

# ATDSFL Champions of Learning Best Practices Submission Form

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**Q1 Organization (as printed on certificate):**

Clerk & Comptroller, Palm Beach County

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**Q2 Project/Initiative Title:**

One Stop Ops (OSO)

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**Q3 Name of Person Submitting:**

Linda Chapman

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**Q7** Write a brief summary of your project/initiative. Please limit your response to between 150 and 200 words.

With 450 employees in approximately 30 job descriptions and performing over 1000 processes at 6 different locations, it was recognized that a single repository of data for best practices, procedures, user guides, training video and other critical documents for the Operations Division was required to support employee success. Moreover, the organizational culture supports promotions from within which allows employees to grow into other job roles and learn new functions. In 2008, the Clerk and Comptroller's office performed a study and recognized that significant time was spent on on-the-job training and that this was no longer an efficient way to train. A project was instituted and piloted called the Operations Training department where a group of trainers delivered standard training of procedures to every Operations new hire who joined the organization. The results of that project were shorter training times for new hires or transfers to reach proficiency, better training for large systems projects, standardization of Operations procedures, few processing errors and greater employee satisfaction. One Stop Ops, a central resource for training guides, procedures and documents was a natural second phase for the Operations Training and Development project. The resource was launched in December 2017.

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**Q8** What was the business/organizational need that led to this initiative? Please limit your response to between 150 and 200 words.

With over 1000 processes and some employees who have made a career in excess of 30 years with the Clerk's office, there were documents in several disparate locations. Some employees documented their own procedures. Supervisors updated department procedures and kept these on local hard drives. Some procedures were on common server drives, in desk drawers, pinned up in the employee's cubicles or even written out on ruled legal pads; team members printed procedural documents and added updates by hand keeping them at their desks. Of course, these practices led to inaccuracies, missed efficiencies where an employee may have found a better way to accomplish a task or a task may have been updated and staff was unaware because they were using an old printed procedure on their desk. Furthermore, new team members had a difficult time when trying to learn the flow of work in their new department especially when they received documents for the same procedure that were different; and old codes that were out of use were still entered into systems by tenured employees. It was clear that a standard central resource was needed.

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**Q9** What actions did you take that led to the success of this initiative? Please limit your response to between 400 and 500 words.

The Civil Operations Director proffered the idea to have a resource that functioned like Pinterest - a Pinterest for Clerk Operations. "Everyone uses and loves Pinterest", she said. The IT and Training departments collaborated to find a tool that would allow the construction of a knowledge bank with all information that was used in the Operations Division. A decision was made to use Microsoft SharePoint as the tool to host the resource. The project started in the Civil Division where we had the support of the Civil Director to spearhead the gathering of data required. Samples of all procedures, documents, user guides, codes, forms and contact information were collected and then logically grouped and organized. A topology was built out in SharePoint that mirrored the categories identified in the sample. Using an iterative process that allowed users to review the tool at frequent intervals allowed quick acceptance by users at the end of the process. While the build out was taking place, a designated team of users was gathering all the documents and reviewing them for accuracy. Duplicates were removed and after several meetings, documents were provided to load into the SharePoint libraries. Documents were added and pilot resource was tested for several months to analyze usage and iron out any kinks that the users found. Within two months, work commenced on the Criminal Division following the same process and then finally for Official Records and the support departments. The Civil team was able to share their experience with the Criminal group to allow work to progress faster. Key to success of the project was the use of pictures or icons that would be meaningful but fun for users. The resource was designed to have a "Pinteresty" feel. More importantly, the premise was that when a user transferred to another department, finding documents would be just as easy because the same icons were used to represent each category or library. Training document and videos were added so that all documentation resides in one place. Initial documents were loaded by the resource creators in Operations Training. To maintain the libraries over time, each department selected a lead or SME to be responsible for maintaining their department's documents. Shared documents are linked in a Common Documents folder so that versions remain consistent from department to department. In new hire training, participants are introduced to One Stop Ops and discouraged from printing procedures so that they always access the most current version.

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**Q10** What outcomes resulted from your initiative and how did you measure them? Please limit your response to between 250 and 300 words.

Several anticipated and a few unanticipated outcomes resulted from this project. Our quality assurance team reports fewer errors in court records in the case management system. Significant savings have accrued from reduced financial outlay for paper and printer consumables. Documents are all accessed online and are no longer printed. Statutory updates and other procedural changes are immediately available to users.

Supervisors are easily able to locate the most recent versions of documents relating to their work and new supervisors get up to speed more quickly.

Employees are better empowered to find solutions to issues that may arise because One Stop Ops is at their fingertips. Like its name suggests, all documentation is available in the same place. Procedures are performed consistently from location to location. Training request forms, course listings and training outlines are easily accessible to managers and supervisors allowing a self serve approach to training.

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**Q11** What information would be vital for other organizations to know if they wanted to replicate your initiative? Please limit your response to between 250 and 300 words.

Critical to the success of this project was the cooperation between IT and Operations Training. The Chief Operations Officer was the project sponsor which gave the project credibility. The involvement of the Civil Operations Director provided staff with an example to follow and her support was crucial. Providing training on the resource from a user perspective as well as a support perspective gives the Operations team ownership and management of their information. Access to the SharePoint software or a comparable resource is an obvious requirement.

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