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## NAVEX Customer Success Story

# PolicyTech® Enables Streamlined Communication and Centralized Policy & Procedure Management

"A lot of our challenges were silos between departments and transparency. Before PolicyTech was implemented, team members had documents on the same topics unknown to others and now we can easily see who is working on what and avoid duplicate work."

**Michelle Eggers**

*Data and Program Analyst, St. Joseph's Indian School*

## Highlights



**INDUSTRY**

**Non-profit,  
School**



**NUMBER OF  
EMPLOYEES**

**350**



**CHALLENGE**

Decentralized policies and procedures created inefficiencies, version control issues and duplicative work



**SOLUTION**

Centralized management streamlines communication and compliance

## Solution

**SINGLE-PRODUCT**

**PolicyTech®**

**POLICY & PROCEDURE MANAGEMENT**

## About St. Joseph's Indian School

St. Joseph's Indian School is a non-profit residential school for Native American students first through twelfth grade. Operating for nearly 100 years, year-round, the school provides education, health care, counseling, and other related residential services at no cost to families and students. Located in rural Chamberlain, South Dakota, students attending St. Joseph's represent the tribes of the Great Plains Region and most are affiliated with the Lakota, Dakota, and Nakota tribes.

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### Challenge:

Before implementing PolicyTech, St. Joseph's relied on personal drives, shared drives, and binders containing the various policies and procedures.

"We had instances of version control issues. For example, someone could email a policy as an attachment to a document, then everyone would save the same version to their own drive, or a shared folder and we would not know when it was updated last or who had the most current version," said Michelle Eggers, data and program analyst at St. Joseph's Indian School.

St. Joseph's also faces some unique policy challenges given the specific nature of their organization.

"There are not many cookie-cutter options out there for policies and procedures. Even with help from HR and compliance, creating policies has been a challenge for us – but having software that helps us at least be congruent across all of our departments has helped in creating templates," said Eggers.

"A lot of our challenges were actually silos between departments and transparency. Before PolicyTech was implemented, team members were working on the same thing, and we didn't even know. Now we can easily see who is working on what and avoid duplication."

### Solution:

St. Joseph's operates 24/7 during most months of the year with students and staff onsite at all times; because of the "always on" nature of the organization, having quick access to policy and procedure is critical, especially in the case of medical and mental health events. The quick access is key for when staff members need to act immediately.

Much like operating in a healthcare environment or similar, quick access to necessary information can help employees make decisions and act without hesitation. "We always have people who are on-call at a moment's notice to come in. It has been phenomenal with PolicyTech to be able to search needed procedures on your phone. You don't have to quickly run to your office to try to find a file to print, find a paper copy somewhere or carry a binder with you when you're on-call, it's just so much easier to access on your phone," said Eggers.



**PolicyTech®**

**POLICY & PROCEDURE MANAGEMENT**

PolicyTech enables organizations to improve efficiency and provide employees with easy access to all the policies and procedures that they need. Healthcare, financial, life sciences and industrial manufacturing organizations all use PolicyTech to easily run audit-ready reports, keep documents up-to-date, and manage risk across their organization.

One of Eggers' favorite features is the Properties Wizard functionality which allows her to work behind the scenes to link documents together, and to insert updates to templates so when program updates occur the information is automatically and accurately adjusted. The search feature within PolicyTech also proves useful during leadership meetings, allowing for convenient and quick access to documents in real-time – without the hassle of searching in multiple drives or through paper copies.

“Staff will pull up PolicyTech to read excerpts within documents during meetings. They're that confident to search for policies during the middle of their meeting, knowing all it takes is a quick search to find the answer,” she said.

### **Results:**

PolicyTech is an integral part of the culture of ethics and transparency at St. Joseph's, allowing them to consistently execute on their mission as an apostolate of the Congregation of the Priests of the Sacred Heart, to partner with Native American children and families to educate for life–mind, body, heart, and spirit. Families who choose to send their children to St. Joseph's Indian School appreciate the opportunities and better education that the school provides; however, it can be a difficult decision to send their children into the care of others for a length of time. PolicyTech reassures them that while their children are away from home, they will receive consistent care across the continuum of settings in the residential system: school, campus residence, health care, recreation, local community and on excursions away from campus.

From a compliance perspective, PolicyTech improved their documentation, allowing them to formally pass down institutional knowledge of their tenured staff and ensuring consistent application of policy.

PolicyTech is currently being used by about half of the organization with plans to roll out to the remainder in the coming months. With increased use and adoption, the goal is to continue streamlining communication regarding policies and ensuring that all staff are able to easily access information needed to pursue their mission.

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