

## Attachment 2 - Summary of Changes

The following sets out the changes between the new Members of Council Operations Policy and the existing Constituency Services and Office Budget Policy.

Section 1 – Policy Overview			
Change #	New Section Title	Old Section Title	Change
1	1 – Policy Overview	1 – Glossary	<ul style="list-style-type: none"> <li>Delete the Glossary and replace with a Policy Overview section that consists of parts of Section 4 of the Old CSOB as set out below.</li> </ul>
2	1.1 Purpose	4.1 – Purpose	<ul style="list-style-type: none"> <li>Minor changes related to changing the reference from “Council Members” to “Members” throughout section 1.1.</li> <li>Also revised " The budget allows Council members to:" to "The budgets and other resources described in this policy allow Members to:"</li> <li>Added “not” to personal in nature to clarify the point.</li> <li>Updated title of Deputy City Clerk</li> </ul>
3	1.2 Scope	4.2 – Scope	<ul style="list-style-type: none"> <li>Lead in sentence revised. Previously: The policy sets out the rules that apply to how transactions are to be conducted when Council members use their discretionary Constituency Services and Office Budget. The policy does not apply to expenses funded by City programs, agencies and corporations.</li> </ul> <p>New: The policy applies to all Members and sets out the rules that apply when they use their Constituency Services and Office Budget or the Mayor's Annual Operating Budget and access funds in other available budgets. Any exceptions to the Mayor's Office will be set out in the specific section of the policy. This policy does not apply to expenses funded by City programs, agencies and corporations.</p>

			<ul style="list-style-type: none"> <li>Deleted former 4.2.1 – Application to the Mayor's Office, as captured by sentence indicating any exceptions will be noted in the specific section of the policy</li> </ul>
4	1.3 Principles	4.3 Principles	<ul style="list-style-type: none"> <li>Minor changes of Council members to Members where appropriate</li> </ul>
5	1.4 Guiding Legislation, By-laws and Policies	3 – Guiding Legislation and By-laws & Appendix 2 – Legislation Guiding Councillor Expenses and Excerpts from Code of Conduct Relevant to the Constituency Services and Office Budget Policy	<ul style="list-style-type: none"> <li>Added 'Policies' to title</li> <li>Added an opening sentence</li> <li>Deleted City of Toronto Act excerpt</li> <li>Added list of legislation, codes, etc. from Appendix 2 and replaced no-longer-existing fraud policy with Human Resource Management &amp; Ethical Framework</li> <li>Deleted reference to Code of Conduct Complaint Protocol for Members of Council as it has been replaced.</li> <li>Deleted Appendix 2</li> <li>Code of Conduct and Lobbying By-law section: <ul style="list-style-type: none"> <li>Updated reference to the MCOP</li> <li>Added links and updated references</li> <li>Updated Council Members to Members</li> <li>Deleted bullet: “The role of the Councillor or Mayor as a Member of Council and their role as an individual and a business operative must be kept separate and distinct”</li> </ul> </li> <li>Municipal Election Act section: <ul style="list-style-type: none"> <li>Added links and updated references</li> </ul> </li> </ul>
6	1.5 Disclosure	4.9 - Disclosure	<ul style="list-style-type: none"> <li>Deleted the first bullet regarding routine disclosure as its reference was unclear.</li> <li>Rephrased the City Clerk will publish to the City Clerk will routinely disclose.</li> </ul>

			<ul style="list-style-type: none"> <li>Minor grammatical changes to simplify the section</li> </ul>
7	1.6 Future Policy Updates	4.10 – Future Policy Updates	<ul style="list-style-type: none"> <li>Added "The City Clerk is responsible for updating the policy to incorporate routine changes such as those required by changes to related policies and standards, hyperlinks, and organizational names and titles."</li> </ul>
<b>Section 2 Available Budgets</b>			
Change #	New Section Title	Old Section Title	Recommended Change
8	<p>Section 2 – Available Budgets</p> <p>Section 2.1 – Council General Expense Budget</p> <p>Section 2.2 – Council Business Travel Budget</p>	<p>Section 2 – Introduction</p> <p>Section 2.1 – Council General Expense Budget</p> <p>Section 2.2 – Council Business Travel Budget</p>	<ul style="list-style-type: none"> <li>Renamed section, previously Introduction section.</li> <li>Added sentence that refers to Section 8 (centralized resources) so it doesn't have to be repeated under each budget listed</li> </ul>
9	Section 2.3 – Constituency Services and Office Budget (CSOB)	Section 2.4 – Constituency Services and Office Budget	<ul style="list-style-type: none"> <li>Moved section from 2.4 to 2.3</li> <li>Simplified the section</li> <li>Clarified the CPI adjustment by removing the reference to the Chief Financial Officer.</li> <li>Removed reference to accepting donations as captured later.</li> <li>Removed reference to informing the Integrity Commissioner of a Member exceeding the CSOB.</li> </ul>
10	Section 2.4 – Councillor Staffing Budget	Section 2.3 – Councillor Staffing Budget	<ul style="list-style-type: none"> <li>Moved section from 2.3 to 2.4</li> <li>Simplified the section by removing reference to three staff as no longer applicable.</li> </ul>
11	Section 2.5 – Mayor's Office Annual Operating Budget	N/A	<ul style="list-style-type: none"> <li>Added Mayor's Office Annual Operating Budget for consistency of budgets referenced in the Policy.</li> </ul>
12	Section 2.6 – Program Budgets	Section 2.5 – Program Budget	<ul style="list-style-type: none"> <li>Moved section from 2.5 to 2.6</li> <li>Minor changes to clarify the section.</li> </ul>
<b>Section 3 Roles and Responsibilities</b>			
Change #	New Section Title	Old Section Title	Recommended Change

13	3.1. Council Members	Section 4.5a	<ul style="list-style-type: none"> <li>• Changed "Authorize expenditures from the Constituency Services and Office Budget or Staffing Budget' to "Authorize expenditures <b>from their budgets</b>"</li> <li>• Added "Ensure all equipment provided by the City or purchased with City funds are returned to the City when the Member ceases to be a Member, except as otherwise indicated in this policy."</li> <li>• Changed "Comply with purchasing, accounting and financial <b>policies</b> approved for Council members." to "Comply with purchasing, accounting financial <b>processes as outlined in this policy. See Section 5, Purchasing, Accounting and Payment Procedures for details.</b>"</li> <li>• Added from former section 4.8 Review Process: <ul style="list-style-type: none"> <li>○ Consult with the Integrity Commissioner for guidance with respect to individual Council member expenses or any interpretation on the application of this policy</li> </ul> </li> </ul>
14	3.2. City Clerk's Office	Section 4.5b	<p>Added from former section 4.8 Review Process:</p> <ul style="list-style-type: none"> <li>• The City Clerk has ultimate responsibility and authority for the administration of Member expenses and the MCOP Policy.</li> <li>• The City Clerk's Office may consult with the Integrity Commissioner for guidance with respect to individual Member expenses or any interpretation on the application of this policy. The Integrity Commissioner may also consult with the City Clerk or the Deputy City Clerk on the interpretation on the application of the policy.</li> </ul> <p>Edited the following bullets:</p>

			<ul style="list-style-type: none"> <li>• "Provide purchasing support to Council members with <del>vendor lists</del>, obtaining quotations, issuing purchasing documents and developing formal agreements."</li> <li>• "Monitor changes in City policies and procedures and review relevance of these changes for the <del>Constituency Services and Office Budget Policy</del> <b>Member budgets</b> and related procedures."</li> <li>• "Provide training and orientation <b>about budgets and office operations for Members</b> and their staff at the beginning of each term and when required or as requested during the term from time to time."</li> </ul> <p>Added a new bullet:</p> <ul style="list-style-type: none"> <li>• Review all expenses submitted by Members to determine that proper documentation is in place and the expenditure is in compliance with the MCOP.</li> </ul>
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**Section 4 Using personal funds, furniture and equipment**

Change #	New Section Title	Old Section Title	Recommended Change
15	Section 4 - Using personal funds, furniture and equipment	Section 4.6	<ul style="list-style-type: none"> <li>• Minor changes including changing "Council members" to "Members" and update Deputy City Clerk title</li> <li>• Added bullet and associated subbullets from old section 4.4b to ensure same topic of use of personal funds are found in the same section: <ul style="list-style-type: none"> <li>○ Members may from time to time receive reimbursement or arrange payment of expenses from their budget and wish to use personal funds for these expenses instead. Members can reimburse the City for these expenses...</li> </ul> </li> </ul>

Section 5 Purchasing, Accounting and Payment Processes			
Change #	New Section Title	Old Section Title	Recommended Change
16	5.1 Purchasing Process	Section 4.4a	<ul style="list-style-type: none"> <li>• Revised opening paragraph to remove "assist with vendor lists and obtaining quotes".</li> <li>• Removed the table of procurement levels and used bullet points</li> <li>• Removed reference to the IT Purchase form and noted it as the form as identified by the City Clerk's Office for IT purchases</li> <li>• Added "Items purchased with City funds is considered City property and must be returned to the City at the end of the term or earlier if the Council member leaves office, except as otherwise indicated in this policy."</li> </ul>
17	5.2 Accounting Process	Section 4.4b	<ul style="list-style-type: none"> <li>• Removed " When providing supporting documentation for justifying business expenses related to kilometrage, parking and taxi rides, Council members need to provide the specific details about these expenses as outlined in Section 5 – Transportation – Kilometrage and Parking and Transportation – Taxi." as it is covered in the specific expense heading</li> <li>• Simplified the bullets around delegating signing authority and the need for signatures.</li> <li>• Simplified " Council members or their authorized staff must sign off all receipts or invoices with original signatures. Documentation with signature stamps or electronic signatures will not be accepted" by removing last sentence.</li> <li>• Removed as not required: <ul style="list-style-type: none"> <li>○ The City of Toronto can claim 100% of GST, and 78% of the 8% Ontario</li> </ul> </li> </ul>

			<p>part of HST. The total tax rebate is equal to 11.24% of the 13% HST. The nonrefundable portion of 1.76% of the HST will be included in the amount charged to the Constituency Services and Office Budgets.</p> <ul style="list-style-type: none"> <li>• Removed as set out elsewhere <ul style="list-style-type: none"> <li>○ Summaries of expenses paid and budget remaining in the individual Council members' Constituency Services and Office Budget are provided to Councillors in real-time through the Members' Expense Dashboard. If there are any discrepancies or disagreement, Council members must advise the Deputy City Clerk, Strategic Integration and Excellence immediately.</li> </ul> </li> <li>• Moved this bullet and its subbullet to Section 4 – Use of Personal Funds, Furniture and equipment: <ul style="list-style-type: none"> <li>○ Council members may from time to time receive reimbursement or arrange payment of expenses from their Constituency Services and Office Budget and wish to use personal funds for these expenses instead. Council members can reimburse the City for these expenses</li> </ul> </li> <li>• Removed the following bullet and subbullets: <ul style="list-style-type: none"> <li>○ In cases where there is a vendor discount credit or a refund that is received</li> </ul> </li> </ul>
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			by the City, the funds will be:...
18	5.3 Payment and Reimbursement Process	Section 4.4c	<ul style="list-style-type: none"> <li>• Simplified the entire section by: <ul style="list-style-type: none"> <li>○ Removed all the bullets identifying specific forms and indicated instead to use the appropriate form as provided by City Clerk's Office.</li> <li>○ Removed bullet on petty cash as that is no longer a corporate option</li> <li>○ Removed the link from bullet on Pcards.</li> </ul> </li> </ul>
<b>Section 6 - Member Expenses and Elections</b>			
Change #	New Section Title	Old Section Title	Recommended Change
19	6 – Member Expenses and Elections	Former section 4.7	<ul style="list-style-type: none"> <li>• Updated links</li> <li>• Replaced Council Member with Member and ensured references applied to both Councillor and Mayor budgets</li> <li>• Incorporated as subsection 6.1 – Mayoral By-election - the direction from City Council respecting the Mayoral by-election and restrictions that can apply in that situation.</li> </ul>
<b>Section 7 – Allowable Expenses</b>			
Change #	New Section Title	Old Section Title	Recommended Change
20	Section 7 – Allowable Expenses	Section 5 – Allowable Expenses	<p>Changed the first paragraph:</p> <p>"This section outlines allowable expenses that can be charged to the Council member's Constituency Services and Office Budget. It outlines the details for each type of expense, documentation requirements, and approved forms to be used."</p> <p>To...</p> <p>"This section outlines allowable expenses that can be charged to the Member's CSOB or Mayor's Office Annual Operating Budget. It outlines the details for each type of expense including any conditions and</p>

			<p>documentation required. Where applicable it also refers to resources available to Members in Section 8. Forms to submit the expenses will be provided by the City Clerk's Office.</p> <p>Changed the last paragraph:</p> <p>"Council members or their authorized staff must sign off all receipts or invoices with original signatures (signature stamps and electronic signatures will not be accepted)."</p> <p>To:</p> <p>"Members or their authorized staff must approve all receipts or invoices. Approval may be indicated with original or electronic signature or email."</p>
21	Advertising and Promotions	Advertising and Promotions	<p>Minor changes</p> <ul style="list-style-type: none"> <li>• Added social media as part of the first bullet</li> <li>• Changed Subheading "other info" to "conditions"</li> <li>• Removed reference to Deputy City Clerk arranging payment directly to the media organization</li> <li>• Removed reference to the Form</li> </ul>
22	Business Hospitality Expenses	Business Hospitality Expenses	<p>Minor changes</p> <ul style="list-style-type: none"> <li>• Reordered the eligible expenses by moving Facility rental down, and combining alcohol into the main bullet on food and beverages</li> <li>• Added an ineligible expense - "Goodbye or celebration events for Members of staff" to be consistent with entry on Community Events</li> <li>• Combined <i>Other information about business hospitality expenses</i> into <i>Conditions</i> and simplified to remove redundancy.</li> <li>• Removed reference to the Form</li> </ul>
23	Business Meetings and Meal Expense	Business Meal Allowance & Business Meeting Expense	<ul style="list-style-type: none"> <li>• Combined Business Meal Allowance Category with Business Meeting Expense Category</li> <li>• Removed the \$500 meal allowance cap</li> </ul>

			<ul style="list-style-type: none"> <li>• Added an ineligible expense - "Goodbye or celebration events for Members of staff" to be consistent with entry on Community Events</li> <li>• Removed reference to the Form</li> </ul>
24	Community Expense –Event Tickets	Community Expense – Event Tickets	<ul style="list-style-type: none"> <li>• Combined two eligible expense bullets into one bullet</li> <li>• Removed bullet in Conditions about Councillor staff can attend staff events with the Councillor or on their own by making the eligible bullet be clear that the tickets are for the Member and/or staff.</li> <li>• In Other information, deleted excerpt from Code of Conduct but added hyperlink</li> <li>• Removed reference to the Form</li> </ul>
25	Community Expense - Events Organized (Entirely or in Part) by a Member	Community Expense – Events	<ul style="list-style-type: none"> <li>• Clarified the title of the Category</li> <li>• Added to Eligible expense "Draws or door prizes for the event"</li> <li>• In Ineligible expense, simplified "Events, the primary purpose of which is a farewell, or a celebration of the Councillor's term or year or to celebrate a milestone occasion are not permitted" by changing to: "Goodbye or Celebration events for Members or staff."</li> <li>• Added to Conditions "Members must provide an original detailed invoice from the vendor, including the nature of service, date and venue of event"</li> <li>• Moved a number of bullets related to donations from Conditions to Other Information</li> <li>• Removed reference to specific donation level and instead referred to current policy</li> <li>• Removed reference to the Form</li> </ul>
26	Community Expense – Gifts and Promotions	Community Expense – Gifts and Promotions	<ul style="list-style-type: none"> <li>• Updated information on source of promotional items (from SPER to City Stores)</li> <li>• Clarified refreshments for community events that is not co-organized with the Member to indicate the attendance of the Member or the Member's staff</li> </ul>

			<ul style="list-style-type: none"> <li>• Added to ineligible expense “Donations to community groups, individuals, groups of individuals or trust funds.” To be consistent with Council direction and the Community Expense – Payment in Lieu for Use of Space category.</li> <li>• Simplified Other information in relation to SPER</li> <li>• Removed reference to the Form</li> </ul>
27	Community Expense – Payment in Lieu for Use of Space	Community Expense – Payment in Lieu for Use of Space	<ul style="list-style-type: none"> <li>• Removed reference to the Form</li> </ul>
28	Computer Hardware, Software and Accessories	Computer Hardware, Software and Accessories	<ul style="list-style-type: none"> <li>• Modified the eligible expense to indicate that computer hardware and software is above what is provided under section 8.4</li> <li>• Added fees for cloud-based programs that do not connect to City systems as an eligible expense</li> <li>• Simplified bullets around encrypted USB keys in both eligible and ineligible expenses.</li> <li>• Clarified the requirement to ensure hardware and software that connect to the City’s network must comply with Corporate standards</li> <li>• Replaced a "must" to "should" in the second and third bullet of Conditions.</li> <li>• Deleted Other information bullets as related to process of payments or otherwise captured under Section 8.4.</li> <li>• Removed reference to the Form</li> </ul>
29	Internet Services	Internet Services	<ul style="list-style-type: none"> <li>• Added opening sentence to refer to section 8 and removed section "Provided from City's Centralized Resources"</li> <li>• Combined first two bullets of eligible expenses</li> <li>• Removed “fees for access to for fee sites” from ineligible expenses</li> <li>• Removed reference to the Form</li> </ul>

30	Mail and Courier Services	Postage and Courier Services	<ul style="list-style-type: none"> <li>• Renamed Conditions to “more information about mail and courier services” and under that heading: <ul style="list-style-type: none"> <li>○ deleted bullet regarding direct purchase of stamps and courier services should only be done when mailroom service cannot meet requirements</li> <li>○ Updated how mail is processed</li> </ul> </li> <li>• Removed reference to the Form</li> </ul>
31	Memberships	Memberships	<ul style="list-style-type: none"> <li>• Simplified the first bullet</li> <li>• Added as an eligible expense "Association membership fees to directors' organizations"</li> <li>• Moved the first bullet from "Other Information about membership" and put it under a Condition heading</li> </ul>
32	Newsletters and Flyers	Newsletters and Flyers	<ul style="list-style-type: none"> <li>• Added opening sentence that refers to the newsletter allotment set out in section 8.5e and deleted section on provided from the City’s Centralized Resources</li> <li>• Added online services to eligible expense around distribution</li> <li>• Rearrangement of bullets under Conditions and Other Information</li> <li>• Deletion of reference to IDCs</li> <li>• Removed reference to the Form</li> </ul>
33	Newspapers, Magazines and Books	"Books and Magazines" and "Newspaper and Magazine Subscriptions"	<ul style="list-style-type: none"> <li>• Combined the “Books and Magazines” Category and the “Newspaper and Magazine Subscriptions” Category</li> <li>• Added reference to print and electronic formats of books, newspapers and magazines as an eligible expense</li> <li>• Clarified conditions.</li> <li>• Removed reference to the Form</li> </ul>
34	Office Decorations	Office Decorations	<ul style="list-style-type: none"> <li>• Added to eligible expenses - photos to types of framing allowed</li> <li>• Added to ineligible expenses - fine art framing</li> <li>• Moved details about loaned artwork from the City to section</li> </ul>

			<p>8.1a and added reference to section 8.1a</p> <ul style="list-style-type: none"> <li>• Removed reference to the Form</li> </ul>
35	Office Equipment: Non-Computer	Office Equipment	<ul style="list-style-type: none"> <li>• Added 'non-computer' to heading</li> <li>• Revised first bullet from "Expenses related to the operation of the office only, including but not limited to fax machines, shredders, telephone headsets, maintenance contracts for equipment and peripherals for equipment," to "Expenses related to the operation of the office including maintenance and warranties related to the items."</li> <li>• Revised second bullet to remove examples of equipment for community events.</li> <li>• Deleted reference to central serveries (covered in section 8) and equipment such as cameras for loan from the City Clerk's Office as they are no longer available.</li> <li>• Deleted reference to signing off on an annual inventory as a separate process from the expense</li> <li>• Removed reference to the Form</li> </ul>
36	Office Furniture	Office Furniture	<ul style="list-style-type: none"> <li>• Started the section with reference to what is provided under the Council General Expense Budget and referred to section 8.1a and removed it from later in the section.</li> <li>• Added one chair and desk for Member office, one chair for staff home offices as eligible expenses as previously the eligible expense was captured in the ineligible expense bullet (Furniture for Home Office other than one desk and one chair)</li> <li>• Clarified that Members can buy as an eligible expense additional furniture for their city hall or constituency office beyond what is provided from the centralized resources.</li> <li>• Removed from eligible expenses "costs for refurbishing or repairing furniture"</li> </ul>

			<ul style="list-style-type: none"> <li>• Added to ineligible expenses insurance for personal furniture</li> <li>• Removed bullet from Conditions <ul style="list-style-type: none"> <li>○ Councillors are responsible for verifying that all furniture is received in good condition and advise the Deputy City Clerk, Strategic Integration and Excellence on the receipt of the furniture</li> </ul> </li> <li>• Updated reference to Furniture Standard to refer to section 8</li> <li>• Simplified other bullets around trading.</li> <li>• Removed reference to the Form</li> </ul>
37	Office Space: Constituency Office	"Constituency Office Expenses – City-owned and agency owned Space" and "Constituency Office Expenses – Non-City-owned or non-agency owned Space"	<ul style="list-style-type: none"> <li>• Combined "Constituency Office Expenses – City-owned and agency owned Space" and "Constituency Office Expenses – Non-City-owned or non-agency owned Space"</li> <li>• Added opening sentence and references to what is provided from central resources in section 8.1 and deleted the section "Provided from centralized resources"</li> <li>• Combined eligible expenses and ineligible expenses to match existing policy</li> <li>• Clarified existing Conditions and other information.</li> </ul>
38	Office Space: Home Office	Home Office	<ul style="list-style-type: none"> <li>• Rephrased bullet regarding internet</li> <li>• Added to Eligible Expenses: "home security expenses only as set out in section 8.2"</li> <li>• Combined two bullets in ineligible expenses – furniture and decorations</li> <li>• Simplified the bullets in conditions to combine into one bullet</li> <li>• Simplified bullets in other information related to logs for CRA</li> </ul>
39	Office Supplies	Office Supplies	<ul style="list-style-type: none"> <li>• Added opening sentence that references what is supplied from section 8 and deleted Provided from City centralized resource section.</li> </ul>

			<ul style="list-style-type: none"> <li>• Combined first and second bullet in eligible expenses</li> <li>• Combined first and second bullet under Conditions and put it under Other Information. Deleted third bullet under conditions</li> <li>• Deleted bullet regarding Accounting Services under Other information</li> <li>• Removed reference to the Form</li> </ul>
40	Photographic Supplies and Services	Photographic Supplies and Services	<ul style="list-style-type: none"> <li>• Moved statement about portrait session, and receiving one framed official term photo and digital copies to the top</li> <li>• Deleted overtime for city photographer/videographer as an eligible expense</li> <li>• Removed "if the City's photographer is not available" from the bullet about professional photo fees</li> <li>• Removed ineligible expenses</li> <li>• Simplified the conditions</li> <li>• Removed reference to the form</li> </ul>
41	Printing and Photocopying Services	"Colour Printer Output", "Photocopying" and "Printing Services"	<ul style="list-style-type: none"> <li>• Combined "Colour Printer Output", "Photocopying" and "Printing Services"</li> <li>• Added as eligible expense "Printing costs from the City Clerk's Office Information Production Unit"</li> <li>• Added use of City of Toronto crest requires Protocol approval</li> <li>• Moved reference to using City Clerk's IP unit to Other information</li> </ul>
42	Professional, Contracted and Consulting Services	"Consulting Services" and "Professional and Contracted Services"	<ul style="list-style-type: none"> <li>• Combined "Consulting Services" category and "Professional and Contracted Services" category into one category</li> <li>• In Conditions : <ul style="list-style-type: none"> <li>○ removed reference to blanket contracts and information about HST</li> <li>○ simplified invoice requirements as may not be hourly rates</li> </ul> </li> </ul>
43	Salary – Staff Overage	Salary – Staff Overage	<ul style="list-style-type: none"> <li>• Moved the Conditions to the opening sentence</li> </ul>

44	Telephone	Telephone/Fax	<ul style="list-style-type: none"> <li>• Deleted Fax from the heading and Fax machine from eligible expenses</li> <li>• Combined two bullets under eligible expense regarding monthly fees</li> <li>• Deleted 411 calls from eligible expense</li> <li>• Added reference to Section 8 for info on city-supplied equipment and deleted the section on “Provided from the City’s Centralized resources”</li> <li>• Clarified the eligible expense that a home office line is for a member’s home office</li> <li>• Deleted reference to specific number of lines (8) provided</li> <li>• Deleted reference to Unified Communications Infrastructure and made it more generic</li> <li>• Added condition that requests for lines must go through City Clerks Office</li> <li>• Simplified conditions</li> </ul>
45	Television Service	Cable Television	<ul style="list-style-type: none"> <li>• Changed heading</li> <li>• Revised the wording of the existing bullets under eligible expenses to combine into one bullet</li> <li>• Added "Subscription costs for streaming news channels" as an eligible expense</li> <li>• Revised the wording of the existing ineligible expenses bullets to combine into two bullets</li> <li>• Changed bullet in Conditions that requests for service must come to the City Clerk’s Office versus Facilities Management</li> <li>• Deleted reference to direct deposit payment</li> <li>• Removed the reference to the form</li> </ul>
46	Training	Training	<ul style="list-style-type: none"> <li>• Simplified the conditions regarding proof of completion</li> <li>• Added a section called <i>Other information about training</i>: <ul style="list-style-type: none"> <li>○ Director’s education and training through a university-affiliated</li> </ul> </li> </ul>

			<p>program is eligible for funding through the Council General Expense Budget. See Section 8.8 for details.</p> <ul style="list-style-type: none"> <li>Removed the reference to the form</li> </ul>
47	Transportation – Car Rental	Transportation – Car Rental	<ul style="list-style-type: none"> <li>Added to eligible expense – recharging costs</li> <li>Rephrased eligible expense about membership and usage fees for shared auto services versus naming specific companies</li> <li>Clarified that the Mayor’s office can charge interdivisional charges for use of City Fleet vehicles.</li> <li>Two bullets under 'other information' was added to 'conditions'</li> <li>Under 'other information' heading, advising Members to consult with City Clerk's Office about what car share contracts may be in place.</li> <li>Removed the reference to the form</li> </ul>
48	Transportation – Highway Tolls	Transportation – Highway Tolls	<ul style="list-style-type: none"> <li>Added 'travel to' to the eligible expense</li> <li>Clarified the normal work location for staff as being either City Hall or the constituency office.</li> <li>Removed the reference to the form.</li> </ul>
49	Transportation – Kilometrage and Parking	Transportation – Kilometrage and Parking	<ul style="list-style-type: none"> <li>Added sentence at the beginning to note that the Mayor's Office has access to a Toronto vehicle and the cost of maintenance and fuel will be charged to their budget.</li> <li>Removed "trips by Councillors or their staff" from eligible expense as captured under first bullet</li> <li>Clarified the normal work location for staff as being either City Hall or the constituency office</li> <li>Added "insurance costs" under ineligible expense</li> <li>Added 'recharging' as an ineligible expense to be consistent with gas being an ineligible expense</li> <li>Deleted first bullet under conditions as captured in second bullet</li> </ul>

			<ul style="list-style-type: none"> <li>• Added that the City's auto insurance policy does not cover private vehicles to Other information.</li> <li>• Removed reference to the form</li> </ul>
50	Transportation – Public Transit	Transportation – Metropasses, TTC tickets or tokens	<ul style="list-style-type: none"> <li>• Renamed "Transportation – Metropasses, TTC tickets or tokens" to "Transportation – Public Transit"</li> <li>• Rephrased eligible expense to be transit fees for business travel to account for the fact that it could be by Presto Card, Debit Card or Credit Card or other payment methods to be determined.</li> <li>• Added Ineligible expense category to be consistent with other transportation categories: <ul style="list-style-type: none"> <li>○ Regular daily travel between home and the normal work location. For Members, City Hall is considered their normal work location. For staff, the normal work location is either City Hall or a constituency office</li> </ul> </li> <li>• Simplified Conditions section and removed references to memos and metropasses</li> <li>• Incorporated that transaction history can demonstrate the payment of the transit fee (to address using debit card for access to TTC/GO).</li> <li>• Removed reference to the form</li> </ul>
51	Transportation – Taxi, Ride Share and Bike Share	Transportation - Taxi	<ul style="list-style-type: none"> <li>• Added Ride share and Bike Share to title</li> <li>• Modified 'Rides in taxis between City Hall and home are permitted if a Member cannot drive after an official function.' To incorporate "ride share"</li> <li>• Under ineligible expense, modified 'modes of transportation to travel between home and work...' to 'modes of transportation to commute...' and added normal work location for Staff.</li> </ul>

			<ul style="list-style-type: none"> <li>• Removed reference to the form.</li> </ul>
52	Travel – Conferences, Seminars and Business Trips	Travel – Conferences, Seminars and Business Trips	<ul style="list-style-type: none"> <li>• Added sentence at the beginning to reference what is available from the Council Business Travel Budget and deleted the section <i>Provided from City's centralized resources</i>.</li> <li>• Added to eligible expenses: <ul style="list-style-type: none"> <li>○ Check luggage and Seat selection fees</li> <li>○ Fees associated with entry into a foreign country</li> <li>○ Ride share to taxi bullet</li> <li>○ Air fare when a Member needs to return for an unscheduled council meeting</li> </ul> </li> <li>• Changed 'hotel' costs to 'accommodation' costs</li> <li>• Reframed Conditions into different sections: <ul style="list-style-type: none"> <li>○ <i>Conditions – General</i></li> <li>○ <i>Conditions – Booking</i></li> <li>○ <i>Conditions – Before Travel</i></li> <li>○ <i>Conditions – After Travel</i></li> </ul> </li> <li>• Modified the condition of " Lowest economy fare for airfare or train at time of booking" to "Air or train fare at the time of booking must be within economy class" to remove "lowest"</li> <li>• Clarified the requirement to submitting an out-of-province conference report to the City Clerk which will be posted to the City's website.</li> <li>• Removed reference to Pcards as captured under section 5.3.</li> <li>• Added that Members should consult with the Integrity Commissioner in advance generally for any advice in relation to the travel.</li> <li>• Removed reference to the former Code of Conduct complaint procedure that has been replaced.</li> <li>• Deleted the following bullet on the basis that it was covered in the Code of Conduct:</li> </ul>

			<p>“Where the Councillor has sought the opinion of the Integrity Commissioner before traveling, and if the Integrity Commissioner receives a complaint about the very matter on which the Commissioner has already provided an opinion, the Integrity Commissioner will not investigate the complaint.”</p>
53	Websites and Social Media Tools	Websites and Social Media Tools	<ul style="list-style-type: none"> <li>• Added context about city-provided web page for members</li> <li>• Changed the Ineligible expenses from “Domain names other the one currently in use by the Councillor for posting Councillor information related to the business of the City.” to " Fees for domains/websites that are not owned and managed by the Member or their staff." Which will allow Members to own more than one website.</li> <li>• Separated some bullets from conditions and posted under <i>Other Information</i>.</li> <li>• Removed the reference to the form.</li> </ul>
54	Wireless Products & Services	Wireless Products & Services	<ul style="list-style-type: none"> <li>• Added introduction sentence that refers to section 8.4 for what City supplies from the Council General Budget, and deleted the <i>Provided from City resource section</i></li> <li>• Added to eligible expenses "Exception usage such as long distance costs exceeding a roaming plan"</li> <li>• Clarified that Members can expense monthly fees not covered by the Council General Expense budget.</li> <li>• Added to Conditions that Members may be able to purchase their smartphone.</li> <li>• Moved some bullets from Conditions and placed in Other information: <ul style="list-style-type: none"> <li>○ It is recommended, but not required, that</li> </ul> </li> </ul>

			<p>Members use the corporate vendor and corporate contract for better rates. They can choose from various phone types and monthly plans from the corporate vendor.</p> <ul style="list-style-type: none"> <li>○ Members need only provide the front pages of the monthly bill itemizing the services and charges. Back-up pages containing a detailed list of telephone calls is not required.</li> <li>○ Members can request to have their cell phone number transferred to their personal account and equipment at the end of the term.</li> <li>○ Members should review out-of-town requirements for their wireless products and purchase one-off roaming plans to avoid paying expensive roaming charges for their wireless products. The costs of such plans are paid for by the Council General Expense Budget.</li> </ul> <ul style="list-style-type: none"> <li>● Deleted <ul style="list-style-type: none"> <li>○ City Clerk's Office IT staff will offer to review Member plans with vendors regularly and suggest changes to the plan to ensure that the most cost-effective plan is chosen for the voice and data usage required</li> </ul> </li> <li>● Removed the reference to the form</li> </ul>
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**Section 8 – Resources Available to Members**

Change #	New Section Title	Old Section Title	Change
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55	Section 8	Appendix 1	<ul style="list-style-type: none"> <li>Renamed to Resources Available to Members</li> <li>Added introduction sentence</li> </ul>
56	8.1 Office Space A. City Hall Office	Section 1 Office Space a. City Hall Office	<ul style="list-style-type: none"> <li>Updated name of CREM</li> <li>Expanded bullet on reconfiguration of City Hall Offices to reflect current process.</li> <li>Simplified bullet on replacement of furniture</li> <li>Added a bullet on an inventory of furniture will be maintained</li> <li>Moved details about loaned City artwork from the Allowable Expenses entry on Office Decorations to this section</li> </ul>
57	b. Constituency Office	Section 1 Office Space b. Constituency Office	<ul style="list-style-type: none"> <li>Simplified the first and second bullet</li> </ul>
58	c. Touch-down Office Space	Section 1 Office Space c. Touch-down Office Space	<ul style="list-style-type: none"> <li>Updated how touch down space are equipped with docking stations</li> <li>Combined bullets on removing personal files and identification signage into the same bullet</li> </ul>
59	d. Meeting Rooms	Section 1 Office Space d. Meeting Rooms	<ul style="list-style-type: none"> <li>Updated the name of CREM</li> <li>Removed reference to the Toronto Public Library phone number</li> </ul>
60	8.2 Home Security	New	<p>New section – Provides Members with ability to expense home security.</p> <ul style="list-style-type: none"> <li>From the Council General Expense Budget, Members can expense up to: <ul style="list-style-type: none"> <li>\$2,000, inclusive of taxes, for a home audit and home security measures such as a home alarm system, doorbell camera/intercom and security cameras at their home; and</li> <li>Up to \$100, inclusive of taxes, per month for reimbursement of any security measure monthly monitoring fees and video storage fees for their home.</li> </ul> </li> <li>Members will work with City Clerk's Office, Member Services and Program Support and Corporate</li> </ul>

			<p>Security to arrange the home audit.</p> <ul style="list-style-type: none"> <li>• Members can submit claims for these expenses to the City Clerk's Office, Member Services and Program Support.</li> <li>• The \$2,000 entitlement is a lifetime maximum to expense the installation of equipment for the Member's primary home. If the Member moves during the Council term, the Member can expense installation of an audit and equipment again.</li> <li>• When a Member ceases to be a Member of Council, they will assume any monthly monitoring fees through their own personal funds and they will be able to keep any equipment installed at their home under this section.</li> </ul>
61	8.3 Parking	Section 1 Office Space e. Parking	<ul style="list-style-type: none"> <li>• Clarification of bullets</li> <li>• Removed the reference to CRA</li> </ul>
62	8.4 Information Technology a. Computers and Laptops	Section 2 Information Technology a. Computers and Laptops	<ul style="list-style-type: none"> <li>• The number of computers has been changed to be connected to the number of employees hired by a Member.</li> <li>• Additional information on the number of Monitors and docking stations to be provided out of the Council General Expense budget for each Member staff is set out: <ul style="list-style-type: none"> <li>○ 2 Monitors for City Hall, and an additional 2 monitors for either constituency office or a Member staff home office.</li> <li>○ Up to 3 docking stations, one for City Hall, one for a Constituency Office and one for a Member staff home office</li> </ul> </li> <li>• Removal of bullets with respect to meeting corporate standard as found in the eligible expense category for Computer Hardware, Software and Accessories.</li> </ul>

63	8.4 Information Technology b. Printers	Section 2 Information Technology  b. Printers	<ul style="list-style-type: none"> <li>Added bullet about three centrally-located printers on the 2<sup>nd</sup> floor</li> </ul>
64	8.4 Information Technology c. Software Applications	Section 2 Information Technology  c. Software Applications	<ul style="list-style-type: none"> <li>Revised first bullet to indicate the standard software applications are loaded on computers without specifying which software as the list of software will change.</li> <li>Deleted second bullet regarding individual software licenses</li> <li>Revised bullet on constituency constituent management system to delete the reference to a number of constituent management systems are available for installation to "Funding of up to \$4,000 per year is available from the Council General Expense Budget for Members to purchase constituency management software. Any additional costs will be covered within the Member's office budget."</li> </ul>
65	8.4 Information Technology d. Internet	Section 2 Information Technology  d. Internet	<ul style="list-style-type: none"> <li>Deleted bullet that "City will pay for one high-speed internet access fee" as already captured in Constituency Office Eligible Expense category.</li> <li>Deleted bullet with respect to City restrictions regarding access to internet as the bullet is not relevant.</li> </ul>
66	8.4 Information Technology e. Telephone	Section 2 Information Technology  e. Telephone	<ul style="list-style-type: none"> <li>Deleted reference to Fax</li> <li>Removed bullet with respect to 8 lines being provided and replaced with number of lines based on number of staff and a general number</li> <li>Replaced reference to faxes with "an e-fax line may be provided upon request."</li> <li>Deleted reference to processing monthly charges.</li> </ul>
67	8.4 Information Technology f. Wireless	Section 2 Information Technology  f. Wireless	<ul style="list-style-type: none"> <li>Simplified bullets</li> <li>Added a process to purchase a mobile device when the Member ceases to be a Member by adding:</li> </ul>

			<p>“When a Member ceases to be a Member of Council, the Member will be able to purchase their smartphone that was paid for by the City. The purchase price for the smartphone will be based on the trade-in value of the device. If the device has no trade-in value, the Member will pay \$25.”.</p>
68	8.4 Information Technology g. Television	Section 2 Information Technology  g. Television	<ul style="list-style-type: none"> <li>• Revised bullet about televisions at City Hall to allow for multiple televisions subject to power and space limitations in the office.</li> <li>• Added bullet that Constituency Office will be provided with one television subject to power and space limitations in the constituency office.</li> </ul>
69	8.4 Information Technology h. Video Conferencing Equipment	New	<ul style="list-style-type: none"> <li>• New section reflecting video conferencing equipment installed in Member offices in City Hall and in Constituency offices.</li> </ul>
70	8.5 Office Operations a. Office Supplies	Section 3 Office Operations  a. Office Supplies	<ul style="list-style-type: none"> <li>• Slight rewrite of first bullet</li> <li>• Deleted bullet on the honorary self-declaration system</li> <li>• Rephrased Moving Supplies to Packing Supplies</li> </ul>
71	8.5 Office Operations b. Mail and Photocopiers	Section 3 Office Operations  b. Mail and Photocopiers	<ul style="list-style-type: none"> <li>• changed the delivery of mail to at least once a day, from twice.</li> <li>• Rephrased second bullet in regards to photocopy stations to copy areas.</li> </ul>
72	8.5 Office Operations c. Insurance	Section 3 Office Operations  c. Insurance	<ul style="list-style-type: none"> <li>• rewritten to reflect the use of the bullets with no substantive changes</li> </ul>
73	8.5 Office Operations d. Legal Fees	Section 3 Office Operations  d. Legal Fees	<ul style="list-style-type: none"> <li>• Replaced Councillors with Members throughout the section.</li> </ul>

74	8.5 Office Operations e. Entitlement equivalent to production and distribution of a newsletter/flyer to all households	Section 3 Office Operations e. Entitlement equivalent to production and distribution of a newsletter/flyer to all households	<ul style="list-style-type: none"> <li>Broke up the section from one bullet to multiple bullets to improve readability.</li> <li>Added that expenses beyond the entitlement are paid from the Member's CSOB.</li> </ul>
75	8.5 Office Operations f. Entitlement equivalent to production and distribution of a newsletter/flyer to all households	Section 3 Office Operations f. Entitlement related to the meeting of the Accessibility for Ontarians with Disabilities Act (AODA)	<ul style="list-style-type: none"> <li>Minor updates changing Councillor to Members</li> </ul>
76	8.6 Staffing a. Staff Hiring	Section 4 – Staffing a. Staff Hiring	<ul style="list-style-type: none"> <li>Deleted most of the section as covered by the Human Resources and Ethical Framework.</li> <li>The remaining bullet is with respect to Member Staff Salaries are paid for out of the appropriate budget (Council Staffing or Mayor's Office).</li> </ul>
77	b. Staff benefits	Section 4 – Staffing b. Staff Benefits	<ul style="list-style-type: none"> <li>Deleted the existing bullets and replaced with Benefits are paid out of the Council General Budget for all Members staff.</li> </ul>
78	NA	Section 4 – Staffing c. Overtime and Lieu Time Payouts	<ul style="list-style-type: none"> <li>Deleted the section as captured in the employee contract and the non-union lieu time policy.</li> </ul>
79	d. Replacement Staff Funding	Section 4 – Staffing d. Replacement Staff Funding	<ul style="list-style-type: none"> <li>Changed “Vacation replacement for Councillor staff whose annual vacation entitlement exceeds three weeks; and”  to “Vacation replacement for Councillor staff whose annual vacation entitlement exceeds three weeks, when the staff members take the vacation all at once and there is pressure in the staffing budget for the replacement.</li> </ul>
80	8.7 Intergovernmental-Related Business Travel	Section 5 - Intergovernmental-Related Business Travel	<ul style="list-style-type: none"> <li>Update to proper name of 'Metropolis' organization</li> </ul>

81	8.8 Director's Training	new	<ul style="list-style-type: none"> <li>Added this section to reflect City Council previous direction with respect to the availability of Director's Training for Members of Council.</li> </ul>
<b>General changes that were applied throughout the policy</b>			
Change #	Type of Change	Details	
82	Minor edits	<ul style="list-style-type: none"> <li>Grammar changes to tighten up language</li> <li>Consistency in capitalization and terminology</li> <li>Short forms (CSOB, MCOP, Member, etc)</li> <li>Deleted references to obsolete items (e.g. fax machines...)</li> <li>Added links to policies and other references</li> </ul>	
83	Formatting and organization	<ul style="list-style-type: none"> <li>Removed shaded background from cover page</li> <li>Moved revision list to inside first page from cover and provided Council references</li> <li>Eliminated use of tables to improve accessibility</li> <li>Deleted the list of all allowable expenses in the table of contents.</li> </ul>	
84	Deleted glossary and appendices	<ul style="list-style-type: none"> <li>Glossary – not necessary</li> <li>Appendix 2: added the information to Legislation &amp; Bylaws section</li> <li>Excerpts from code of conduct: added links in body of the policy</li> <li>Appendix 3, policy on donations: added links in body of the policy</li> </ul>	
85	Allowable expenses	<ul style="list-style-type: none"> <li>Made sure all points are under the correct subheading (e.g. Conditions vs Other Information)</li> <li>Removed the forms that were listed</li> </ul>	

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<p><b>1. Glossary</b></p> <p><b>2. Introduction</b></p> <p>2.1 Council General Expense Budget</p> <p>2.2 Councillor Business Travel Budget</p> <p>2.3 Councillor Staffing Budget</p> <p>2.4 Constituency Services and Office Budget</p> <p>2.5 Program Budget</p> <p><b>3. Guiding Legislation and By-laws</b></p> <p><b>4. Policy Overview</b></p> <p>4.1 Purpose</p> <p>4.2 Scope</p> <p>4.3 Principles</p> <p>4.4 Purchasing, Accounting...</p> <p>4.5 Roles and Responsibilities</p> <p>4.6 Using Personal Funds...</p> <p>4.7 Expenses During an Election Year</p> <p>4.8 Review Process</p> <p>4.9 Disclosure</p> <p>4.10 Future Policy Updates</p> <p><b>5. Allowable Expenses:</b> 41 entries. not listed here</p> <p><b>Appendix 1:</b> Resources available/allocated to Councillors</p> <p>1. Office space</p> <p>2. Information Technology</p> <p>3. Office Operations</p> <p>4. Staffing</p> <p>5. Intergovernmental-Related Business Travel</p> <p><b>Appendix 2</b> – Legislation guiding councillor expenses and excerpts from code of conduct relevant to CSOB policy</p> <p><b>Appendix 3</b> – Policy on donations to Council Member-organized community events</p>	<p><b>1. Policy Overview</b></p> <p>1.1 Purpose</p> <p>1.2 Scope</p> <p>1.3 Principles</p> <p>1.4 Guiding Legislation, Standards and By-laws</p> <p>1.5 Disclosure</p> <p>1.6 Future Policy Updates</p> <p><b>2. Available Budgets</b></p> <p>2.1 Council General Expense Budget</p> <p>2.2 Councillor Business Travel Budget</p> <p>2.3 Councillor Staffing Budget</p> <p>2.4 Mayor's Office Annual Operating Budget</p> <p>2.5 Constituency Services and Office Budget (CSOB)</p> <p>2.6 Program Budgets</p> <p><b>3. Roles and Responsibilities</b></p> <p>3.1 Council Members</p> <p>3.2 City Clerk's Office</p> <p><b>4. Using Personal Funds, Furniture &amp; Equipment</b></p> <p><b>5. Purchasing, Accounting and Payment Processes</b></p> <p><b>6. Member Expenses and Elections</b></p> <p><b>7. Allowable Expenses</b></p> <ul style="list-style-type: none"> <li>• 34 entries, not listed here</li> </ul> <p><b>8. Resources Available to Members</b></p> <p>8.1 Office space</p> <p>8.2 Home Security</p> <p>8.3 Parking</p> <p>8.4 Information Technology</p> <p>8.5 Office operations</p> <p>8.6 Staffing</p> <p>8.7 Intergovernmental-Related Business Travel</p> <p>8.8 Director's Training</p>