

PX CONFERENCE REPORT

DETAILS

Date: March 23-25, 2026	Conference: Writing Effective Policies and Procedures a component of a Certificate in Policy Development & Implementation
Time: 11:00 am – 3:00 pm	Location: Sobey School of Business, Saint Mary's University (Halifax) (virtual)
PX: Joel Swaan	

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.

Writing Effective Policies & Procedures, taught by Eileen Pease, is the second 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)).

A policy determines how things are done in an organization; guides decision-making; reinforces the mission, purpose, and values of an organization; often serves as a handbook; and is not law (guides, but doesn't compel).

Well-written policies are easy to read and understand; make plans, rules, and aspirations clear to all; help people feel respected and appreciated; and clearly state rights and duties of the organization and employees.

In preparing to write policy, consider "Why?" (what will readers *learn* and *do*) and "Who" (Primary audience: "What's in it for me" and Secondary audience:



Executive & Professional Development

This is to certify that

Joel Swaan

Has successfully completed the requirements for

**Writing Effective
Policies and Procedures**


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Sobey School of Business, Saint Mary's University
Halifax, Nova Scotia, Canada

March 25, 2026
Date



“What’s in it for us?”). We discussed and practiced the process of preparing, drafting, and polishing policy, and many principles of *writing*, as opposed to principles of *policy*.

A suggested policy template should include:

- **Purpose:** what intends to accomplish; why it is needed
- **Scope:** boundaries – who, what, and where the policy applies. Ensures relevance and prevents confusion
- **Policy Statement:** main content; answers most questions users might have
- **Roles & Responsibilities:** of board, management, staff. Who is responsible for developing, maintaining, monitoring, implementing
- **Definitions:** defines terms, simplifies technical terms, avoids legal jargon
- **Questions:** identifies to whom questions should be directed
- **References:** citations of sources of information used; appendices
- **Dates:** Effective date, review dates, approval date

We talked a lot about readability and measurement tools: suggested grade-levels, sentence length, sentence count, and number of words with three syllables or more. Also structure: paragraph and sentence unity and coherence. (also, Oxford comma = yes!).

When writing procedures, we were encouraged to put ourselves in the shoes of the person trying to implement the policy/procedure. Consider background information needed, jargon, reading level, anticipate questions and problems, and use pictures and diagrams as appropriate. Include why the procedure is important; who is involved and their responsibilities; what equipment is needed; where, when, and how activities take place; and how to get help.

These courses are proving to be helpful and informative. I appreciate the theoretical and practical help, and I look forward to ongoing opportunities to implement what I’m learning. Thanks to the Provincial Executive for approving the funding for this work. Next up is 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