or DOBIA's role in sidewalk matters changes.

DOBIA RECORDS MANAGEMENT POLICY

Authority	Board-approved policy; applicable legislation; Governance Manual; Financial Policies & Manual
Approval	Approved by Board resolution
Effective Date	October 22, 2026
Review Cycle	Every four (4) years, or sooner if legislation, records systems or organizational requirements change

1. Purpose

The purpose of this Policy is to establish a consistent framework for the creation, collection, classification, storage, protection, retention, and disposition of records created or received by the Downtown Orillia Business Improvement Area (DOBIA).

DOBIA shall maintain records in a manner that supports accountability, transparency, continuity of operations, protection of information and compliance with applicable legal and financial requirements.

2. Scope

This Policy applies to records created, received or maintained by DOBIA in connection with its governance, operations, finances, employment, programs, events, committees, and other activities.

It applies to records in paper, electronic, photographic, audio, video, database, cloud, or other formats.

This Policy applies to Directors, employees, volunteers, committee members and other persons who create or maintain DOBIA records in the course of authorized activities.

3. Records

A record is information recorded in any medium that is created, received or maintained by DOBIA as evidence of its activities, decisions, transactions, responsibilities or operations. Records may include:

a) Board agendas, minutes, resolutions and governance records;
b) financial records, invoices, receipts, banking and audit records;
c) contracts, procurement records and approvals;
d) membership and stakeholder records;
e) employee and human resources records;
f) event applications, approvals, insurance and incident records;
g) correspondence and official communications;
h) policies, procedures, forms and controlled documents;
i) photographs, videos and other event or program records; and
j) other records required to document DOBIA's activities.

4. Recordkeeping Principles
DOBIA's recordkeeping practices shall support:

a) accuracy and completeness;
b) accessibility and retrievability;
c) appropriate confidentiality and privacy;
d) protection against unauthorized alteration, loss or destruction;
e) consistent retention and disposition; and
f) accountability for official decisions and transactions.

5. Creation and Capture of Records
Official DOBIA records shall be created and maintained when necessary to document decisions, approvals, transactions, obligations, significant communications or other activities that require an organizational record.

Directors, employees and others acting for DOBIA shall use approved DOBIA systems or storage locations for official records where reasonably practicable.

Important business information should not be maintained solely in personal email accounts, personal devices, personal cloud storage or informal messaging platforms when a DOBIA record is required.

6. Classification and Organization
Records shall be organized so that authorized users can reasonably locate and retrieve them. The Executive Director may establish practical naming conventions, folder structures, document categories and administrative procedures consistent with this Policy.

Controlled policies and governance documents shall be maintained in their current approved versions, with approval and effective dates identified. Superseded versions shall be retained or archived where required.

7. Security and Access
DOBIA shall protect records from unauthorized access, use, disclosure, alteration, loss and destruction. Access shall be based on role and legitimate business need.

Confidential or sensitive records, including employee, personal, financial, legal and complaint-related records, shall be subject to appropriate access controls. Records containing personal information shall be handled in accordance with applicable privacy requirements and any applicable contractual or statutory obligations.

Suspected loss, unauthorized access, disclosure, alteration or destruction of DOBIA records shall be reported promptly to the Executive Director or designate.

Where records are stored electronically, reasonable security measures should include appropriate passwords, access controls, backups, secure systems and timely removal of access when a person's authorized role ends.

8. Electronic Records and Communications
Electronic records have the same recordkeeping importance as paper records where they document DOBIA business.

Official email communications, electronic approvals, digital contracts, shared files, databases and other electronic information shall be retained where necessary to document DOBIA's activities.

Text messages, instant messages and other informal communications shall be retained when they contain information that is necessary to document an official decision, direction, commitment or transaction.

9. Board and Governance Records
Official Board records shall include, as applicable, agendas, meeting packages, minutes, resolutions, approved policies, committee recommendations and other records necessary to document Board business.

Final approved versions of governance documents shall be maintained as controlled records.

Drafts may be retained where required to document the development of a significant decision or policy, but routine working drafts do not need to be retained indefinitely.

10. Financial and Procurement Records
Financial and procurement records shall be maintained in accordance with the Financial Policies & Manual and applicable legal, tax, audit and funding requirements.

Where another DOBIA policy establishes a specific financial or procurement recordkeeping requirement, that requirement applies in addition to this Policy.

11. Employee and Confidential Records
Employee records shall be maintained securely and separately from general operational records where appropriate.

Medical, accommodation, complaint, investigation and other highly confidential employee information shall have restricted access.

Directors, employees and volunteers shall maintain the confidentiality of information that is not publicly available and shall not use records for personal benefit or unauthorized purposes.

12. Retention
Records shall be retained for the period necessary to meet legal, financial, operational, contractual, insurance, audit and historical requirements.

Retention periods for major categories of records are established in Appendix A — Records Retention Schedule.

Where a specific legal, contractual or funding requirement establishes a longer retention period, that requirement prevails.

Records subject to an active legal matter, audit, investigation, complaint or other hold shall not be destroyed until the hold has been released.

13. Disposition and Destruction
Records may be securely destroyed or otherwise disposed of when their approved retention period has expired and there is no legal, audit, investigation or other requirement to retain them. Disposition shall be carried out in a manner appropriate to the sensitivity and format of the record.

a) Confidential paper records should be securely shredded or otherwise destroyed.
b) Electronic records should be securely deleted or disposed of in accordance with the system's security requirements.
c) Physical media containing sensitive information should be securely erased or destroyed where appropriate.

Destruction of confidential, financial, personnel, legal, complaint, investigation or other sensitive records shall be authorized by the Executive Director or designate and documented where appropriate.

14. Archival and Historical Records
Records with continuing historical, legal or governance value may be designated for permanent or long-term preservation.

The 2019 Policy Manual, for example, may be retained as a superseded historical record after the new policy framework is formally adopted and the 2019 manual is repealed/superseded.

Historical records shall be clearly identified as superseded or archival so that they are not mistaken for current policy.

15. Business Continuity and Backup
DOBIA shall take reasonable measures to protect critical records against loss arising from equipment failure, cyber incidents, accidental deletion, disaster or other interruption.

Critical electronic records should be backed up using appropriate systems and access controls. The Executive Director may establish backup, recovery and business-continuity procedures as operational requirements evolve.

16. Information Requests and Disclosure

DOBIA shall respond to requests for access to or disclosure of records in accordance with applicable law, contractual obligations and Board policy.

Records shall not be released when disclosure is prohibited or restricted by law, confidentiality obligations, privacy requirements or legal privilege, except as authorized. Where a request concerns records belonging to or controlled by another authority, DOBIA shall direct the requester to the appropriate authority where appropriate.

17. Records Held by Third Parties

Where DOBIA's records are stored, processed or maintained by a bookkeeper, accountant, payroll provider, cloud service, consultant, contractor or other third party, DOBIA remains responsible for ensuring that appropriate records are retained, protected and accessible for authorized purposes.

Contracts with third-party service providers should address ownership, access, confidentiality, security, retention and return of DOBIA records where appropriate.

18. Responsibilities

Board:

a) approve this Policy and significant amendments;
b) provide oversight of records governance; and
c) ensure records necessary to demonstrate Board decisions and accountability are maintained.

Executive Director:

a) administer this Policy and establish practical procedures;
b) ensure appropriate recordkeeping systems are maintained;
c) manage access to confidential records;
d) coordinate retention and secure disposition;
e) ensure significant records can be retrieved when required; and
f) address records -manage risks and report significant issues to the Board.

Directors, Employees, Volunteers and Committee Members:

a) create and retain records required to document authorized DOBIA activities;
b) store official records in approved locations where reasonably practicable;
c) protect confidential and personal information;
d) avoid unauthorized alteration, deletion or disclosure of records; and
e) cooperate with records retention and disposition requirements.

19. Records Retention Schedule and Administrative Procedures
Appendix A establishes the records retention schedule. The Executive Director may maintain administrative procedures identifying record categories, responsible custodians, disposition methods and other operational details consistent with this Policy and Appendix A.

Administrative procedures, forms and schedules developed under this Policy do not require separate Board approval unless the Board determines otherwise or the procedure changes a substantive policy requirement.

20. Policy Review
This Policy shall be reviewed at least every four (4) years and sooner where there are significant changes to legislation, technology, organizational structure, records systems or operational requirements.

The Executive Director may recommend amendments to the Board. The Board is responsible for approving amendments requiring Board approval.

21. Related Documents
Governance Manual
Financial Policies & Manual
Employee & Human Resources Handbook
Sick Leave & Medical Absence Policy
Workplace Anti-Violence & Anti-Harassment Policy
Conflict of Interest Policy
Event Planning & Management Policy
Vehicle & Fleet Use Policy
Accessibility Policy

22. Applicable Requirements
This Policy shall be administered in accordance with applicable legislation, contractual obligations, privacy requirements, audit and financial requirements, and any other legal requirements applicable to DOBIA's records.

Where a legal or contractual requirement differs from this Policy, the applicable legal or contractual requirement prevails.

APPENDIX A — RECORDS RETENTION SCHEDULE

1. Purpose

This Schedule establishes recommended retention periods for major categories of DOBIA records. It is intended to support consistent retention and secure disposition while allowing DOBIA to meet legal, financial, operational, contractual, audit, insurance and historical requirements.

Where a statute, regulation, contract, grant condition, insurance requirement, legal hold or other binding requirement requires a longer retention period, the longer period applies.

2. How to Use This Schedule

The retention period begins at the event or date identified in the Trigger column.

Records subject to a legal matter, audit, investigation, complaint, claim, access request or other hold must not be destroyed until the hold is released. Where a record belongs in more than one category, the longer applicable retention period should be used.

Permanent records are not routinely destroyed and should be preserved as archival records. Secure disposition should be documented where appropriate, particularly for confidential, financial, personnel, complaint or legal records.

3. Records Retention Schedule

Record Category	*Examples*	*Retention Period*	*Trigger*	*Disposition / Notes*	*Custodian*
Board & Governance	Minutes; resolutions; agendas and approved packages; bylaws; governance policies; Board decisions	Permanent	Creation / approval	Preserve as permanent organizational record.	Executive Director / Board records custodian
Corporate & Legal	Establishing documents; legal opinions; material corporate agreements; property or ownership records	Permanent	Creation / expiry	Preserve records with continuing legal or historical value.	Executive Director
Annual Budgets & Financial Statements	Approved annual budgets; final financial statements; annual financial reports	Permanent	Fiscal year end / approval	Preserve final approved versions; drafts not permanent unless for a significant decision.	Executive Director / Treasurer
General Accounting & Tax	General ledger; invoices; receipts; banking records;	6 years min.	End of applicable fiscal/tax year	Use the longer period where CRA, funding, audit or	Bookkeeper / Executive Director

	GST/HST records; tax filings and supporting documents			legal requirements apply.	
Payroll	Payroll registers; T4/T4A information; vacation and statutory-leave records; payroll remittances; supporting payroll records	7 years recommended	End of employment year / applicable payroll year	Retain longer where required by law, CRA, benefits or an active matter.	Payroll provider / Executive Director
Employee Personnel Files	Employment agreements; performance records; discipline; training; leave administration	7 years after termination	Date employment ends	Restrict access; retain longer where legal, benefits or other obligations require.	Executive Director
Medical & Accommodation	Worker assessments; accommodation plans; return-to-work records; medical functional info.	7 years after termination	Date employment ends	Store separately with restricted access; do not retain unnecessary medical information.	Executive Director
Recruitment — Unsuccessful Candidates	Applications; resumes; interview notes; screening records	2 years	End of recruitment process	Retain longer only where needed for a complaint, legal matter or business reason.	Executive Director
Contracts & Agreements	Supplier contracts; service agreements; leases; sponsorship agreements; major partnership agreements	7 years after expiry/termination	Contract expiry or termination	Retain longer if contract, limitation period, claim or asset relationship requires.	Executive Director
Procurement	Quotes; bids; evaluation records; approvals; purchase records for significant procurements	7 years after completion	Completion of procurement / contract	Financial records may require longer retention.	Executive Director / Bookkeeper
Insurance	Policies; certificates; endorsements; renewals; broker correspondence; claims	7 years after expiry; claims 7 years after closure	Policy expiry / claim closure	Retain open claims until fully resolved and any applicable hold is released.	Executive Director
Events	Applications; approvals; budgets; funding decisions; permits; insurance; vendor records; evaluations; debriefs	7 years	Event completion / file closure	Use longer period for incidents, claims, grants or contracts where required.	Executive Director / Event lead
Event Incidents & Accidents	Incident reports; photographs; witness information; emergency records; related correspondence	7 years after resolution	Incident closure	Retain longer while any claim, investigation or legal matter remains open.	Executive Director

Membership & Member Administration	Membership records; eligibility information; member communications; annual membership administration	Current + 6 years	End of membership year	Retain only information needed for legitimate business purposes and subject to privacy requirements.	Executive Director
Complaints & Investigations	Formal complaints; investigation records; findings; correspondence; corrective action	7 years after closure	Matter closed	Restricted access; retain longer if litigation, human rights, insurance or other matter remains active.	Executive Director / designated investigator
Conflict of Interest	Declarations; disclosures; recusal records; related Board decisions	7 years after matter closes	Matter closure / end of term	Records connected to permanent governance decisions should be retained with the relevant Board record.	Executive Director
Policies & Controlled Documents	Current policies; superseded policies; approval and revision history	Current + permanent archive of superseded versions	Replacement / supersession	Maintain current controlled version; archive superseded versions as historical records.	Executive Director
Routine Correspondence	Routine email; administrative correspondence; scheduling and ordinary operational communications	2–3 years	End of relevant business matter	Do not retain indefinitely when no continuing business, legal or historical value exists.	Person responsible for record
Official Electronic Communications	Emails, texts or messages documenting an official decision, direction, approval, commitment or transaction	Same as related record category	End of related matter	Move/capture into approved DOBIA recordkeeping system where practical.	Person responsible / Executive Director
Marketing & Publications	Annual reports; significant public communications; major campaign materials; event photographs of historical value	Permanent for significant historical records; otherwise 3 years	Publication / end of campaign	Use judgment based on historical, reputational and archival value.	Executive Director
Operational Records	Routine schedules; work orders; checklists; non-material administrative records	3 years	Completion of activity	Destroy when no longer required for operational, legal	Relevant staff

				or financial purposes.	
Vehicle & Fleet	Driver authorization; inspections; maintenance; repairs; fuel records; collision records	7 years after vehicle disposal / incident closure	Vehicle disposal / incident closure	Collision/claim records follow the longer claims or legal requirement.	Executive Director
Accessibility	Accessibility feedback; accommodation/service records; training records; accessibility reviews	7 years or longer if legally required	Closure / end of reporting period	Restrict personal information; retain permanent policy versions.	Executive Director
Training	Training records, including accessibility, health & safety and required employee training	7 years after training / employment termination, as applicable	Training date / termination	Use longer period where legislation or insurer requires.	Executive Director
Volunteer Records	Volunteer agreements; screening; training; event participation records	7 years after end of service	End of volunteer service	Retain incident-related records longer if required.	Executive Director

4. Exceptions and Holds

A record must not be destroyed when DOBIA is aware that it may be relevant to a pending or reasonably anticipated legal proceeding, audit, investigation, insurance claim, complaint, access request or other matter requiring preservation. The Executive Director shall communicate any applicable hold and release it when the matter is concluded.

5. Review and Maintenance

The Executive Director should review this Schedule periodically and whenever applicable legislation, contractual obligations, insurance requirements, technology or DOBIA operations change. The Executive Director may make administrative updates that do not change a substantive policy requirement; material changes to retention principles shall be brought to the Board.

This Schedule is subordinate to applicable law and the DOBIA Records Management Policy.