

# Top Tips When Considering Agenda Automation

## *Helpful hints on avoiding the costly pitfalls of automating your agenda process*

In recent years, the evolution of technology has been a boon for government organizations to transition from a paper-based, manual process of agenda management to more streamlined, interactive, online agenda automation systems.

It's easy to see why many city and county governments are looking into such investments given the huge savings in time, effort, and money agenda automation tools provide. However, time has shown there are some common and expensive pitfalls that if not avoided, could lead to a failed agenda automation initiative.

Many county and city governments have invested hundreds of thousands of dollars on home grown solutions or 3<sup>rd</sup> party applications. With these kinds of dollars at stake, making a mistake could be very costly. Regardless of whether you want to design your own system or are looking to an outside vendor, this article will help you to avoid the most common of these pitfalls.

If you are considering automating your agenda or the entire legislative process in your organization, there are several points to ponder. First of all, what is it you want to accomplish? For smaller cities, merely utilizing an online application to speed up the agenda creation process is sufficient. This is usually referred to as "agenda automation" and it typically doesn't address meeting Minutes or other important aspects of the legislative process. Other cities will need to examine the entire legislative process and identify where efficiencies can be achieved by automating various aspects of the process. Solutions that address the entire process are typically referred to as "legislative management" tools and include things like agenda automation, Minutes creation tools, web publishing tools, and advanced search engines. Some even include optional streaming video.

As you conduct this research, one of the first pitfalls to keep in mind is that merely automating a current process only shortens the time needed to get the same result. For some, arriving to the same result more rapidly is just what they need. Others, however, desire to use technology to take their legislative process to a new level and accomplish goals that were previously impossible to achieve. The good news is that some legislative management tools allow

cities and counties to implement their best practices across the entire legislative process. This way, you're not just getting the same old results faster; you are getting better results more rapidly.

Legislative management solutions have an impressive track record. A number of cities and counties save considerable time and money with legislative management solutions. For example, a medium-sized city in northern California routinely saves between 28-30 man-hours per week. But time savings is frequently not enough to justify the cost of these programs. Tangible dollar savings are required. A county in central Florida saves over \$60,000 annually by eliminating courier costs and a city in southern California saves over \$100,000 every year on paper costs. Some of the less tangible aspects of these types of solutions include never again misplacing a document; shifting the burden of finding documents to the requestor by providing a convenient online search tool; and finding both new and very old documents in seconds rather than days.

Here is a checklist of the top items every clerk needs to know when considering an automated legislation management system:

**Adaptation and Adoption:**

One of the first and least obvious of the costly pitfalls to avoid is to assume that you should settle for the limitations of software. The clerk is ultimately responsible for the form and the accuracy of the agenda and the Minutes. Local regulations outline the format that the agenda, Minutes, and summaries must take. By compromising on this issue with the justification the format the software provided was "close enough", many clerks have found themselves spending hours manually changing formats to meet local requirements. So much for the hoped for time savings. These clerks typically were out looking for another solution within a year or so – thus wasting the money and time invested in the first attempt. The latest generation of both agenda automation and legislative management technology eliminates this problem and allows the software to be configured to adapt to how the clerk needs it to be.

The better solutions allow you to rollup your agenda packet, Minutes, and summaries with a single mouse click! Related to proper configuration is the issue of ease of use. User buy-in is critical to the success of any technology initiative. It has to be user-friendly – if it's not, no

one will be willing to adopt the software and thus, you will never realize promised savings. This is particularly important when multiple parties are involved such as board or council members who don't have time to read through an inch-thick user's manual. Once you have found a solution that is fully configurable and easy to use, "internal champions" from each department can further promote user adoption. These people need not be department heads, but should to be chosen with the blessing of the department head. Those champions need to be fully trained on what the tool can do and how to use it. With this information, internal champions can help the cause.

### **Implementation processes:**

This is often one of the most overlooked points and yet, it can be the primary pitfall that destroys your IT initiative. When considering adopting new technology, software actually represents a very small, yet important, component. Implementing a new system can be a risky proposition; users may not adopt the new system; the system may be configured incorrectly, and the system may not work as promised. Having a well thought-out implementation process can effectively reduce the risk of a new system implementation. As such, your implementation plan should include the following major elements:

- A customized training program that includes hands-on training for system administrators and end-users. Train-the-trainer methods have also proven effective to ensuring a successful implementation.
- The identification of department champions – as mentioned earlier, this will help you build user buy-in at the departmental level across the entire organization
- Milestones – this will allow you to see if your project is on track or going sideways with enough time to make necessary adjustments.
- Timeline or schedules – each milestone and major objective should have a due date. This will let you know if you are starting to fall behind.
- Rollout phases – most successful initiatives are not rolled out all at one time. Rather, a key department or group of people is selected for "phase 1" and as the success of phase 1 grows, other people or departments are added.

- Written project plan – your IT department or vendor should create this document for you, and it should contain all of the above elements.

### **Approval Process:**

Another pitfall is to assume that all approval automation processes are created equal. Some agenda automation solutions tend to offer a single approval process with limitations to the number of people and the routing of the agenda item. More advanced legislative management solutions tend to offer more flexibility in structuring the online approval process. For example, cities can have several completely separate approval processes to have items included in the agenda. In cases like this, the system should be able know when to use each of the different processes. Furthermore, the system you are considering needs to mirror your existing agenda item approval process. Each city and county has a different process. Each department can have its own formal bureaucratic process, coupled with its own workflow for agenda item approvals. Sometimes, obtaining approvals can be simple and linear; other times it can be a multi-layered logistical nightmare. You will want to examine if your approval process will change with the addition of new staff, population growth or the election of a new official. If so, you need an approval system than can grow along with you.

### **Full Text Search:**

The ability to search through documents such as agendas, agenda supporting materials, meeting Minutes, summaries, and even video recordings is not a “nice to have” - it’s a downright necessity. The pitfall is being shortsighted on how you want to lookup your agenda-related documents. Many assume that conducting a full text search on the agenda only or on the meeting Minutes only, is sufficient. Many clerks very much need the ability to also perform full text searches on supporting materials. Be careful when selecting your legislative management solution because very few have this feature. When clerks are asked to produce documents, Pennsylvania (and many other states) prescribe specified amounts of time to deliver the documents, known as the Right-to-Know Law. When considering automating your legislative management process, you need to consider which document types you will need to search in response to requests from the mayor, council, board, or other

constituents. Who wants to spend hours digging through boxes for that one document you've been tasked to find? With an automated system, people are able to look it up for themselves on the Internet – or through a secure Web connection for internal access.

**Automated Minutes Creation:**

Another common pitfall is to forget to address the automation of meeting Minutes when looking at agenda automation. Did you know Minutes creation can be automated? You don't necessarily have to start with a blank piece of paper; the agenda outline with bulleted items can be automatically imported into a Minutes template. Many cities and counties have a person whose sole job is dedicated to taking Minutes. They shouldn't have to spend several days working on it – it can be 90 percent finished by the end of the meeting. Many cities and counties are forced to go back to the drawing board and examine how to incorporate a Minutes creation tool into their existing application. This can be costly and a hassle. It is better and more cost effective to look at automating both the agenda creation process as well as the Minutes creation process at the same time.

**Optimize the Enterprise:**

To avoid this pitfall, you must take into consideration that a new legislative management tool will have an impact on the entire organization, not just the clerks' office. Do your department heads and others across the organization submit items for the agenda? If so, you need to consider what role they play in the creation of the agendas. For instance, who receives the agenda packets? Should they have full or limited access to the entire packet including the Minutes, agenda, supporting material? The answer to these questions will influence the impact of your legislative management tool. By neglecting to take these considerations into account, some clerks have found their new tool to be only partially effective in reducing workloads, stress, effort, etc.

**Flexibility is Key:**

What do you do with the electronic agenda packet once it's created? It may not be enough to simply e-mail it to the constituencies who need it. There are still those who want to have the agenda in a tangible, paper-based format. For those who do not want to use a computer

during the meetings, the latest generation of technology offers a “single-click” printing option that will print the entire agenda and all of its supporting materials in the proper order at one time. This is important for those Council or Board members who would rather have a stack of paper in front of them instead of a computer screen. You’ll also want to have the option to deliver the agenda and supporting material in a variety of electronic formats such as on a CD, through email, etc. Another important point to bring up here is the number of meeting types required. Many applications only allow for a limited number of meeting types or charge extra when more meeting types are needed. Better solutions should give you unlimited meeting types.

**Output:**

What does your city need once the meeting is done? Is it the agenda? Meeting Minutes? Supporting material? Meeting summaries? You need a way to quickly and easily publish and archive all those items in the proper format as needed. Some organizations prefer just agendas and Minutes to be published for public consumption. Others want summaries instead. A common pitfall is to assume that all output is the same or worse, to not fully consider what is really desired in terms of output. What format do you need your Minutes to take? What format should be used for your agendas? Does each agenda item need a unique number that stays with the agenda item even if it is moved to another meeting? Better solutions allow you to fully customize the look of your documentation as well as provide unique tracking numbers.

**Integration:**

Many organizations already have a document management system. If you are adding an agenda solution to your document management system, you can avoid a lot of time-consuming headaches by integrating the new agenda or legislative tool with your document tool. This would allow for documents scanned into your document management system to be seamlessly pulled into your legislative solution. The pitfall is to assume that all legislative management solutions can be integrated in this manner – most of them can’t.

**Streaming Video:**

Thanks to the Internet, the public and other constituents now expect to have access to public information from their personal computer. What's more, people are coming to expect video from the government. Many cities across the country are making their legislative process more transparent by posting board and council meetings online coupled with the agendas and supporting documentation. Streaming video and archiving video of the meetings also has the benefit of supporting and validating the clerk's Minutes making. If a section of Minutes is ever challenged, the clerk can open the actual video of the meeting in question in just a few clicks. Another thing to consider is that streaming video captures the entire meeting, and some agencies have ruled that the advent of streaming video has even eliminated the need to take verbatim Minutes.

**Size does matter:**

A tool designed for large counties is probably not the best solution for a small township of 10,000 people. Recent technology has made the use of an application service provider (ASP) with legislative management solutions possible. This eliminates the need for small towns to purchase the databases and server hardware that typically is needed for either agenda automation or legislative management technology. Plus it eliminates the need for an IT professional to service that hardware. This new option opens the doors for small townships to have many of the same benefits realized by larger counties at a fraction of the cost.

By following these tips on what to look for automating the agenda and legislative management process, we hope you that find what you need to reduce the risk involved in automating the legislative process, save tax dollars, increase efficiencies, and reduce stress, which will make everyone breathe a little easier.

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