

A Buyer's Guide

Choosing the Right Paperless Meeting Technology for Public Education Boards

Like any other public service-oriented committee, public education boards deal with far-reaching and major changes brought about by new demands. Changes in the education process and the need to be more responsive to teachers, students and administrators are just some of the pressing issues that board members need to be addressing. Time frames have been shortened, consistent communication of critical information is essential, and inefficiencies in the processes to support the board can no longer be tolerated.

Perhaps the most pivotal technology necessary to meet these challenges is the platform used for creating, modifying, storing, and sharing to the public the information used by public education boards. The days of relying on older, paper-based systems are over. Manual methods cannot meet the demand for timely additions and changes, they are unsecured and version management is impossible. Worse, communicating the outcome of a meeting can take days, as the competing versions of the documents must be reconciled. And for school boards using older, computer-based systems, many of those systems cannot meet the security, tracking and efficiency of today's best solutions. A modern governance solution is necessary. Not only does it provide better capabilities, but this new technology will reduce costs and help school boards, community college boards, and library boards save money.

To get these benefits, you need a system that works for all of the stakeholders. This includes administrators, support teams, board members and any public office holders who are involved. With tight budgets, administrative resources are limited and time is wasted reprinting meeting packets, constantly updating agendas and performing other repetitive manual tasks. Perhaps the most egregious

inefficiency is when meetings are derailed by out-of-date documents that don't contain the latest information, hindering the flow of accurate information to students, parents and citizens.

Identifying a new solution that drives efficiency and effectiveness is critical. This buyer's guide will help you identify best practices for selecting and purchasing a public education board solution, as well as features you should look for in a new digital system.



Best practices

for choosing and buying a modern governance solution for public education boards

Choosing a modern digital solution to support school board activities starts with a buying process designed to deliver optimal results. When the buying process is flawed, the chances of a successful outcome are greatly reduced.

The first step in constructing a valid buying process is to ensure that all stakeholders who will use the solution are part of the buying committee. Too often, only the school committee or the top administrators are involved in the decision. As a result, the needs of the administrative staff and other support teams are ignored. And if the solution doesn't work for them,

the benefits will be few. It is important to remember that the starting point for quality school board documents is the administrative staff. If their needs aren't met, the output will be of lower value to the board and others.

The second key element of the buying process is to ensure that it evaluates how you will migrate from your current process to a modern governance platform. Losing the ability to utilize older meeting documents and backup information is not acceptable. You must also consider how training will be provided as part of the migration process.



Critical Capabilities and Functionality

for Best-in-Class Paperless Meeting Management Solutions

This section of the buying guide will detail the key features and capabilities that your public education organization should demand in a modern governance solution.

It is important to ensure that these features are currently available, and not part of a “future product road map” with only a promise of implementation.

1 Securely tracking and managing documents

Privacy and data protection statutes are becoming more stringent as constituents demand better protection for personal data. Meeting notes and supporting documents often contain sensitive information as well. As a result, security is now critical. Systems that rely on paper-based documents nearly always fail basic tests, such as information control and document tracking. This is also true for unprotected electronic documents, such as PDFs that lack security. Making matters worse, cyber threats regularly target and utilize PDFs for broader attacks. The new system should have a self-contained secure document capability to protect any information provided to board members as necessary and should help them prevent an information breach.

2 Compliance with your local disabilities act

One of the most overlooked aspects of disabilities legislation compliance is ensuring that taxpayers and constituents with disabilities can review or use the information that is published by public education organizations. This may include closed-captioning for videos and text-to-speech software for documents. This element is vital to ensuring that all community members are able to participate in the civic process.

3 Strong search functionality

Everyone loves Google, and search has become a huge timesaver. That means your new system for managing board meeting information must have strong search capability, but with additional features that are specific to supporting the board. In this context, search means more than just finding a piece of information. Search functionality must be able to tie that information back to a specific meeting or document so that it is always in context. The search function should also simplify finding other related or backup material that is appropriate to that search. Further, accurate and effective search may also impact your compliance standing because the inability to find information or its context may create a problem.

4 Ability to import existing documents

Incorporating the past and current agenda packets materials, supporting documents and any other information into the new system is a must-have. This is non-negotiable. The vendor should have a demonstrable and documented process for how this occurs; it cannot be left to chance. Additionally, reference customers should be queried about how this process occurred, and if it was completed in a satisfactory manner.

5 Direct cost reduction

A new solution should also help on the budget side. Too often, the work of board administrators and superintendents to support board operations is an area of high cost/low efficiency. The manual process of preparing documents and updating them may require a larger support team than an efficient computer-based system. Frequent changes to the packet end up requiring increasing amounts of support time. Another area of cost is printing and reprinting documents when paper-based systems are used. An effective archive and tracking system will also reduce costs by cutting the time needed to manage and find information.

6 Enhance flexibility

One truism about public education board meetings is that the closer it gets to the meeting date, the more board members request changes to the meeting documents. Unfortunately, many systems cannot handle last-minute or frequent changes. An ideal solution would support changes and modifications better by simplifying the process and allowing changes closer to the meeting. Nearly every system that relies on paper-based output will fail this test.

7 Reduce inaccuracies

Inaccurate or inconsistent documents will cause major problems for board members. The system must ensure that everyone has the same version of the document and that older versions are automatically replaced. Beyond that, it is essential that the system can accurately deliver changes/edits/updates to the administrators and support staff in a usable and trackable format. Handwritten annotation to documents is fraught with problems.

What to Look for in a Vendor/Partner

When choosing a new paperless meeting management system, much of the focus tends to be on the product. However, it is just as important to make sure that the vendor you choose commits to offering the services and capabilities around the product that optimize the ownership experience for your public education organization. Providing a top-notch solution requires that vendors provide the following:



Best-in-class user training

Perhaps the single most important vendor service is to train your administrators, superintendents, support staff and board members on how to use the new system. Without effective training, the solution may make things worse. Many vendors offer online training, which is often not enough for all users to get up to speed smoothly and quickly. An ideal technology partner will provide flexibility and efficiency in onboarding, giving users the option to utilize self-directed learning resources, videos and remote instructor-led group training, remote individual coaching, on-site instructor-led training, or a combination of training options that fits best. A flexible training structure like this ensures that all questions are answered and that the training was effective for all users.



Documented and effective migration services

A good solution doesn't leave the public education organization with two different environments, one prior to installation and one after. The ability to work across all documents, and to use them regardless of when they were created, is critical. Without information migration services, the new system will only cause frustration and inefficiency whenever older information is required, and that will happen regularly.



Strong security solutions

Any vendor being considered must have a complete and effective set of security capabilities in the product and commit to enhancing those capabilities as necessary. Further, security should be a key driver in the product design, not an afterthought or implemented selectively. Any system that continues to rely on paper to deliver board meeting documents is fundamentally insecure because paper documents have no controls.



Outstanding customer support

Support quality is likely to determine the quality of your ownership experience. Great support means a few things: people who answer the phone quickly, agents who speak your language well, support representatives who have strong product skills and experts who are available quickly. One of the best ways to gauge the quality of support is to ask existing customers if they are pleased with the support they receive.



Focus on this specific solution

Some vendors may have very broad product lines or lots of different solutions for public education organizations. That is fine, but it is critical that they also have the necessary focus on agenda packets document management, streamlining the meeting process and improving governance. It is also vital that the vendor of your choosing demonstrates a commitment to and investment in supporting the work of public education boards. Vendors that focus on these aspects will bring new features to market faster and have deeper expertise that you can rely on.

Key Takeaways

This buyer's guide will help you make the best decision for improving the process of agenda and meeting management, accessibility, increasing transparency and boosting community engagement for public education boards.

Many existing solutions increase costs with inefficient processes for creating and managing key documents, and they may also lack the security necessary in light of advances and changes in cyber threats. It is also important to improve the processes that support the public education board to make it easier to add to and change documents – providing the ability to make changes closer to the meeting date. Many legacy systems just don't measure up.

Updating your document management platform from a less-than-optimal legacy product to one that will meet current and future needs is not complex. To be successful, though, you need a strong plan for selecting the best solution.



Community by Diligent

Powering modern governance for public education

Community by Diligent enables public education leaders and administrators to achieve excellence in modern governance. It supports responsiveness to their constituencies through an integrated set of technologies, insights, and processes that leverage Diligent's deep experience in offering digital governance solutions to public and private organizations of all sizes. Diligent has joined forces with BoardDocs to build the next generation paperless meeting management software designed exclusively to meet the needs of public education organizations.

Built with a mobile-first approach, Community by Diligent equips public education administrators and board members with a powerful technology solution that facilitates accessibility and transparency in an ever-growing digital environment.



To learn more about Community, contact us today:

Call: 800-407-0141 • Email: Community@diligent.com • Visit: www.diligent.com/community

"Diligent" is a trademark of Diligent Corporation, registered in the US Patent and Trademark Office. All rights reserved. © 2019 Diligent Corporation.