

**TO: ALL COUNTY PERSONNEL**

**FROM: VERDENIA C. BAKER  
COUNTY ADMINISTRATOR**

**PREPARED BY: COUNTYWIDE PPM STANDARDIZATION COMMITTEE  
(PPM COMMITTEE)**

**SUBJECT: POLICIES AND PROCEDURES MANUAL (PPMs)**

**PPM #: CW-O-001**

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**ISSUE DATE**  
**April 9, 2025**

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**EFFECTIVE DATE**  
**April 9, 2025**

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**PURPOSE:**

To establish a process for the County Administrator to promulgate Countywide policies and procedures and to establish guidelines for the preparation, consistency in formatting and maintenance of policies and procedures manual for County departments and offices under the County Administrator's authority.

**UPDATES:**

Future updates to this PPM are the responsibility of the PPM Committee.

**AUTHORITY:**

- Board of County Commissioner's Resolution No. 1, adopted July 18, 1967, establishing the Office of County Administrator, as may be amended
- Palm Beach County Administrative Code, Section 101.00, as may be amended

**POLICY:**

**General**

1. The County Administrator, all department directors, all division directors, and all heads of separate offices shall issue and maintain Policies and Procedures Manual (PPMs). These PPMs will be used to promulgate standard policies and procedures for all areas of operation under the control of the issuing department or office. No PPM shall be in conflict with or be inconsistent with a PPM issued by a higher organizational level, Board of County Commission (BCC) policy, or federal, state, or county law, regulation or ordinance.

The PPM Committee is established as a working group to assist County Administration in ensuring the consistency of format and content and understandability of Countywide PPMs. The PPM Committee Guidelines are outlined in **Attachment A**.

2. Department and office directors (department heads) are expected to ensure that their staff is aware of and complies with established policies and procedures.
3. Policies and procedures having Countywide application will be issued by the County Administrator's Office. Countywide PPMs provide direction and information for efficient and effective operation and management of the County. Countywide PPMs apply to all County departments and offices. Countywide PPMs are permanent in nature and remain in effect until amended by subsequent PPMs or rescinded.
4. PPMs shall be kept current, and department heads must review Countywide PPMs they are responsible for at least every **five** years.
5. County departments and offices that receive any type of revenue must issue one or more PPMs describing the procedures for collecting, receiving, accounting for, safeguarding, and transferring or depositing such revenues.
6. All department heads should submit Countywide PPMs, which will improve management and operational procedures within the County.
7. All Countywide PPMs must be signed by the County Administrator. The original signed copy of the Countywide PPM shall be maintained as directed by Administration, with a signed version by the County Administrator posted on the County's website. Additional distribution of signed Countywide PPMs will be at the discretion of the County Administrator.
8. Countywide PPMs are applicable to all employees under the control of the County Administrator. Unless otherwise directed the BCC, the County Attorney, the Internal Auditor, and their respective staffs are not subject to directives promulgated by the County Administrator. However, they are encouraged to adopt the County Administrator's policies and procedures for uniformity and efficiency.

**Structural Format for Countywide PPMs:**

1. All new and revised PPMs shall be prepared using the approved County standard document software in effect at the time of preparation.
2. All Countywide PPMs will be numbered and titled for ease of filing, reference, and use. The first two characters for Countywide PPMs shall be "CW"; the third character shall be an alphabetic character indicating the general subject area of the PPM as follows:

- O** - Operations
- P** - Personnel
- F** - Finance and Budget
- L** - Logistics (supplies; equipment; facilities; procurement; maintenance; transportation)
- R** - Records

The fourth, fifth, and sixth characters shall be Arabic numerals. This PPM (“CW-O-001”) provides an example of the required numbering system.

3. The “Issue Date” shall be the date that the new or revised PPM is signed by the County Administrator, which may be earlier than the effective date. The “Effective Date” shall be the date that the new or revised PPM is to take effect.
4. For revised PPMs, the last page of the PPM shall indicate a history of revisions as shown in the lower left of the last page of this PPM.
5. Each page of the PPM shall be numbered in the lower right of each page as shown below (“CW-O-001/Page 3 of 6”).
6. Any attachments, including forms to be completed, will indicate in bold type the letter designation of the attachment at the top center of the first page followed on a separate line(s) by the title of the attachment, as shown below:

**ATTACHMENT A**  
**PPM Committee**  
**Guidelines**

7. Attachments/forms will indicate the PPM number in the lower right hand corner of the attachment, followed by its letter designation and page number within the total number of pages in the attachment (e.g. “CW-O-001/Attachment A/Page 1 of 3” would indicate the first of three pages of Attachment A for CW-O-001).

The month and year the attachment/form was created or revised must be shown in the lower left hand corner of the first page of the attachment (e.g., “09/1995” which would indicate that September of 1995 was the date the attachment/form was created; and “Rev. 01/2009” would indicate the date the attachment/form was revised).

8. Lengthy attachments are discouraged, especially if they are subject to frequent changes. When appropriate, the use of embedded hyperlinks is encouraged in lieu of attachments. Should an attachment require revision, without alteration to its corresponding PPM, the department shall first obtain approval from the County Administrator and then provide the approved attachment to the PPM Committee Coordinator (Coordinator) for posting.
9. Each Countywide PPM shall have the following sections:

**Purpose** - communicates why the PPM exists, begins with the word “To”.

**Updates** - establishes who is responsible for the PPM. This will generally be the department head most involved in implementing or enforcing the provisions of the PPM.

**Authority** - identifies source of policy or procedures being established in the PPM. Examples of authority include the County Administrative Code; Board or County Administrator directives; specific requirements of law; appropriate, relevant reference documents such as industry specific regulation; and other references as appropriate. Reference to an authority should be as specific as possible and include “as may be amended”. Authority should be listed by order of precedence (i.e., federal, state, local)

**Scope** - optional, to differentiate from similar-appearing PPMs, to identify which department/office the PPM applies to.

**Definitions** - used to explain specific terms in the PPM which may not be generally understood or which have a particular or narrow meaning. This section may be omitted if there are no words or terms used in the PPM which need to be defined. Where the definitions section exceeds one page in length, the information must be placed as the first attachment of the PPM, with the following placeholder statement in the body of the PPM: “Refer to **Attachment A** for a listing of definitions related to this PPM.”

**Background** - optional, to provide proper context for PPM.

**Policy** - establishes the desired action(s) or outcome(s) for the PPM.

**Responsibilities** - optional, to provide overview of responsibilities identified throughout the PPM.

**Procedure** - details the steps or actions necessary to implement the Policy.

Instructions concerning the content of a PPM and a template of a formatted blank PPM are included as **Attachment C**.

10. Information which may be subject to frequent change, such as contact information, should not be used in Countywide PPMs.

## **PROCEDURES:**

### **Countywide PPMs:**

#### **1. New PPMs**

A department head who issues a Countywide PPM shall submit the proposed PPM to the Coordinator.

- a. The proposed PPM will be provided to the PPM Committee for review. The proposed PPM will also be provided to other departments/offices for review, if deemed appropriate by Administration or the PPM Committee.

The Coordinator will provide feedback to the initiator of the proposed PPM.

- b. The initiator of the proposed PPM shall be responsible to meet with the PPM Committee to discuss the content of the proposed PPM and revise the proposed PPM as appropriate.
- c. The Coordinator shall provide a recommended final version of the proposed PPM to the County Administrator for review, approval and signature.
- d. The Coordinator will post a copy of the final signed PPM, along with revised indexes, to the County's website, and send department heads an e-mail notification of the issue and effective date of the new PPM.

## **2. Revised PPMs**

When a revision to an existing Countywide PPM is requested, the department or office that prepared the original PPM shall submit the revised PPM accompanied by an interlineated version depicting the proposed changes to the Coordinator. The interlineated version is not required if the revised PPM constitutes a complete rewrite of the PPM being revised.

The review and distribution process for revised PPMs is the same as that for new PPMs, unless the proposed changes are non-substantive in nature (i.e. formatting and grammatical) In such cases, these PPMs will be reviewed by the Committee and then provided by the Coordinator to the County Administrator for review and signature.

## **3. Index/Appendix**

The index and appendix located on the County's internal and external websites shall include a column showing the date of the last revision and the next scheduled review date. Departments/offices should periodically compare their Countywide PPMs to the index/appendix to ensure that their Countywide PPMs contain the latest revisions.

## **Departmental PPMs:**

1. Each department, division, and office shall maintain a set of Countywide PPMs, and a set of PPMs applicable to itself, such as department or division PPMs. Departments are encouraged to use memoranda, desk guides, Standard Operating Procedures (SOPs), checklists, or other forms of supervisory directives, as they deem appropriate.

3. PPMs for departments, divisions, and offices should conform to the format described above for Countywide PPMs. Instead of "CW", the first two or three characters should be the original letter codes adopted by the department/office. Sample codes are outlined in **Attachment B**, departments can implement/revise as needed.

  
**VERDENIA C. BAKER**  
**COUNTY ADMINISTRATOR**

**Supersession History:**

1. Administrative Order #1-1, dated 05/1976 & 08/1987
2. PPM# CW-O-001, effective 07/01/1988
3. PPM# CW-O-002, effective 07/01/1988 (rescinded 10/16/1995)
4. PPM# CW-O-001, effective 10/16/1995
5. PPM# CW-O-001, effective 02/25/2010
6. PPM# CW-O-001, effective 02/08/2011
7. PPM# CW-O-001, effective 02/01/2012
8. PPM# CW-O-001, effective 07/21/2017
9. PPM # CW-O-001, effective 08/21/2018

## ATTACHMENT A

### PPM Committee Guidelines

1. **AUTHORITY.** County Administrative Code, Section 101.00 and PPM CW-O-001.
2. **PURPOSE.** Review of Countywide PPMs for consistency of format and content, and understandability. When reviewing PPMs from a Countywide perspective, the Committee recommends to the County Administrator the eliminating, continuing or updating of PPMs. The Committee also recommends to the County Administrator the need to submit PPMs for full review by County departments and offices, limited review or no additional review.
3. **MEMBERSHIP.** The committee is composed of the following: the Director of Office of Financial Management & Budget (OFMB) or designee; the County Attorney or designee; the Chief Information Officer (ISS) or designee; the Director of Human Resources (HR) or designee; the Director of Public Affairs or designee; and the PPM Committee Coordinator. The County Administrator shall appoint a liaison or designee from Administration to the Committee, who shall serve as an “ex officio” member of the Committee.
4. **MEETINGS.** Committee meetings will be held as notified at a designated location. The Committee will meet at a minimum of four (4) times per calendar year, or as needed. The Coordinator shall be responsible for arranging meeting schedules and notification to the members.
5. **AGENDA.** The Coordinator shall be responsible for preparing a listing of all items to be considered by the Committee for a given meeting.
6. **ACTION BY COMMITTEE.** The Coordinator shall be responsible for following up on any action taken by the Committee.
7. **ADMINISTRATION.** The Coordinator will send notification of PPMs due for review to each department and advise the County Administrator of the status annually.
8. **APPROVAL OF GUIDELINES.** These guidelines were recommended unanimously by the Committee members. Changes or amendments to these guidelines must be approved by the Committee and the County Administrator.

Revised 06/06/2024

**Attachment B**  
**Sample List of Departmental PPM Codes**

|  |      |
|--|------|
| Airports   |      |
| Administration & Finance   | AF   |
| Operations   | AO   |
| Maintenance  | AM   |
| Planning & Development   | APD  |
| Community Services   |      |
| Administration & Fiscal  | CS   |
| Human Services & Community Action Program                          | HS   |
| Senior & Veterans Services   | SS   |
| Cooperative Extension  | CES  |
| County Administration  |      |
| Countywide Procedures  | CW   |
| Office of the County Administrator                                 | CA   |
| County Attorney  | AT   |
| County Library   |      |
| Operations   | CL-O |
| Personnel  | CL-P |
| Finance & Budget   | CL-F |
| Logistics  | CL-L |
| Records  | CL-R |
| Engineering & Public Works   |      |
| Departmental/Administration Services/Office of the County Engineer | ED   |
| Construction Coordination  | EC   |
| Land Development   | EL   |
| Road & Bridge  | EB   |
| Roadway Production   | ER   |
| Streetscape  | SS   |
| Traffic Engineering  | ET   |
| Environmental Resources Management                                 | ERM  |
| Operations   | EV-O |
| Personnel  | EV-P |
| Finance & Budget   | EV-F |
| Logistics  | EV-L |
| Records/Reports/Files  | EV-R |
| Miscellaneous  | EV-M |

|                                      |      |
|--------------------------------------|------|
| Facilities Development & Operations  |      |
| Administration & Fiscal              | FF   |
| Capital Improvements                 | FC   |
| Electric Services & Security         | FE   |
| Facilities Management                | FO   |
| Fleet Management                     | FT   |
| Property & Real Estate Management    | FP   |
| Financial Management & Budget        |      |
| Financial Management                 | FM   |
| Contract Development & Control       | FC   |
| Administration                       | FA   |
| Budget                               | FB   |
| Fire Rescue                          |      |
| Administration                       | FR-A |
| BOSS                                 | FR-B |
| Communication Center                 | FR-C |
| Finance                              | FR-F |
| Health & Wellness                    | FR-H |
| Medical Services                     | FR-M |
| Operations                           | FR-O |
| Support Services                     | FR-S |
| Training                             | FR-T |
| Housing & Economic Development       | HED  |
| Human Resources                      | HR   |
| Information System Services (ISS)    | ISS  |
| Internal Auditor                     | IA   |
| Medical Examiner                     | ME   |
| Office of Equal Business Opportunity | OEBO |
| Office of Resilience                 | OR   |
| Palm Tran                            |      |
| Administration & Fiscal              | PF   |
| Maintenance                          | PM   |
| Transportation                       | PT   |

|                                      |       |
|--------------------------------------|-------|
| Parks & Recreation                   | DO    |
| Aquatics                             | AQ    |
| Financial & Support Services         | FS    |
| Golf Operations                      | GO    |
| Jim Brandon Equestrian Center        | JB    |
| Morikami Museum and Japanese Gardens | MM    |
| Parks Maintenance                    | PK    |
| Recreation Services                  | RD    |
| Revenue                              | RE    |
| Special Events and Amphitheaters     | SE    |
| Special Facilities & Beaches         | SF    |
| <br>                                 |       |
| Planning, Zoning & Building          |       |
| Administration & Fiscal              | PZ    |
| Planning                             | PP    |
| Zoning                               | ZO    |
| Building                             | PB    |
| Code Enforcement                     | PE    |
| <br>                                 |       |
| Public Affairs                       |       |
| Administration/DMAC/MPI              | PA    |
| Channel 20                           | CH    |
| Graphics                             | GR    |
| <br>                                 |       |
| Public Safety                        | PS    |
| 9-1-1 Program Services               | PS911 |
| Animal Care and Control              | AC    |
| Consumer Affairs                     | CA    |
| Emergency Management                 | EM    |
| Justice Services                     | JS    |
| Victim Services                      | VS    |
| <br>                                 |       |
| Purchasing                           | PR    |
| <br>                                 |       |
| Risk Management                      |       |
| Operations                           | RM-O  |
| Personnel                            | RM-P  |
| Finance                              | RM-F  |
| Logistics                            | RM-L  |
| Records                              | RM-R  |
| Miscellaneous                        | RM-M  |
| <br>                                 |       |
| Tourist Development Council          | TD    |
| <br>                                 |       |
| Youth Service                        | YS    |

Water Utilities  
Operations  
Personnel  
Finance and Budget  
Logistics  
Reports

WUD-O  
WUD-P  
WUD-F  
WUD-L  
WUD-R

Revised 06/2024

**Attachment C**

**TO:** ALL COUNTY PERSONNEL

**FROM:** VERDENIA C. BAKER  
COUNTY ADMINISTRATOR

**PREPARED BY:** DEPARTMENT/OFFICE (ACRONYM, IF APPLICABLE)

**SUBJECT:** TITLE OF PPM

**PPM #:** PPM NUMBER

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**ISSUE DATE**

This is the date the County Administrator signs

**EFFECTIVE DATE**

must be same date or after issue date

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**PURPOSE:**

Communicates why the PPM exists, begins with the word “To”.

**UPDATES:**

Establishes who is responsible for the PPM. This will generally be the department/office head most involved in implementing or enforcing the provisions of the PPM.

“Future updates to this PPM are the responsibility of the Director of .”

**AUTHORITY:**

Identifies source of policy or procedures established in the PPM. Examples of authority include the County Administrative Code; Board or County Administrator directives; specific requirements of law; appropriate, relevant reference documents such as industry specific regulation; and other references as appropriate. Authority shall be listed by order of precedence (i.e. federal, state, local). Reference to an authority should be as specific as possible. Each citation shall begin with a bullet point and end with “as may be amended”. Examples are provided below.

- United States Department of Labor, Occupational Safety and Health Administration (OSHA) regulations, as may be amended
- Florida Statutes, Chapters 119 and 257, as may be amended
- Palm Beach County Administrative Code, Sec. 405, as may be amended
- PPM# CW-O-001, as may be amended

## **SCOPE:**

(Optional, to differentiate from similar-appearing PPMs, to identify which department/office the PPM applies to).

## **DEFINITIONS:**

Used to explain specific terms in the PPM which may not be generally understood or which have a particular or narrow meaning. This section may be omitted if there are no words or terms used in the PPM which need to be defined. Terms shall be listed in alphabetical order, in bold typeface, without bullet or numbering style. Where the definitions section exceeds one page in length, the information must be placed as the first attachment of the PPM, with the following placeholder statement in the body of the PPM: “Refer to **Attachment A** for a listing of definitions related to this PPM.”

## **BACKGROUND:**

(Optional, to provide proper context for PPM).

## **POLICY:**

Establishes the desired action(s) or outcome(s) for the PPM.

## **RESPONSIBILITIES:**

(Optional, to provide overview of responsibilities dispersed throughout the PPM).

## **PROCEDURE:**

Details the steps or actions necessary to implement the Policy.

### **Additional information in reference to the structural format of the PPM:**

- All new and revised PPMs shall be prepared using the approved County standard word processing software in effect at the time of preparation.
- In order to maintain consistency of style and formatting, American Psychological Association (APA) rules shall apply (e.g. numbers expressed as numerals vs. text, bulleted lists, latin abbreviations, etc.).
- Ensure justified alignment, margins, indents, line and paragraph spacing is consistent throughout the PPM.
- Each page of the PPM shall be numbered in the lower right of each page as shown below. Any attachments, including forms to be completed, will indicate the PPM number in the lower right-hand corner of the attachment, followed by its letter designation and page number within

the total number of pages in the attachment (e.g. “CW-O-001/Attachment A - 1 of 3” would indicate the first of three pages of Attachment A for CW-O-001).

- The month and year that the attachment/form was created or revised must be shown in the lower left-hand corner of the first page of the attachment (e.g., “09/1995” would indicate September of 1995 as the date the attachment/form was created; and “Rev. 01/2009” would indicate the date the attachment/form was revised).
- Abbreviations and acronyms may be used where terms are used more than once and shall be defined when it first appears in the text (e.g. Board of County Commissioners (BCC)).
- Use of the term “should” will be replaced with “shall” when conveying necessity or requirement.
- If a hyperlink is embedded in a PPM and the web address is not written out, a brief description of where the document can be found shall be provided for the sake of printed PPM copies (e.g., “This [PPM](#) can be found on the County Intranet > Countywide PPMs”).

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**VERDENIA C. BAKER**  
**COUNTY ADMINISTRATOR**

**Supersession History:**

1. PPM # CW-O-001, effective (first date this PPM became effective: XX/XX/XXXX)
2. PPM # CW-O-001, effective (1<sup>st</sup> revision date: XX/XX/XXXX)
3. PPM # CW-O-001, effective (2<sup>nd</sup> revision date: XX/XX/XXXX)

**TO: ALL COUNTY PERSONNEL**  
**FROM: VERDENIA C. BAKER**  
**COUNTY ADMINISTRATOR**

**PREPARED BY:**

**SUBJECT:**

**PPM #:**

=====

**ISSUE DATE**

**EFFECTIVE DATE**

=====

**PURPOSE:**

To \_\_\_\_\_.

**UPDATES:**

Future updates to this PPM are the responsibility of the Director of \_\_\_\_\_.

**AUTHORITY:**

\_\_\_\_\_, as may be amended

**SCOPE:**

**DEFINITIONS:**

**BACKGROUND:**

**POLICY:**

**RESPONSIBILITIES:**

**PROCEDURE:**

\_\_\_\_\_  
**VERDENIA C. BAKER**  
**COUNTY ADMINISTRATOR**

**Supersession History**

1. PPM # CW-X-XXX, effective XX/XX/XXXX