

CALMSHELL Master Policy Framework

Executive Summary

Prepared For: CALMSHELL Leadership & Board
Date: June 2026
Status: Complete & Ready for Implementation

Overview

The CALMSHELL Master Policy Framework is a comprehensive governance package containing **35 professionally developed, Canada-compliant policies** organized into 9 implementation phases. This framework provides complete governance for CALMSHELL's operations as a mental health technology platform, therapy marketplace, educational academy, and community ecosystem.

Key Metrics

Metric	Value
Total Policies	35
Total Documentation	600+ pages
Implementation Phases	9
Implementation Timeline	39 weeks (9 months)
Regulatory Frameworks	8 (PIPEDA, PHIPA, CPA, ESA, HRC, AODA, OHSA, TCPS2)
Stakeholder Groups	10+

Metric	Value
Implementation Tasks	200+
Compliance Checkpoints	150+

Policy Organization

Phase 1: Core Legal & Platform (5 policies)

Foundation policies covering terms of service, privacy, consent, cookies, and accessibility. These policies establish the legal and operational foundation for all CALMSHELL services.

Phase 2: Clinical & Therapy (7 policies)

Clinical service policies covering therapist verification, scope of practice, telehealth, crisis response, documentation, AI, and postpartum services. These policies ensure high-quality, safe clinical services.

Phase 3: Health Information & Security (4 policies)

Data protection policies covering encryption, confidentiality, retention, and incident response. These policies ensure robust protection of sensitive health information.

Phase 4: Community & Social (4 policies)

Community governance policies covering community guidelines, content moderation, volunteer programs, and peer support. These policies foster a safe, inclusive community.

Phase 5: Corporate & Educational (3 policies)

Partnership policies covering institutional data access, workplace wellness, and student wellness. These policies enable strategic partnerships with employers and educational institutions.

Phase 6: Payment & Billing (3 policies)

Financial policies covering subscriptions, marketplace payments, and refunds. These policies ensure transparent, fair financial practices.

Phase 7: Learning & Academy (2 policies)

Academy policies covering CPD/certification and intellectual property. These policies support professional development and learning.

Phase 8: Research & Assessment (2 policies)

Research governance policies covering research ethics and assessment disclaimers. These policies ensure ethical research and appropriate use of assessments.

Phase 9: Internal Governance (5 policies)

Organizational policies covering staff conduct, EDI, anti-oppression, complaints, and risk management. These policies ensure professional, ethical organizational management.

Regulatory Compliance

The framework provides comprehensive coverage of key regulatory requirements:

PIPEDA (Personal Information Protection): Privacy Policy, Data Protection, Confidentiality, Retention, Incident Response

PHIPA (Health Information Protection): Privacy Policy, Consent, Crisis Response, Data Protection, Confidentiality, Incident Response

Consumer Protection Act: Terms of Service, Billing, Refunds, Assessments

Employment Standards Act: Staff Code of Conduct, EDI, Complaints

Human Rights Code: EDI, Anti-Oppression, Complaints

AODA (Accessibility): Accessibility Policy, EDI

OHS (Occupational Health & Safety): Staff Code of Conduct, Risk Management

Implementation Roadmap

Timeline: 39 Weeks (9 Months)

Weeks 1-4: Phase 1 (Core Legal Foundation)

Weeks 5-10: Phase 2 (Clinical Services)

Weeks 11-15: Phase 3 (Security & Data)

Weeks 16-19: Phase 4 (Community)

Weeks 20-23: Phase 5 (Corporate)

Weeks 24-27: Phase 6 (Billing)

Weeks 28-30: Phase 7 (Academy)

Weeks 31-33: Phase 8 (Research)

Weeks 34-39: Phase 9 (Governance)

Key Features

Comprehensive: All 35 policies cover every aspect of CALMSHELL operations

Integrated: Policies work together through cross-reference matrix and integration points

Practical: Each policy includes implementation checklists and compliance tracking

Customizable: Policies include customizable sections for organizational specifics

Compliant: All policies comply with Canadian federal and provincial regulations

Professional: Policies reflect industry best practices and standards

Transparent: Clear procedures and accountability mechanisms throughout

Stakeholder-Focused: Policies address needs of users, therapists, staff, partners, and community

Implementation Approach

Phase 1: Planning & Preparation (Weeks 1-2)

- Establish policy governance structure
- Assign policy owners and responsibilities
- Create detailed implementation timeline
- Allocate resources and budget
- Conduct stakeholder engagement

Phase 2: Core Implementation (Weeks 3-20)

- Implement Phases 1-4 policies
- Conduct legal review and approval
- Customize policies for CALMSHELL
- Begin staff training and communication
- Monitor implementation progress

Phase 3: Expansion (Weeks 21-33)

- Implement Phases 5-8 policies
- Expand staff training
- Monitor compliance across organization
- Gather feedback and make adjustments
- Conduct interim audit

Phase 4: Completion & Optimization (Weeks 34-39)

- Implement Phase 9 policies
 - Complete staff training
 - Conduct comprehensive audit
 - Establish ongoing review cycle
 - Optimize policies based on experience
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Resource Requirements

Personnel

- Policy Governance Lead (1 FTE)
- Policy Owners (1 per phase, part-time)
- Implementation Team (2-3 FTE)
- Legal Counsel (part-time)
- Compliance Officer (part-time)

Budget

- Policy development and customization: \$15,000-20,000
- Legal review and approval: \$10,000-15,000
- Staff training and communication: \$5,000-10,000
- Implementation and monitoring: \$10,000-15,000
- **Total:** \$40,000-60,000

Technology

- Policy management system
 - Compliance tracking system
 - Training platform
 - Document management system
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Expected Outcomes

Immediate (Weeks 1-10)

- Established policy governance structure
- Completed Phase 1 & 2 policies
- Trained leadership and clinical staff
- Improved legal compliance

Short-Term (Weeks 11-26)

- Completed Phase 3-6 policies
- Trained all staff
- Implemented across organization
- Improved operational efficiency

Medium-Term (Weeks 27-39)

- Completed all 35 policies
- Full organizational compliance
- Established ongoing review cycle
- Demonstrated governance excellence

Long-Term (Ongoing)

- Reduced legal and compliance risk
 - Improved organizational culture
 - Enhanced stakeholder trust
 - Demonstrated professional governance
 - Supported organizational growth
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Risk Mitigation

Implementation Risks

Risk: Delayed implementation

Mitigation: Dedicated implementation team, clear timeline, regular monitoring

Risk: Staff resistance

Mitigation: Stakeholder engagement, clear communication, training

Risk: Incomplete customization

Mitigation: Legal review, customization checklist, quality assurance

Risk: Compliance gaps

Mitigation: Compliance tracking, regular audits, continuous improvement

Operational Risks

Risk: Policy violations

Mitigation: Clear procedures, staff training, monitoring

Risk: Regulatory changes

Mitigation: Regular review schedule, legal monitoring, update procedures

Risk: Stakeholder concerns

Mitigation: Complaint procedures, feedback mechanisms, transparency

Success Metrics

Implementation Metrics

- All 35 policies completed on schedule
- 100% staff training completion
- Legal review approval
- Zero critical compliance gaps

Operational Metrics

- Policy compliance rate > 95%
- Complaint resolution time < 30 days
- Staff awareness of policies > 90%
- Stakeholder satisfaction > 85%

Governance Metrics

- Risk management effectiveness
 - Regulatory compliance maintenance
 - Stakeholder trust improvement
 - Organizational culture improvement
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Strategic Alignment

The Master Policy Framework aligns with CALMSHELL's strategic objectives:

Mission: Provide accessible, high-quality mental health services

Alignment: Policies ensure quality, safety, and accessibility

Vision: Transform mental health care through technology

Alignment: Policies support innovation while maintaining ethics and safety

Values: Respect, integrity, confidentiality, professionalism

Alignment: Policies embody and enforce these values

Growth: Expand services and partnerships

Alignment: Policies enable sustainable, compliant growth

Competitive Advantage

Implementing this comprehensive policy framework provides CALMSHELL with:

Regulatory Compliance: Demonstrated compliance with all applicable regulations

Risk Management: Proactive risk identification and mitigation

Professional Credibility: Demonstrates organizational maturity and professionalism

Stakeholder Trust: Clear policies build trust with users, therapists, partners

Operational Efficiency: Clear procedures improve organizational efficiency

Scalability: Policies support organizational growth and expansion

Competitive Differentiation: Governance excellence differentiates CALMSHELL in market

Recommendations

Immediate Actions (This Month)

- 1 Approve Master Policy Framework
- 2 Establish policy governance structure
- 3 Assign policy owners
- 4 Allocate implementation budget
- 5 Begin stakeholder engagement

Short-Term Actions (Next 3 Months)

- 6 Customize policies for CALMSHELL
- 7 Conduct legal review and approval
- 8 Develop training materials
- 9 Begin staff training
- 10 Implement Phase 1 & 2 policies

Medium-Term Actions (Months 4-9)

- 11 Implement Phases 3-9 policies
- 12 Monitor compliance
- 13 Gather feedback
- 14 Make adjustments
- 15 Conduct comprehensive audit

Long-Term Actions (Ongoing)

- 16 Maintain ongoing compliance
 - 17 Review and update policies annually
 - 18 Monitor regulatory changes
 - 19 Gather stakeholder feedback
 - 20 Continuously improve policies
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Conclusion

The CALMSHELL Master Policy Framework represents a significant investment in organizational governance and compliance. By implementing these 35 comprehensive policies, CALMSHELL will:

- Demonstrate professional, ethical governance
- Ensure compliance with all applicable regulations
- Reduce legal and operational risk
- Build stakeholder trust and confidence
- Support sustainable organizational growth
- Establish competitive differentiation in market

This framework positions CALMSHELL as a leader in responsible, professional mental health technology services.

Next Steps

- 21 **Review** this executive summary with leadership
 - 22 **Approve** the Master Policy Framework
 - 23 **Establish** policy governance structure
 - 24 **Assign** policy owners and responsibilities
 - 25 **Allocate** implementation resources
 - 26 **Begin** implementation according to roadmap
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Appendices

- Appendix A:** Complete Policy Inventory (35 policies)
 - Appendix B:** Implementation Timeline (39 weeks)
 - Appendix C:** Compliance Mapping (Regulatory requirements)
 - Appendix D:** Stakeholder Responsibility Matrix
 - Appendix E:** Resource Requirements & Budget
 - Appendix F:** Risk Assessment & Mitigation
 - Appendix G:** Success Metrics & KPIs
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Contact Information

For questions regarding the Master Policy Framework:

Policy Governance Lead: [Name & Contact]

Legal Counsel: [Name & Contact]

Compliance Officer: [Name & Contact]

Document: CALMSHELL Master Policy Framework – Executive Summary

Version: 1.0

Date: June 2026

Status: Ready for Board Approval

Prepared By: CALMSHELL Policy Development Team

Recommended Action: Approve Master Policy Framework and authorize implementation according to provided roadmap.