
from *Scoop Magazine*, Summer 2015

"Good policies, happy members" by Thom Armstrong

Here are some guidelines to help you navigate the policy process.

A policy should be **simple**. Write it in plain language, not legal jargon. Keep sentences short (in fact, keep the whole policy as short as possible). Be ready to explain policies to anyone who asks, and don't confuse policies with the procedures needed to carry them out.

Good policy is **consistent** with the Co-op Act, Rules, Occupancy Agreement and other co-op policies.

Finally, good policies work. They strike the right balance between the needs of members and the needs of the co-op. They are fair and reasonable. They respect the role of the members and the board in the structure of the co-op.

Making policy

Policies can start with:

- a suggestion made at a members' meeting
- a proposal from a committee
- an issue that comes up at a board meeting, or
- a recommendation from management.

Wherever it starts, a policy should go through the same steps:

Think about it. Do you need a policy? If only one or two members think there's an issue, a policy may not be the answer. Or if something will only come up every other year, perhaps it can be left to the board to decide.

Write it. A members' meeting cannot write a policy – not well anyway. Start with one person or a small group to write the first draft. Don't reinvent the wheel; start with the samples available from CHF BC or another co-op. Keep it simple. And don't mix procedures in with policies. For example, a pet policy can provide that pets be registered with the co-op, but it needn't include the registration form.

Review it. The board should review policies at this stage to make sure they meet the guidelines described above. If you wrote the first draft, don't be defensive. Every good idea can benefit from a second look. You will save time and effort at this stage with a careful review.



Discuss it. Once a policy is approved, members are bound by the Occupancy Agreement to follow it. So members deserve a chance to have input before anything is made final. Take draft policies to members' meetings for a good discussion. Circulate them before the meeting so members can think about the issues and prepare questions or comments. It almost always works best to discuss the policy at one meeting and approve of at the next.

Approve it. In some co-ops, the board approves policies. In others, members have final approval. Your Rules will set out who has the authority to approve policies. Make sure you follow your Rules for things like proper notice for meetings and the majority needed at the meeting to approve the policy.

Record it. Members, directors and management staff will need to refer to policies all the time. Keep a complete, up-to-date set of policies in a central place. When a new policy replaces an older version, replace it in the policy manual right away. The manual should be kept in a secure place, but members should have easy access to it (or to a copy).

Live by it. A policy that is not followed by members and enforced by the co-op is a waste of everyone's time and money. If you don't plan to enforce a policy, don't bother to make one in the first place. And if you do plan to make and enforce a policy, be sure that it meets the test of a good policy and improves the management of the co-op and its members' quality of life.