



# ADMINISTRATIVE POLICY MANAGEMENT



# FOR DISCUSSION



Project Scope



Discovery Process & Findings



Key Deliverables



Recommendations



Return on Investment





# PROJECT SCOPE

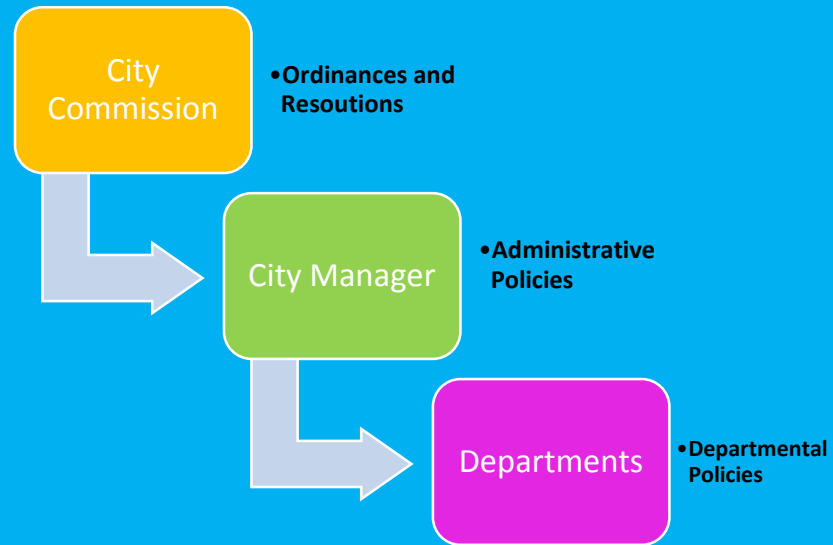
Review the City's current administrative policy management process as it pertains to policy life cycle; identify opportunities; and provide recommendations for overall process improvement.

## **Exclusions**

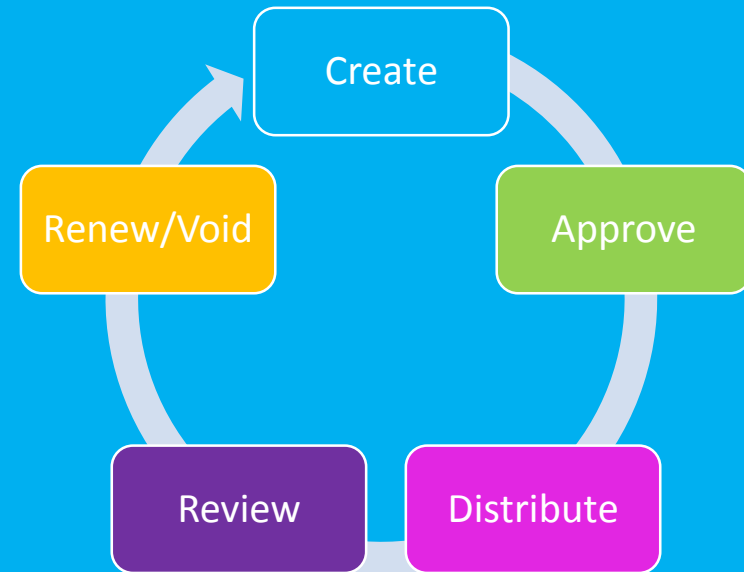
Police General Orders and Departmental Policies

# DISCOVERY PROCESS

## 1. City's Governance Hierarchy



## 2. Policy Lifecycle





# DISCOVERY PROCESS

## Steps

### 3. Document Search

With assistance from the Innovation Technology Department and the City Manager's Office, administrative policy documents were retrieved from current locations and placed in a temporary central location for review.

### 4. Review of Existing Policy Index

Indexes are available by department and by subject. Policies are manually added or marked "voided" as they are created or become obsolete.

### 5. Technology Assessment

At the present time, the Administrative Policy Management process is a manual process. Technology is limited to the use of Word and Adobe PDF applications for the development of policy documents. Use of existing technology is not currently used for collaboration, dissemination, version control, workflow, and archiving.

### 6. Best Practice – Online Publishing

An online search for municipal administrative policy internet sites, anywhere in the State of Florida, was conducted. This search showed only five cities that published their general administrative policies for public access in the internet. These included: City of Coral Springs, City of Largo, City of Melbourne, City of Miami, and City of Orlando.

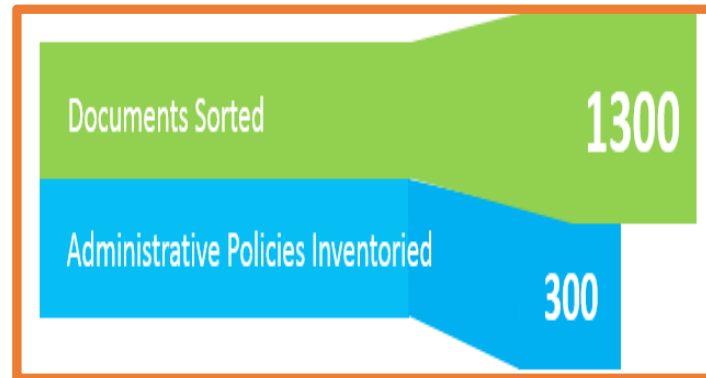
# OPPORTUNITIES

- File **accessibility** to a common single-source location
- Collaborative platform and a **central repository** of documents (intranet site)
- Elimination of **Manual process** and paper files (writing, workflow, updating, version control, voiding, dissemination)
- Design of a **Standardized Template**
- Establish **periodic/systematic update** of documents
- Implement **historical audit** logs of each administrative policy
- Publish a **revised/updated guiding document** to establish administrative policies
- Use of **document management technology** to manage the policy lifecycle



# KEY DELIVERABLES

## Policy Inventory



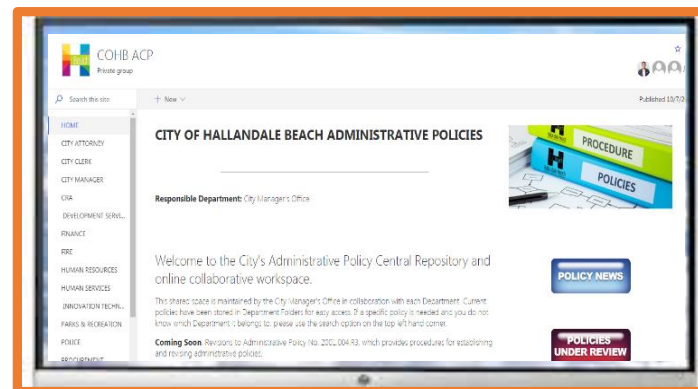
## Revised Governance Document

**Hallandale Beach**  
PROGRESS. INNOVATION. OPPORTUNITY.  
**CITY OF HALLANDALE BEACH**  
**ADMINISTRATIVE POLICY**

**APPROVED**  
Nydia Rafols-Sallaberry, Interim City Manager  
**Establishing Administrative Policies**  
Policy Owner: \_\_\_\_\_ City Manager

Date of Issue  
April 22, 1982  
Effective Date  
April 22, 1982  
Revision/Review Date  
September 17, 2018  
Policy-Version Number  
2001.001.R4

## Centralized Repository



## Biennial Comprehensive Review







**Automation of  
Administrative Policy  
Management Process**

**04/19**

**Directors Meeting  
to Roll Out  
Comprehensive  
Administrative  
Policy Review  
Process**

**11/18**

**02/19**

**Completion of  
First Citywide  
Comprehensive  
Review Process**

**10/18**

**Designate  
Departmental Policy  
Liaisons and Schedule  
Training**

# RECOMMENDATIONS

## Departmental Policy Liaisons and Training

It is recommended that each department designate a Departmental Policy Liaison to act as the point of contact for all Administrative Policy related matters. It is also recommended that training be provided to Liaisons to review the new governance document and related forms in preparation for a Citywide Administrative Policy Comprehensive Review Process.

## Biennial Comprehensive Review Process

The City has reviewed administrative policies on an as needed basis. To ensure continued applicability of administrative policies to current City operations, the implementation of the proposed Biennial Comprehensive Review is recommended starting in FY 2018/2019 and every other year thereafter.

## Policy Process Automation – Technology Enhancement

The use of technology and software to eliminate manual processes is highly recommended. Software such as Convergepoint, which is compatible with Sharepoint, can automate the entire policy lifecycle and provide data integrity, automated version control, electronic workflows, document storage, real-time dashboards, role based access, expiration notifications, alerts, and search and report capabilities.





ROI

## Paper Costs Savings

Average paper savings of \$9,775

## Efficiency

Staff Time Savings

## Clear Expectations Employee Engagement

Cultivate and maintain culture

Increased Productivity

# QUESTIONS