



Course Leader
Alan W. Kennedy,
Gibson Kennedy & Company

Course Leader
Ali Ikram,
SAP



Jason K. Cameron,
CNSC



Richard F.D. Corley,
Goodmans LLP



Mark Fleming,
**Janssen Inc. (Pharmaceutical
Companies of Johnson & Johnson)**



Richard Leblanc,
York University



Bob Malcolmson,
**Greater Oshawa Chamber of
Commerce**



Fiona Oliver-Glasford,
Enbridge Gas Distribution



Andrew Palmer,
Scotiabank



Lawrence E. Thacker,
**Lenczner Slaght Royce Smith
Griffin LLP**



Ula Ubani,
BMO Financial Group



John B.A. Wilkinson,
WeirFoulds LLP



John Wunderlich,
John Wunderlich & Associates



David M.W. Young,
David Young Law



Pierre J.F. Lebel,
**Epiphane Consulting and
HR-Doctors**



Pauline Reid,
Region of Durham

2nd

High Level Policy Development

February 12 & 13, 2015, Toronto

Workshop Included:
Policy Enforcement and Maintenance

who should attend

Public & private sector senior-level executives, directors & advisors responsible for policy development & process management of research, analysis, formulation, evaluation, strategy & implementation

course highlights

- Developing a shared understanding of policy
- Understanding the difference between short- and long-term goals
- Drawing practical conclusions from research and analysis
- Identifying and implementing the right solutions at the right time for the right audience
- Improving efficiency and effectiveness of the spend
- Determining whether policy should be amended or left in place
- Establishing a consistent structure

Speakers & Participating Organizations

Two-Day Event!



COURSE LEADERS

ALAN W. KENNEDY

Alan Kennedy is a Partner at **Gibson Kennedy & Company**. His practice focuses exclusively on helping senior management with project planning and strategy communication.

ALI IKRAM

Ali Ikram is Senior Director within the Global Compliance Office at **SAP**. He has over 14 years of experience in various fields including public accounting, internal audit, project management, risk management and legal compliance.

RICHARD F.D. CORLEY

Richard Corley is a Partner at **Goodmans LLP**. His practice focuses on the intersection of law and technology.

MARK FLEMING

Mark Fleming is Director of Federal Affairs & Health Policy at **Janssen Inc.**

RICHARD LEBLANC

Richard Leblanc is Associate Professor, Governance Law & Ethics at **York University**.

BOB MALCOLMSON

Bob Malcolmson is Chief Executive Officer & General Manager at the **Greater Oshawa Chamber of Commerce**.

FIONA OLIVER-GLASFORD

Fiona Oliver-Glasford is Senior Manager, Market Policy, Research and DSM at **Enbridge Gas Distribution Inc.**

ANDREW PALMER

Andrew Palmer is Senior Manager, Governance and Quality at **Scotiabank**.

LAWRENCE E. THACKER

Lawrence Thacker is a Partner at **Lenczner Slaght Royce Smith Griffin LLP**.

ULA UBANI

Ula Ubani is Director Environmental Social & Governance at **BMO Financial Group**.

JOHN B.A. WILKINSON

John Wilkinson is a Partner at **WeirFoulds LLP**.

JOHN WUNDERLICH

John Wunderlich is President at **John Wunderlich & Associates**.

DAVID M.W. YOUNG

David Young is Principal at **David Young Law**, a privacy and regulatory law counsel practice.

PIERRE J.F. LEBEL

Pierre J.F. Lebel is President and Founder of **Epiphane Consulting and HR-Doctors**.

PAULINE REID

Pauline Reid is Director Corporate Policy Strategic Initiatives at the **Region of Durham**.

CO-LECTURERS

JASON K. CAMERON

Jason Cameron is the Vice-President and Chief Communications Officer, Regulatory Affairs Branch at the **Canadian Nuclear Safety Commission**. He has diverse experience in nuclear and regulatory policy-making, as well as international relations.

COURSE PROGRAM



CREATING A COLLABORATIVE FRAMEWORK FOR POLICY DEVELOPMENT

Developing policy, being defined as guidance for strategy implementation, is challenging because it impacts the organization as a whole. Therefore, development of policy requires a thorough understanding and agreement on the current strategies and policies of an organization and how responsibility for their implementation is distributed. It also requires agreement on the broad parameters of what is and is not an acceptable strategy implementation practice. This presentation will provide practical advice on how to create a structured collaborative framework for high-level policy making.

- Understanding the relationship between strategy and policy
- Understanding current strategies and their related implementation policies
- Understanding the drivers of the need for policy change
- Understanding distribution of strategy implementation responsibility
- Achieving clarity around roles and responsibilities for strategy and policy
- Understanding cross-functional relationships

INTEGRATING ISSUE ANALYSIS WITH POLICY-MAKING

Effective high-level policy-making depends on informed issue analysis, backed by evidence. Establishing a successful issue analysis methodology for converting research findings into practical data used to implement real change in policy is crucial to success. This session will explore the best practices used to ensure that the findings from issue analysis can be converted into practical applications for effective high-level policy development.

- Deriving the true value of the research
- How to draw practical conclusions from issue analysis
- Understanding the difference between short- and long-term goals
- Strategic techniques to pave the way for action
- Interrelationship between issue analysis and problem definition
- Use of comparative data and analysis
- Situating the issues within a context

This program has been approved for 4 Continuing Professional Development (CPD) hours by HRP (HRPA™)



While nothing compares to the experience of attending the live event, with its enhanced networking opportunities and direct contact with leading experts, for those unable to attend in person FP provides a convenient option to still benefit from this unsurpassed learning experience:

FP's live interactive Webcasts allow you to actively participate in events, from downloading all material distributed by lecturers to asking speakers questions.

WORKING WITH ASSOCIATIONS AND STAKEHOLDERS TO SHAPE PUBLIC POLICY

Critical to effectively managing high-level policy development is the building of trust and understanding, which requires ongoing dialogue among key stakeholders and departments. This discussion details best practice approaches to reporting, which manages stakeholders' expectations and incorporates feedback in the challenging public policy environment.

- Generating an open dialogue among internal stakeholders
- Communicating messages persuasively to diverse audiences
- Facilitating a deeper exchange of views and ideas crucial to success of a policy initiative
- Managing multiple expectations in the policy development/coordination process
- Ensuring communications are open and transparent
- Facilitating inter-departmental communication and consultations

ROLE OF RESEARCH IN POLICY DEVELOPMENT AND REFORM: PROVIDING EVIDENCE TO BACK POLICY

Sound policy should be deeply rooted in good, substantiated research in order to ensure that policies achieve their intended goals and outcomes. Facts, figures and hard evidence originate from research and analysis; managing policy/research relationship thus becomes inevitable and crucial in the business of policy making. This session will explore the best practices used to ensure that the findings from data and research analysis can be practically applied for effective policy making.

- Understanding the issue and the data supporting it
- Drawing practical conclusions from research and analysis
- Establishing criteria and considerations in designing policy options
- Bridging the gap between research and policy

HIGH POLICY REVIEW & APPROVAL PROCESS

High level policies cannot afford to be outdated. No policy can be effective unless it is carefully monitored and revised if necessary upon regular reviews. As well, organizations should assess the level of non-compliance with any given policy in order to determine whether the policy should be amended. This session will examine how to go about establishing an effective policy review and approval process in order to maximize the ultimate goal of changing behaviour over time.

- Establishing a review process: key components
- Forming a committee to review proposed policies and policy revisions
- Approval process for proposed policies
- Effective, monitoring, review and reporting arrangements
- Acting on findings from review: revisions to existing policy
- Designing the project team: getting all key stakeholders to the table at the outset
- Ensuring everyone buys in to the need for change
- Bottom-up and top-down approvals and ownership

IMPLEMENTING ORGANIZATIONAL PROCUREMENT POLICIES: THE BENEFITS

Procurement policies are designed to ensure timely, efficient, and economic procurement, within the guidelines of good business practices. These policies provide clear guidance to ensure both fairness and transparency as well as accountability for decisions regarding procurement. This session will explore best practices for implementing organizational procurement policies.

- Key features in the development of procurement policies
- Improving efficiency and effectiveness of the spend
- Driving additional value from supplier relationships
- Encouraging competition among contractors
- Ensuring objectivity, accountability and transparency to achieving value

CASE STUDY: LEADERSHIP IN POLICY & ADVOCACY AT THE GRASSROOTS

While teamwork is required in policy development, strong leadership at the grass roots level is key to constructively influencing governments at all levels. This presentation is a case study in a grass roots business organization at the community level develops policy on major business issues that are important at a local, provincial or national level and how it advocates influencing governments at these levels.

- Balancing governance, leadership, and accountability to its members while working with a volunteer committee and board to establish goals and potential conflicts while developing policy
- Examples of success stories at the grass roots level
- Identifying issues and the development of policy and taking it to a successful conclusion

WRITING AND IMPLEMENTING POLICIES

Writing policies that are effective and enforceable can be a difficult task. To develop good policies, it helps to understand exactly what a policy is and how it relates to governance, risk and strategy. This session will explore policy writing best practices and the basic salient features one has to be aware of when writing and implementing high level policy and procedures such as guidelines, charters, position descriptions and codes.

- Pre-drafting work: thinking, analyzing, researching
- Avoiding conflicts of interest, and choice of words
- Ensuring clarity and consistency
- Implementing, assuring and enforcing the policy

DEVELOPING OPTIONS TO POLICY DECISIONS

A key component of high level policy development is the generation and evaluation of viable options for moving forward. This session will explore the process for developing options to high level policy decisions.

- Evaluation of options against a set of criteria used to assess each option
- Best practices for successfully generating and assessing options
- Establishing a conceptual framework to guide the process
- Assessing pros and cons of each policy option in relation to set of criteria
- Risks associated with not generating policy options
- Keys to presenting options
- Presenting a comparison of options

WORKSHOP

POLICY ENFORCEMENT AND MAINTENANCE

No policy can be effective unless it is carefully monitored and maintained through the conduct of regular reviews. Corporations should assess the level of non-compliance with any given policy in order to determine whether the policy should be amended or left in place without notification. This session will examine best practices for policy enforcement and maintenance.

- Policy enforcement and maintenance best practices
- Effective procedures for monitoring and revising policy
- Conducting regular reviews of policy
- Assessing the level of non-compliance with policy



The "Proceedings" is your Web repository of learning resources for this event. It includes:

- the recording of the lectures at the forthcoming event itself, including documentation, slides and audio-visual;
- 25 or more carefully selected additional lectures (below), which are intended as a recommended enrichment of the course content, with many additional topics covered.

The price of the Proceedings (one user licence) is \$299 if you are attending in person or by Webcast; or \$799 otherwise.

Strategic Planning Tools

Bill Newman
Greater Toronto Airports Authority

The Strategic Planning Process

Ken Smith
Dundee Associates

Strategic Roadmap to Prioritizing and Selecting BPR Initiatives

Meredith Ng
Ainsworth Inc.

Communicating the Strategic Plan

Stacey Karpman
Future Electronics Inc.

Avoiding Pitfalls in Strategic Planning

Barry Nelson
Practical Management of Canada Inc.

Situational Analysis

Derek S.T. Baldwin
IBIS Corporation

Putting the 'Strategic' Back into Strategic Planning

Anne Donaldson-Page
stratAHEAD

Bringing Social Media into the Strategic Planning Process

Michael Rabinovici
AR Communications Inc.

Execution of the Strategic Plan

Candice Chow
Purolator Inc.

Developing Performance Outcomes for measuring Your Strategic Plan

Eric Mézin
Office of Francophone Affairs (Ontario)

Translating Strategy into Action

Jim Love
Chelsea Consulting Group

Conducting an Industry Analysis

Jon Heppenstall
Staples

Strategy Implementation Best Practices

David Proulx
Research in Motion

Achieving the Enterprise Strategy Through Project Execution

Tom Atkins
Tramore Group

Aligning Internal Controls to Business Strategy

Jeff Thomas
KPMG LLP

Developing a Horizontal Policy-Making Culture

Catherine Parker
Health Canada

Linking Workforce Planning to Business Strategy

David Huggins
Andros Consultants Ltd.

Linking the Strategic Plan to the Financial Plan

Steve Filby
Sun Life Financial

Reading Between the Lines: Strategic Thinking and Management Decision Making

Bill Newman
Greater Toronto Airports Authority

A Healthy Horizontal Policy Development Team

George Neufeld
Traverse Group

Aligning OT with Business Strategy

Cindy Morris
Ontario Telemedicine Network

Incorporating Risk Management into the Strategy Formation Process

Jeff Thomas
KPMG LLP

Case Study: Enabling Business Strategy Through Talent Development

Bernice Parent
MTS Allstream Inc.

Setting a Realistic Schedule for Strategic Planning

Barry Nelson
Practical Management of Canada Inc.

Developing Governance Strategy, Policies and Protocols to Manage Social Media Legal Risks

Giuliana Marinelli
Royal Bank of Canada

Registration: To reserve your place, call Federated Press toll-free at 1-800-363-0722. In Toronto, call (416) 665-6868 or fax to (416) 665-7733. Then mail your payment along with the registration form. Places are limited. Your reservation will be confirmed before the course.

Location: Courtyard by Marriott Downtown Toronto, 475 Yonge Street, Toronto, ON, M4Y 1X7

Conditions: Registration covers attendance for one person, the supplementary course material as described in this document, lunch on both days, morning coffee on both days and refreshments during all breaks. The proceedings of the course will be captured on audio or video.

Time: This course is a two-day event. Registration begins at 8:00 a.m. The morning sessions start promptly at 9:00. The second day ends at 5:00 p.m.

Cancellation: Please note that non-attendance at the course does not entitle the registrant to a refund. In the event that a registrant becomes unable to attend following the deadline for cancellation, a substitute attendee may be delegated. Please notify Federated Press of any changes as soon as possible. Federated Press assumes no liability for changes in program content or speakers. A full refund of the attendance fee less 15% administration fee will be provided upon cancellation in writing received prior to January 28, 2015. No refunds will be issued after this date.

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TO REGISTER FOR 2ND HIGH LEVEL POLICY DEVELOPMENT

Name _____
 Title _____ Department _____
 Approving Manager Name _____
 Approving Manager Title _____
 Organization _____
 Address _____
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 Telephone _____ Fax _____ e-mail _____
 Please bill my credit card: AMEX VISA Mastercard
 # _____ Expiration date: ____ / ____
 Signature : _____
 Payment enclosed: Please invoice. PO Number: _____

REGISTRATION COSTS

NUMBER OF PARTICIPANTS:
 COURSE: \$1975
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