Sail Canada
Safe Sport

How to Use the Member Organization Template

Step 1
Open the Footer section – Insert your Organizations contact information (name, address, website) into the space allocated. Due to different sections, you may need to insert it more than once.

Step 2
Use Find and Replace Function to insert your organization's legal name into the document.

In word under Edit go to Find and scroll across to Replace
The panel will open at the side of the document – enter [ORGANIZATION NAME] (exactly how it appears in the template) in the first line. In the second line enter your legal name as it appears in policies.
Check the settings drop down (the wheel because the word Find) and ensure that there is no check mark beside Ignore Care to have it capitalized properly throughout the document.
Click on Replace All.

Review the document and make sure it flows at each placement of the PSA name.

Step 3
There are numerous places in the template that are highlighted – these I recognized may need to be altered for your organization – they reference for the most part roles such as President, make sure it is correct for your organization.

Step 4
Start to complete the top section of each policy as follows:
Effective Date - Date policy comes into effect
Initial Approved date – to be filled in when Board passes
Date Last Reviewed - When the Board last looked at it - in this case it will be the date it is passed.
Archived Date - when this policy is replaced with something else - leave blank while policy is active.
Replaces and/or Amends - This should contain the name of any policies that the new policy will replace, for example if you have a Code of Conduct currently for the organization then this Code of Conduct will replace that one, same with any other policies you currently have in these areas.
Appendix(-ces) to this Policy - This will contain the names of any appendices that are included with the policy,

While you do not have dates right now, it is important to assess what policies you currently have that are going to be replaced by this policy as you go through the process of archiving your old policies. Remember not to get rid of any of the old policies but to save them with the date on which they were replaced in case a historic complaint comes to light in the future.

<u>Step 5</u>
Have the Board (and senior staff if applicable) review the policy package.
Identify anything different from current practice that you will need to address in implementation.