### Policy and Procedure Development and Revision

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| **SECTION:** | Administrative | **ORIGINATED:** | November 2006 |
| **TITLE:** | **POLICY/PROCEDURE DEVELOPMENT & REVISION** | **REVISED:** | Nov 2023 |
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**PURPOSE**

To outline the process for developing and revising policies and procedures that facilitate the chapter functioning in a consistent manner.

##### POLICY

* + 1. Any member of the Executive or chapter may initiate a policy at large.
    2. All policies are reviewed on a bi-annual basis by the Past-President and revised as necessary, engaging the assistance of appropriate members.
    3. The general membership will be notified of policies under review.

##### STRUCTURE

This format will be considered in developing each policy/procedure, but may not be appropriate in all situations.

**Purpose** - rationale for the policy and/or subject; may include philosophy statements

**Policy** - rules/position statements – policy statements should be numbered and be concise

**Structure** - formal arrangements

**Term** - for position descriptions, the term of the position

**Eligibility Criteria** - for position descriptions, criteria required for election/appointment

**Function** - responsibilities of a role, position, committee or group

**Procedure** - how to implement the functions of the role

**References** - documents used to develop the policy (e.g., IPAC Canada Policies & Procedures, Terms of Reference, other Chapter policies, Meeting minutes)

##### PROCEDURE

1. Any member may propose new policies or revisions to existing policies.
2. The Past-President, in conjunction with the Administrative Assistant, will review all policies on a bi-annual basis and revise as necessary, engaging the assistance of appropriate members.
3. Executive members and Committee Chairs will review and revise, as necessary, policies pertinent to their position or committee.
4. The general membership will be notified by email of policies under review, directed to the chapter website for draft policies, and will be given a deadline to respond.
5. All proposed changes or new policies are sent to the President who will review and present the policy to the Executive for discussion and approval.
6. Once approved, the original of new and revised policies is uploaded to the IPAC EO Google Doc account.
7. The policies are updated centrally (e.g., Google Docs) by the Administrative Assistant as required (i.e., every two years).
8. The Administrative Assistant will:
   1. Maintain an electronic record of each approved policy/procedure on IPAC EOs Google Docs account for archive purposes;
   2. Provide an electronic copy of finalized policies to the webmaster for posting on the chapter website; and
   3. Ensure that the membership is notified of new/revised policies.

##### CHAPTER GOOGLE DOC ACCOUNT

1. The manual with original policies is retained and updated by the President.
2. Each of the following is provided access to the manual through Google Docs: President

Past President President-elect Secretary Treasurer

Membership Director Administrative Assistant Archivist

Novice ICP Education Chair Webmaster

1. Access to the Google Docs will be transferred to incoming Chapter Executive members at the end of the current holder’s term of office or passed to the Administrative Assistant.
2. Policies will be available on the chapter website at <http://eo.ipac-canada.org/policy-manual.php>.

##### REFERENCES

1. IPAC Canada policy/procedure # 6.10

[<http://ipac-canada.org/photos/custom/Members/policies/6-10.pdf>