

PX CONFERENCE REPORT

DETAILS

Date: December 10-12, 2025	Conference: Developing Policy that Performs, a component of Certificate in Policy Development & Implementation
Time: 10:00 am – 3:00 pm	Location: Sobey School of Business, Saint Mary's University
PX: Joel Swaan	(Halifax) (virtual)

SUMMARY

Saint Mary's University in Halifax, Nova Scotia is located on the ancestral lands and unceded territory of the Mi'kmaq People. These lands are covered by the Treaties of Peace and Friendship, signed in 1725 by the Mi'kmaq and Wolastoqiyik peoples with the British Crown. The treaties recognized Mi'kmaq and Wolastoqiyik title—surrendering neither land nor resources—and established rules for what was to be an ongoing relationship between nations.

Developing Policy That Performs is the first module in the four-course Certificate in Policy Development and Implementation. I signed up for this certificate with Governance and Fiduciary Education funds to support my work as chair of the Bylaw & Policy Committee, as well as my obligation to maintain the Provincial Executive Procedures Manual (Bylaw I, Article 8,4 (e)).

This course lays the groundwork for the others to follow. It covered the basics of what policy is, how it is used and by whom, as well as policy considerations and impacts. It covered the planning cycle and explained how to set/influence the policy agenda, develop policy, and use key processes and tools. I should also say that the course focuses on policy development for those that are empowered to create and implement policy, not for policy to be voted on by delegates at an annual general meeting.

Policy is a tool used by the most senior authority in an organization to delegate authority to achieve specific goals and outcomes (without breaking rules or going against values). How policy gets actualized is left to the party to whom authority has been delegated (separation of Policy and Process). Policy is not Process, Procedure, or Protocol. Process and procedure are instruments of policy that provide the



means through which it is implemented. Process and procedure establish implementation rules, identify how the policy will look in practice, and identify constraints. Other Policy instruments are budgets, performance management systems, organizational structures, service delivery models, legislation, etc.

Policy documents are simply one means of “communicating” policy. Effective policy is intentional and:

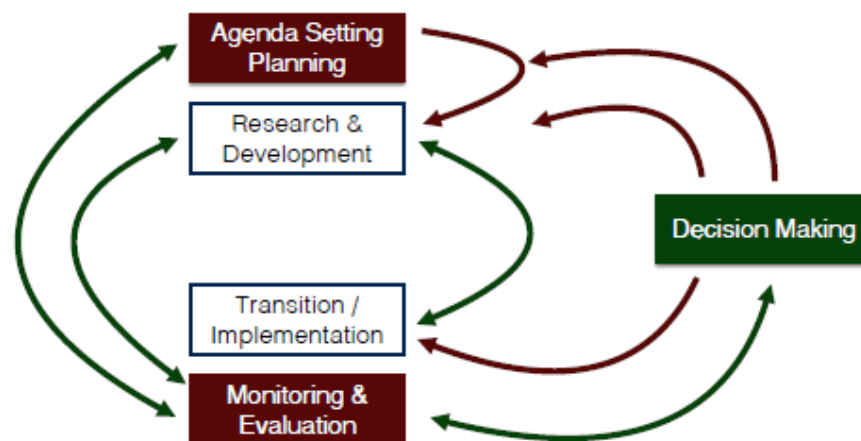
- developed within the context of the organization and the environment within which the organization functions;
- developed and brought through a cycle and process that will ensure it reflects and will achieve clear, measurable intended ends (goals) and assumptions (implicit and explicit).

It is:

- Aligned to organizational purpose, values, and commitments,
- Often not “one size fits all”,
- Flexible and adaptable,
- Affordable, implementable,
- Comprehensively implemented,
- Monitored and measured to ensure it produces desired impacts.

Once policy is determined (usually written), it gets brought to life through structures, culture, behaviours, practice, reporting, speeches, budgets, etc.

Policy cycle is Agenda setting (Prioritizing)→Research and Development (Planning)→Decision Making→Transition/Implementation→Monitoring/Evaluation→back to Prioritizing. As an inter-related process, it looks more like this:



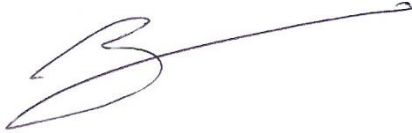
The course the focused on the first three steps in the cycle (the others are covered in later courses): Agenda Setting – how to determine when you need a policy, and how to begin the process by setting it as an agenda item; Research and Development – what factors to take into consideration to develop the policy; and Decision Making – weighing all the factors and setting the policy.

As I moved forward with policy work with the Society, it will be helpful to review the course content to ensure that steps aren’t being skipped, and that policy development is a thoughtful, comprehensive process. It will also be important to continue to review policies and to treat them like

the evergreen constructs that they are. Policies should drive Society improvement as we codify our mission, goals, and values, but they should also change as our growth leads to new understandings and new priorities.

Thanks to the Provincial Executive for approving the funding for this work. Next up is Writing Effective Policies and Procedures (March), then Implementing Policy and Managing the Change (May) and Policy Evaluation (June).

Respectfully submitted,

A handwritten signature in blue ink, appearing to be 'Joel Swaan', with a long horizontal stroke extending to the right.

Joel Swaan
Provincial Executive