
Company Anniversary Or Milestone Celebration Planning Policy & Workflow

1.0 Policy Objective & Scope

The objective of this policy is to establish a standardized administrative framework for planning, approving, and executing company anniversary or milestone celebrations. This policy ensures that all such events are conducted in a fiscally responsible manner, align with corporate culture, and comply with Canadian employment standards and privacy regulations.

This policy applies to all full-time and part-time employees, contractors, and departments within the manufacturing company who are involved in initiating, approving, organizing, or participating in milestone celebrations, including but not limited to company anniversaries (e.g., 5, 10, 20 years), project completions, or significant corporate achievements.

2.0 Roles & Responsibilities

- **HR Manager:** Oversees the entire celebration planning process, ensures compliance with company policies and Canadian employment laws, and maintains employee recognition records.
- **Department Head:** Initiates the celebration request, provides budget estimates, and approves employee participation within their department.
- **Finance Officer:** Reviews and approves the celebration budget, processes purchase orders, and ensures expenditures are within allocated funds.
- **Administrative Coordinator:** Handles logistics such as venue booking, catering, invitations, and vendor coordination; documents the event plan in SwitchDesk.
- **IT Administrator:** Provides technical support for virtual celebrations, ensures data privacy for attendee lists, and manages any digital recognition platforms.
- **CEO / President:** Provides final approval for major milestone celebrations (e.g., 25th anniversary) and may serve as the keynote speaker.

3.0 Core Rules & Guidelines

- All celebration requests must be submitted at least 30 days before the proposed event date to allow adequate planning and budget approval.
- The total budget for any single celebration must not exceed \$5,000 without explicit written approval from the CEO.
- Employee attendance is voluntary; no employee shall be penalized for non-participation.
- All personal data collected for event planning (e.g., dietary restrictions, contact information) must be handled in accordance with PIPEDA and stored securely in SwitchDesk.
- Celebrations must be inclusive and respectful of all cultural and religious backgrounds; no alcohol may be served without prior HR approval.
- Virtual celebrations must use company-approved platforms (e.g., Microsoft Teams) and comply with IT security protocols.

- All expenditures must be supported by receipts and submitted to Finance within 10 business days after the event.

4.0 Step-by-Step Procedure / Workflow

1. The Department Head or HR Manager identifies an upcoming milestone (e.g., company anniversary, employee service milestone) and initiates a celebration request via the SwitchDesk portal.
2. The initiator completes the Celebration Request Form, specifying the milestone type, proposed date, estimated budget, number of attendees, and preferred format (in-person, virtual, or hybrid).
3. The HR Manager reviews the request for policy compliance, including budget limits and inclusivity guidelines, and either approves or returns it for revisions within 3 business days.
4. The Finance Officer reviews the budget estimate, confirms availability of funds, and provides a budget code for expenditures; if the budget exceeds \$5,000, the request is escalated to the CEO for approval.
5. Once approved, the Administrative Coordinator creates a detailed event plan in SwitchDesk, including venue booking, catering, decorations, and any vendor contracts.
6. The Administrative Coordinator sends a preliminary invitation to all eligible employees via email, with a request to RSVP and provide any dietary or accessibility needs within 7 days.
7. The IT Administrator sets up any required virtual meeting links, tests audio/video equipment, and ensures that attendee data is stored securely in compliance with PIPEDA.
8. One week before the event, the Administrative Coordinator finalizes the attendee list, confirms vendor bookings, and prepares a run-of-show document for the event team.
9. On the day of the celebration, the Administrative Coordinator and HR Manager oversee the event setup, manage the schedule, and address any last-minute issues.
10. After the event, the Administrative Coordinator collects all receipts and invoices, submits an expense report to Finance within 10 business days, and updates the event record in SwitchDesk.
11. The HR Manager sends a post-event feedback survey to attendees to assess satisfaction and gather suggestions for future celebrations.
12. The HR Manager files a final event summary report in the company's shared drive, including budget vs. actuals, attendance numbers, and lessons learned.

5.0 Documentation & Compliance

1. All celebration requests, approvals, and expense reports must be logged in the SwitchDesk admin portal under the 'Events' module for audit trail purposes.
2. Employee personal data collected for event planning (e.g., dietary restrictions, accessibility needs) must be stored in a secure, access-controlled folder and deleted within 90 days after the event unless consent is obtained for future use.
3. A bi-annual audit of celebration expenditures and compliance with budget limits will be conducted by the Finance Officer and reported to the CEO.
4. All vendor contracts and agreements must be reviewed by the Legal department (or designated external counsel) if the contract value exceeds \$2,000.

5. Event feedback and summary reports must be retained for a minimum of 2 years for continuous improvement and compliance review.

Regulatory Disclaimer: This document is a generic administrative template provided for educational purposes. The end-user assumes all liability for reviewing, adapting, and validating all protocols against organizational policies.