Report to: Overview Committee

Date of Meeting 27th March 2025

Document classification: Part A Public Document

Exemption applied: None

Review date for release N/A

Policy review project

Report summary:

This report summarises the findings and recommendations from the policy management review conducted between September 2024 and February 2025. During this period, we engaged with various stakeholders, including ELT and SLT members, digital services, and officers involved with policies.

The review revealed that EDDC's policy storage is fragmented, making it difficult to access policies and manage version control. To address this, the report recommends improving and centralising the existing policy storage on the Intranet and the policy register to ensure accessibility and reliability. Additionally, options such as MyCompliance and InPhase should also be considered to enhance the efficiency of policy management. The report also suggests streamlining and combining some policies for greater efficiency, clarifying policy management responsibilities, improving policy training, and defining the authorisation process.

Is the proposed decision in accordance with:

Budget   Yes ☒ No ☐

Policy Framework   Yes ☒ No ☐

Recommendation:

That Committee notes the work undertaken to review our policy adoption and review procedures, resulting in changes to our policy template and policy management processes, as set out in this report.

Reason for recommendation:

To inform the Committee of the changes to our policy management processes.

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Portfolio(s) (check which apply):
☐ Climate Action and Emergency Response
☐ Coast, Country and Environment
☒ Council and Corporate Co-ordination
☐ Communications and Democracy
☐ Economy
☐ Finance and Assets
☐ Strategic Planning
☐ Sustainable Homes and Communities
☐ Culture, Leisure, Sport and Tourism

Equalities impact Low Impact

If choosing High or Medium level outline the equality considerations here, which should include any particular adverse impact on people with protected characteristics and actions to mitigate these. Link to an equalities impact assessment form using the [equalities form template](#).

Climate change Low Impact

Risk: Medium Risk; We need to ensure that policies are properly maintained and effectively managed to ensure compliance with them.

Links to background information .

[Policy template](#)

[Policy review checklist](#)

[Policy approval procedure](#)

[Policy review process map](#)

[Draft Equality Relevance Assessment.](#)

Link to [Council Plan](#)

Priorities (check which apply)

☐ Better homes and communities for all
☐ A greener East Devon
☐ A resilient economy

Report in full

Project overview

This project aimed to improve policy management at EDDC by reviewing the approach to the development, approval, implementation, and monitoring of policies. The conducted research indicates that a revised approach is crucial for ensuring compliance with legislation, the Equality Duty, and audit recommendations.

Project timeline

The project plan was agreed in August 2024 and work commenced in September 2024.

Project stages:

1. Initial research: Compared policy management practices with other councils, reviewed LGA resources, considered the potential of AI, and collated an extended version of the policy register.
2. Stakeholder meetings: Held meetings with all ELT and SLT members, and a wide range of officers involved in policy work.
3. Process mapping: Worked with the Process Improvement Analyst to create a [policy review process map](#).
4. Guiding documents and templates: Developed templates and guidance documents, including a [policy template](#), a [policy review checklist](#), a [policy approval procedure](#), an ethical policies statement, a policy gaps spreadsheet, and a policy responsibilities document.
5. Findings and recommendations: Compiled all findings and recommendations, with the key points listed above.

Project outcomes and actions

The project successfully achieved all planned outcomes, primarily by providing resources rather than directly completing tasks. The planned outcomes and recommended actions are listed below:

Planned project outcome	Recommended action
All organisational policies reflect external and internal requirements.	A revised approach to policies, facilitated through the new [template](#) and [checklist](#), [policy review process map](#), [policy approval procedure](#), and the signposting to [equality forms](#).
There is a shared understanding of the policy approach, including the approval and compliance process and use of a new, agreed policy template	
There is clarity about who is responsible for the content and review of each policy.	Policy responsibilities clearly listed on the improved policy register. Having a designated policy sponsor and a policy owner for each policy.
Policies are easy to access in a shared and secure space which also includes related guidance, support and templates.	Updated Intranet folders and policy register, with corporate oversight.
Policies are appropriately disseminated to councillors and employees and externally, as required.	Improved communication through policy sections in Stay Connected and the members newsletter, services' Teams channels, and manager check-ins. The new template also requires indicating if the policy needs to be publicly accessible on the Internet website.
There is clarity about what training and other support is in place to support policy compliance and all councillors and employees utilise this support and training, with appropriate monitoring arrangements in place to ensure employee and member compliance.	Enhanced protection of the first two weeks of employment for mandatory training, with the potential for more interactive training through the use of informational videos. Adoption of MyCompliance or InPhase for monitoring policy engagement and signing the Code of Conduct.
There is an effective monitoring system in place for the review of all policies, with regular reporting of the policy register to ELT/SLT.	Quarterly review of the policy register by SLT and a standing agenda item about policies.

Future considerations and next steps

We are planning to roll out the new policy template and processes starting in April 2025, after consulting with the Communications team to ensure the documents follow EDDC's corporate branding standard.

Financial implications:

There are no direct financial implications arising from the report.

Legal implications:

There are no substantive legal issues to be added to this report (KW/002512 11/3/25).