



Policy Review **PLAYBOOK**

A guide for agency policy reviews to ensure alignment to Trump Administration priorities



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INTRODUCTION

BACKGROUND

Federal agencies and departments must update their policies to align with the priorities of the Trump-Vance Administration, ensuring consistency, compliance, and effective governance. As these priorities take shape, agencies must reassess existing policies to remove outdated provisions, revise language, and implement new directives that reflect the administration's vision.

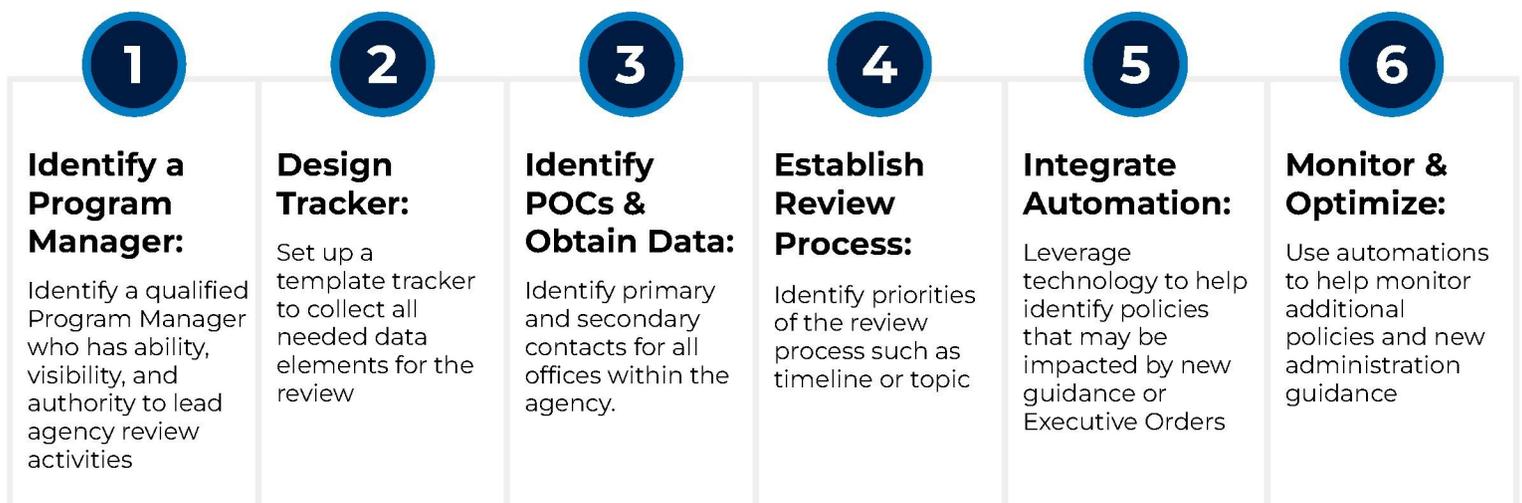
All agencies and departments should conduct comprehensive reviews of all internal and external policies and centrally track progress of this effort. Each agency should document progress in reviewing, revising and rescinding policy to support the vision of restoring efficiency and fiscal responsibility to the federal government

PURPOSE

The GSA Policy Review Playbook provides a framework for centralizing and streamlining the review of all internal and external policy and policy-adjacent documents (including rules, orders, directives, regulations, etc.) in a single repository. This process allows individual offices with subject matter expertise to provide recommendations and gives leadership the information needed for thoughtful decision-making when implementing policy revisions or cancellations. Benefits of implementing this framework include:

1. Awareness of all policy and policy-adjacent documents
2. Tracking and documentation of policies by office, recommended actions, and statuses
3. Dashboard of key metrics

POLICY REVIEW PROCESS



PLAY 1: IDENTIFY A POLICY REVIEW PROGRAM MANAGER

To ensure agency policies align with the priorities of the new administration, the agency should take a structured and strategic approach to coordinating policy review efforts. The volume of Executive Orders and other directives from the administration continues to grow, increasing the need for agencies to rapidly identify and update policies that cover a broad range of subject matter areas and organizations. To effectively manage this process, agencies should identify a highly qualified program manager with the expertise, authority, and visibility to lead policy reviews and ensure the agency remains aligned with the administration's objectives.

POLICY REVIEW PROGRAM MANAGER

- 1** Has the **program management expertise** to lead a complex agency-wide initiative
- 2** Leads **program governance** and oversight
- 3** **Understands** how EOs and other mandates apply to the broad program areas of the agency
- 4** Leads efforts to establish **policy review** processes
- 5** **Coordinates** with points of contact across all agency offices to implement the policy review process
- 6** **Assesses** the maturity of the review process, develops goals and an action plan, and obtains support to improve the program's maturity
- 7** **Measures and reports** on the progress of policy review activities

POLICY REVIEW TEAM

In addition to the Program Manager, agencies should identify alternate program managers to build a Policy Review Team. This team is responsible for assisting in the coordination of each part of the review process.

PLAY 2: DESIGN A POLICY REVIEW TRACKING SYSTEM & SUCCESS METRICS

To effectively establish a system for tracking the review of all of agency policy documents, it is essential to identify what data points must be tracked and what success looks like before beginning the data collection effort.

TRACKING SYSTEM	SUCCESS METRICS	
<p>Agencies should create a Policy Review Tracker using a collaborative technology, which allows for real time data updates, simultaneous editing and version control capabilities. These features enable the agency to standardize data fields, perform analysis and continuously collect new data inputs.</p>	<p>Count of Policies Reviewed to Date</p>	<p>Count of Policies Requiring No Action</p>
	<p>Total Policies Rescinded/Recalled or Revised</p> <ul style="list-style-type: none"> a. Total Rescinded/Recalled b. Total Revised 	<p>Total Word Count Rescinded/Recalled or Revised</p> <ul style="list-style-type: none"> a. Total Rescinded/Recalled b. Total Revised

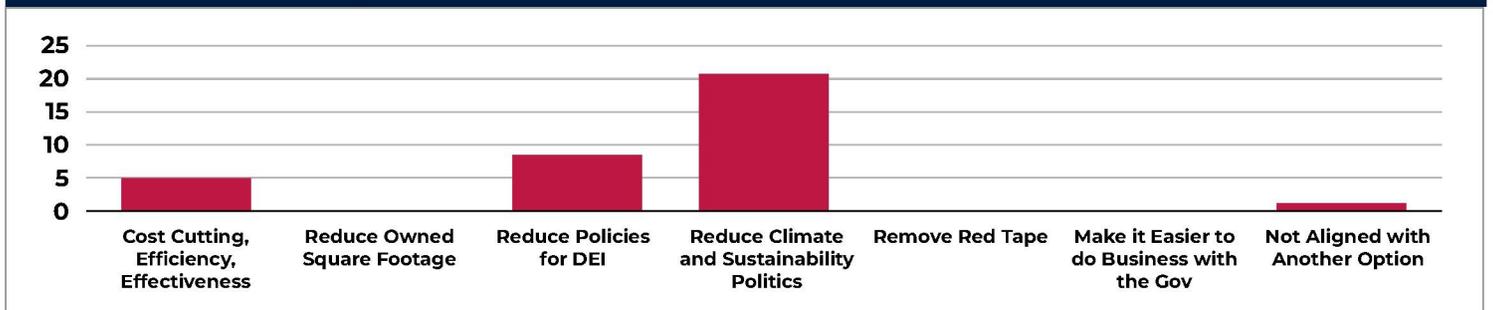
SAMPLE DASHBOARD

OVERVIEW

<p>Count of Policies Reviewed to Date</p> <p>1,323</p>	<p>Count of Policies Requiring No Action</p> <p>920</p>	<p>Total Policies Rescinded/Revised</p> <p>36</p>	<p>Total Word Count Rescinded/Revised</p> <p>100,286</p>
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POLICY BREAKDOWN		WORD COUNT BREAKDOWN	
Total Policies	36	Total Word Count	100,286
Count of Policies Rescinded/Recalled	27	Word Count Rescinded/Recalled	76,309
Count of Policies Revised	9	Word Count Revised	23,977

POLICIES RESCINDED/REVISED BY TOPIC



Topic	Count
Cost Cutting, Efficiency, Effectiveness	5
Reduce Owned Square Footage	0
Reduce Policies for DEI	8
Reduce Climate and Sustainability Politics	20
Remove Red Tape	0
Make it Easier to do Business with the Gov	0
Not Aligned with Another Option	1

To organize and track this information, the agency should create a dashboard with the identified success metrics. This dashboard should also organize the information by categories identified as key performance indicators (KPIs).

PLAY 3: IDENTIFY POINTS OF CONTACT (POCs) AND OBTAIN DATA

Agencies should identify key points of contact (POCs) within each organizational unit. Each organizational unit should identify one primary and one secondary POC. These POCs will receive direction from the Program Manager and coordinate within their respective units, ensuring streamlined communications and consistent messaging.

POC Table Example

Organizational Unit	Primary POC	Secondary POC
Organizational Unit #1		
Organizational Unit #2		
Organizational Unit #3		
Organizational Unit #4		

The Policy Review Program Manager should work directly with the POCs to ensure the organizational units populate all the data fields for each policy-related document in the tracker. The primary focus should be on “Quick Wins” and the secondary focus should be on Short-term, Mid-term and Long-term Actions. The Program Manager should monitor the tracker to ensure accurate and timely data input. POCs should be contacted by the Program Manager to supply missing data and adjudicate any input errors.

PLAY 4: ESTABLISH POLICY REVIEW PROCESSES

KEY REVIEW PROCESS PHASES

PHASE 1
Quick Wins

PHASE 2
Short & Mid-Term Actions

PHASE 3
Long-term Actions and Cultural Change

PHASE 1: QUICK WINS < 30 Days

The Policy Review Team should direct points of contact and subject matter experts to prioritize “quick win” documents — items that can be acted on right away — that support leadership key goals. The Program Manager and Policy Review Team can review the identified “quick wins” on a rolling basis and include them in recommended actions for the agency head.

QUICK WINS PROCESS



PHASE 2: SHORT- AND MID- TERM ACTIONS

While the Policy Review Team moves forward with the “quick win” items, program offices perform a deeper dive into the “short-term” and “mid-term” items — those that require 30 days to 6 month review periods — to determine how to address downstream implications.

PHASE 3: LONG-TERM ACTIONS AND CULTURAL CHANGE

The final phase focuses on actions that require more than six months to implement, for reasons such as interagency coordination, the rulemaking process, and Congressional approval.

Agencies should anticipate that at six months and beyond, the actions taken as part of the policy review process will begin to reflect new norms in agency culture. The Policy Review Team should continue with communication efforts of strategies, goals, and priorities of the agency leadership and the Administration.

PLAY 5: INTEGRATE AUTOMATION TO CLEAN DATA AND TRACK PROGRESS

A combination of rapid issuance of Executive Orders and volume of agency policy documents make manual policy reviews cumbersome and prone to error. Incorporating automation solutions improves the efficiency and reduces administrative burden in the policy review process.

POLICY REVIEW CHALLENGES



Not all documents are accessible to the Policy Review team. Many documents are linked in web pages that have been removed or are inaccessible due to permission settings or web pages that require passwords.



Current policy limits the use of Generative AI Tools for the analysis of non-public and Executive Branch proprietary information (e.g. Controlled Unclassified Information and pre-decisional information).



Documents can range from the simple to thousands of pages of regulations (e.g., the FAR).



File management system does not have the capability to search documents by category or topic.



The file management dataset is dynamic and constantly growing, with files being uploaded or edited on a daily basis.

AUTOMATION SOLUTIONS

SHORT TERM - Targeted Automations

1. Utilize an existing automation that identifies broken / inaccessible links within documents. The automation then emails the item owner, requesting they upload a pdf version of the identified file to the submission folder.
2. Provide a word count for each document.
3. Identify documents that contain key terms from prioritized EOs (e.g., [EO 14168](#) “Defending Women”).

LONG TERM - Leveraging AI Tools

1. Utilize AI services to review all new administration documents and categorize them based on the documents’ content and the administration’s priorities.
2. Include categories within the Google tracking sheet, allowing filtering and comparing EO categories to document categories and identifying matches and notifying the document owner.

PLAY 6: IMPLEMENT CONTINUOUS MONITORING AND OPTIMIZATION

To maintain an up-to-date policy landscape, tools and technology can be leveraged to automate the identification, tracking, and categorization of new policy documents and EOs as they are released. This will allow for continuous enhancement and optimization of the overall policy review process.

POLICY REVIEW AUTOMATION STRATEGIES



Automated Web Scraping & Data Feeds

Automated scripts or bots to scan relevant government websites, including the Federal Register and www.whitehouse.gov, for new EOs in real time.



AI-Powered Document Classification

Natural Language Processing (NLP) models to analyze the content of newly released EOs and policy documents, categorizing them based on relevance to GSA priorities and flagging items for review.



Automated Alerts & Notifications

A centralized tracking system integrated with email and collaboration tools (e.g., Google Sheets) to automatically notify the Policy Review Team and POCs when new policies or EOs are identified.



AI-Assisted Policy Impact Analysis and Recommendations

Trained AI models and managers to compare new EOs against existing policies, highlighting potential conflicts or necessary updates, streamlining the review process. Rank and prioritize actions for maximum benefit based on administration priorities.



Centralized Policy Dashboard

Upgraded real-time dashboard to improve transparency, enhance decision-making efficiency and visualize key metrics, trends, and pending actions related to new policy documents.



Data-Driven Adjustments

Metrics collected from the Policy Review Tracker will be analyzed to identify areas for process optimization, including streamlining approvals and reducing review cycle times.



Technology Enhancements

Further automation of data collection, analysis, and reporting will be explored to reduce manual workload and improve accuracy.



Lessons Learned Implementation

Insights gained from previous review cycles will inform updates to the review framework, improving efficiency and effectiveness over time.



Regular Training and Guidance

POCs and relevant personnel will receive periodic training on updates to the review process, ensuring consistency and compliance across all offices.

By institutionalizing these practices, agencies will ensure its policy-review efforts remain agile, data-driven, and aligned with the administration's strategic objectives.

APPENDIX: POLICY TRACKER TEMPLATE

The attached template can be utilized by agencies to use as a starting point for their policy review. The template features:

- Centralization of all agency policies and policy-adjacent artifacts (e.g., documents, memos, forms, trainings);
- Policy review status tracking by responsible offices;
- Classification of revisions by subject matter; and
- Point of contact directory

DATA FIELDS

Completed by office

1. Office (Drop Down)
2. Document #, if applicable with hyperlink (Free Text)
3. Document Title (Free Text)
4. Date Issued (Date Field)
5. Document Type (Drop Down):
 - a. Order/Directive
 - b. Memo
 - c. Guidance
 - d. Bulletin
 - e. Policy/Procedure/Technical Guide
 - f. Instructional Letter
 - g. Congressional Report
 - h. Acquisition Letter
 - i. Acquisition Alert
 - j. Class Deviation
 - k. Regulation
 - l. Delegation of Authority
 - m. Governing Authority
 - n. Operational Notice
 - o. Rule - Final
 - p. Rule - Not Final
 - q. GSAM
 - r. GSAR
 - s. Federal Notice
 - t. Website
 - u. BOT
 - v. Training Course
 - w. Other - identify in notes column
6. Originating Authority (e.g., EO, Guidance; Free Text)
7. Does the authority AUTHORIZE or MANDATE this activity (Drop Down):
 - a. Authorized
 - b. Mandated
 - c. N/A
8. Brief Description of Order, Rule, etc. (Free Text)
9. Recommended Action (Drop Down):
 - d. Revise
 - e. Recall
 - f. Rescind
 - g. No Action
 - h. Other
10. Timing for Recommended Action (Drop Down):
 - i. Quick Win: Action can be taken immediately
 - j. Short-Term: Action can be taken in 90 days
 - k. Mid-Term: Action can be taken in 6 months
 - l. Long-Term: Action will take more than 6 months
 - m. No action can be taken
 - n. Other - identify in notes column
 - o. Completed

POLICY TRACKER TEMPLATE

DATA FIELDS

Completed by office

Administrative Only Fields

11. Who has the authority to act on the recommendation? (Drop Down):
 - a. GSA
 - b. OMB
 - c. Another Agency (other than OMB)
 - d. Congress
 - e. Other
 12. Steps required to complete the recommended action (Free Text)
 13. Action Item Owner (Name of Individual)
 14. Post-Action Follow Up Activities (Free Text)
 15. Post-Action Follow Up Activities complete (Check box)
 16. Aligned with one of Administrator's Top KPIs (Drow Down):
 - f. Cost cutting/efficiency/effectiveness
 - g. Reduce owned square footage
 - h. Reduce policies for DEI
 - i. Reduce Climate and Sustainability Policies
 - j. Remove red tape
 - k. Make it easier to do business with the Government
 - l. Not aligned with another option
 17. Additional Notes (Free Text)
1. ID Number
 2. Status (Drop Down):
 - a. Added to pipeline
 - b. Added to memo
 - c. Memo issued by A-Suite
 - d. Action in progress
 - e. Complete
 - f. Closed (*Used for duplicate entries)
 - g. Revisit with office
 3. Topic
 4. Date Submitted to Exec Sec
 5. Exec Sec Control Number
 6. Date Action Completed (Confirmed by Office)
 7. Date Post-Action Follow Up Activities Completed
 8. Word Count



GSA POINTS OF CONTACT

We invite you to share your progress with us at:

policyreview@gsa.gov