

Whether you're a new society that needs to create a complete policy manual from scratch, or an established one whose policies need revising or better organizing, this series of policy template helps to make the process easier. The template is designed as a dynamic tool that provides users with options on a variety of topics that they can customize to develop their own policies and procedures, including financial management, administration, maintenance, and tenants.

To create your own policy manual:

Drafting

1. Review and discuss the policy points/provisions and select the ones you want to use from those provided.
2. Delete unwanted points and options.
 - a. Options separated by **OR** are mutually exclusive. Other points may be used in combination.
3. Add any original policy points of your own. Make sure they are consistent with your other choices.
4. Number the points accordingly.
5. Delete our instructions (any **boldface type** in the left column (column 1)).
6. Fill in:
 - a. The Name of your society (header)
 - b. The date the policy was passed (footer)
 - c. Policy or policies this one is replacing, if any, and their dates (footer)

Approval

7. Review the policy. Ask if the policy:
 - a) complies with applicable municipal, provincial and federal legal requirements;
 - b) addresses requirements from funders and other important stakeholders;
 - c) aligns with the society's tenancy agreement; and
 - d) includes points and procedures that the society can follow on a consistent basis.
8. Seek legal advice to review the complete policy manual and provide advice and recommendations.
9. Seek approval from the society's Board of Directors.
10. Set a schedule for reviewing policies (ex. annually) and determine who will be responsible for reviewing and updating policies.

DISCLAIMER:

While the BCNPHA is happy to provide this valuable policy template guide, it is not possible to anticipate the needs and obligations of each housing provider. As a result, each housing provider must carefully review and tailor all policies to meet the housing provider's specific needs. All references to laws in the policies are references to British Columbia law or Canadian federal law, as applicable. Each housing provider is responsible for reviewing its policies with legal counsel to ensure that the housing provider's policies are in compliance with all applicable legal requirements.

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