



iCompass

BUYER'S GUIDE

Optimizing Agenda and Records Management for Local Governments

The Importance of Local Government Records & Why Current Solutions Fall Short

For many cities and towns, the staff who support local governments are the ones who do the real work of running a municipality. They are now making a concerted effort to better engage citizens and to streamline municipal operations. The ability of council to operate effectively and to make decisions will be central to improving service levels.

For council to operate effectively, they must have all necessary past and present documents. Providing these files is a team effort involving clerks, town employees and agenda packets members. The paper or computerized system used to prepare this information will determine how useful the information is. Too often, many of the existing systems for managing meeting-related documents only truly serve the council members and are hard for clerks and other municipal employees to use. These systems lack the key features necessary, making the process difficult, inefficient and frustrating for the clerks and support teams.

A key reason many existing systems focus on the council members and chairpersons is that those people often drive the buying process and only understand their own needs. Making matters worse, many of the council members and chairs don't really know the document creation and management process that the staff uses, so they don't choose the right solution.

Determining the Right Buying Process for a Better Agenda and Records Management Solution

Municipalities find that legacy system to support the operating council lack critical features, or that they make daily tasks redundant and inefficient. For this reason, many are looking to migrate to a better solution. Nearly every municipality is involved in one of two upgrade scenarios:

- Moving from a paper-based system
- Upgrading the current computer-based system

This section of the buyer's guide will focus on how to develop a buying process that is most appropriate for each type of migration.

However, to start, this guide will focus on the aspects of the buying process that are common for both.

The elements of the buying process that are common for both paper and computer-based system upgrades include the following:

- Ensure that all the necessary parties participate in the process
- Understand the compliance and legal issues that can impact council member communications
- Identify and detail key tasks the software must support: premeeting, during the meeting and post-meeting





Buying process elements for upgrades from paper-based systems

When a municipality still uses paper-based systems to support council, and this is quite common, the buying process must focus heavily on how the migration from the existing paper documents to a computer-based system will occur. The buying process must put substantial scrutiny on this point, as “starting fresh” and ignoring past documents won’t work. Sifting through old paper documents to find information from past meetings or deliberations is not acceptable.

Another important part of the buying process is evaluating the vendor’s commitment to providing a full solution that supports council activities. In some cases, the meeting management solution is limited and is a small piece of a much larger solution for other aspects of municipal operations. As a result, the solution may lack functionality and have limitations that won’t become apparent until too late.

Replacing a current computerized system

When a municipality wants to replace an older or less-functional digital system, a few specific issues must be considered. The initial question that should be part of the buying process is why an incumbent vendor needs to be replaced. Many municipalities are finding that incumbent vendors are falling short on key capabilities. They are not able to provide a simple and efficient solution for clerks, to meet compliance demands, to provide sufficient training and support, or to ensure security.

The buying process should also include a full understanding of how each specific vendor supports the migration to the new system. Trying to do a migration “over the phone” is problematic; it can be extremely frustrating for staff, and problems can be difficult to solve. Getting the benefits of the new system requires successful migration.

The buying process must also scrutinize the security and compliance claims of a potential vendor. These two issues are becoming thornier, and with recent changes, a strong vendor will be on top of the latest requirements. It is worth asking reference customers about this issue and about their experiences on that subject.

Critical Capabilities and Functionality for Best-in-Class Agenda and Records Management Solutions

This section of the buying guide will detail the key features and capabilities that your municipality should demand in a new 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 council 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 municipalities. This may include closed-captioning for videos and text-to-speech software for documents. It may seem like a minor point, but as you move forward, deploying a solution that is compliant will eliminate many future headaches.
- 3. Strong search functionality** – Everyone loves Google, and search has become a huge timesaver. That means your new system for managing council meeting information must have strong search capability, but with additional features that are specific to supporting municipal council. 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. Further, 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 clerks and town employees to support council 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 municipal council meetings is that the closer it gets to the meeting date, the more council 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 council 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 clerks 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 meeting and records 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 the municipality. 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 clerks, municipal employees, support staff and council members on how to use the new system. Without effective training, the solution may make things worse. While many vendors espouse the benefits of online training, it is far preferable to have one-on-one training with vendor staff. This ensures that all questions are answered and that the training was effective. Also, training should not require additional fees or costs.
- **Documented and effective migration services** – A good solution doesn't leave the municipality 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 council 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 reps 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 municipalities. That is fine, but it is critical that they also have the necessary focus on agenda packets document management. Vendors that focus on this problem will bring new features to market faster and have deeper expertise that you can rely on.

Key Takeaways

This buyer's guide provides a complete perspective for identifying the optimal solution for updating your current process to deliver council documents and information. The twin demands of councils having to do more and the increasing security/governance requirements being placed on the agenda packets are rendering many existing solutions incomplete and ineffective. Many municipalities are finding that, in order to meet the general goal of better serving their constituents, they need tools that enable municipal council to operate more effectively.

Changing to a document management platform that will meet current and future needs is not a complex process, but it's one that requires a strong understanding of the key features required in a best-in-class solution and the services that the vendor of that solution must provide. Both aspects are equally important. When either the product or the vendor-delivered services are lacking, the result may well result in more problems and continued frustration for everyone involved.

"I recreated the City Council meeting from last night and iCompass compiled the packet in less than 2 minutes! It took me over 3 hours to compile that same packet in our current system."

— **Stephen E. Powell, MMC**
City Clerk at the City of Shawnee, Kansas

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Questions?

Ask about our products, implementation or anything else.

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