CIVICCLERK® EBOOK

Municipal Clerk Best Practices

for Transitioning to a New Agenda and
Meeting Management Software
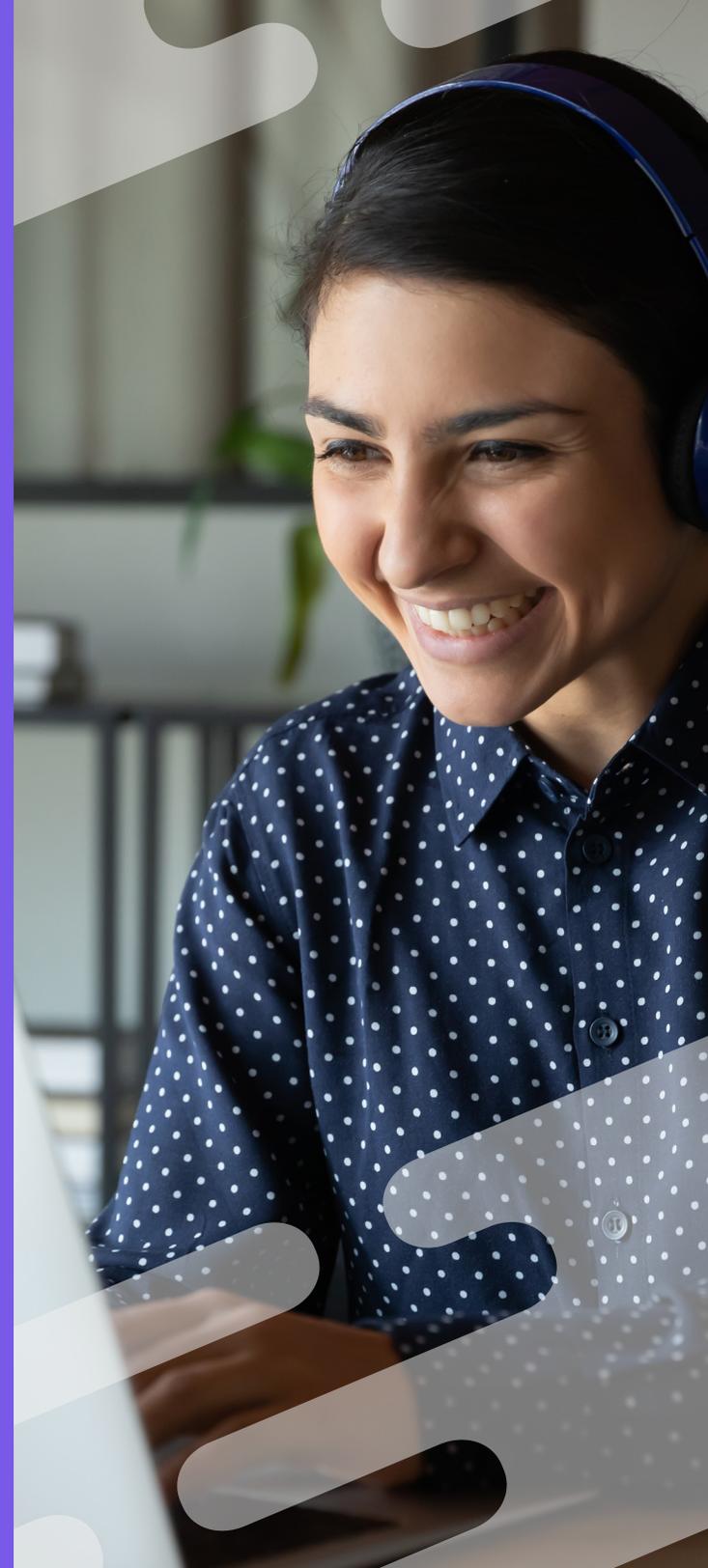
People don't always like change.

It's a fact of life. Even when we know change is needed—a bigger house, a new job, a more reliable car—many of us feel a deep-rooted desire for consistency and to avoid the difficulties that often come with a new routine, tool, or system. This reality is as real in our day-to-day business operations as it is in life—especially when it comes to a software transition, a phrase that often elicits groans and clicks on the kick-off meeting declined button.

Even for those who don't like change, there's good news. When it comes to the agenda and meeting management software you rely on today to create and distribute agendas, meeting minutes, and manage documents and video files, you don't have to be so afraid of the transition that you continue to use software that is no longer meeting the needs of

your local government. Our experts in municipal meeting management have weighed in on the best practices for planning and executing a transition to a new agenda and meeting management software so you can lead an efficient, outcomes-driven implementation.

PART 1

The Benefits of Transitioning to a Modern Agenda and Meeting Management Solution

If you've been hesitant to consider automating parts of your document management system or switching to a more modern system that better meets your needs, understand that by taking the time to implement the right solution, you'll save yourself hours of time managing files every day—without ever losing your status as your community's document resource master.

Here are seven ways that a new agenda and meeting management software solution will put time back in your workday. Let's begin.

1 No More Searching File Cabinets.

It's estimated that employees spend 20 percent of their time searching for documents, in part because three percent of an organization's records are misfiled. With agenda and meeting management software, any file you need is only a few clicks or a simple search away.

2 No More Standing at the Copy Machine.

How much time do you spend standing at the copy machine before every board or staff meeting? With agenda and meeting management software that allows you to route files electronically, you'll save hours every week, and can avoid the stress and mess that comes with being the staff member who needs to replace the printer ink.

3 Allow Citizens to Self-Service Their Public Records Requests.

A significant portion of your time every week is likely spent accepting and responding to requests from citizens for public records. By implementing a software solution that allows citizens to search for and obtain electronic copies of files, reports, agendas, minutes, and other municipal documents quickly, you'll receive fewer phone calls every week, and you'll have happier citizens. Everyone wins.

4 ## Access to Any File. Anywhere. Any Time.

Public sector operations rely on mobile access to content. Transitioning to a mobile-optimized agenda and meeting management software solution can provide such time-saving convenience.

5 ## Automate Agenda Creation Follow-Ups.

A software solution that allows you to automate requests for agenda items and necessary follow-ups ensures you still get the information you need, without time spent conducting manual follow-ups.

6 ## Ensured Compliance.

Every one of your citizens deserves equitable access to documents, records, and local information, including the one in four citizens living with a disability. Choose an agenda and meeting management solution provider that shares your commitment to digital accessibility, and that provides convenient functionality to post and share agendas and minutes in consumable formats easily.

7 ## More Efficient Task Management Leads to More Strategic Bandwidth.

The role of the municipal clerk is changing in tandem with the digital transformation of local government. Today's clerks need to find efficient systems to manage daily tasks so they can take on more strategic initiatives. Agenda management software can help.

PART 2

Finding the Right Time for a Change

For municipalities that are already budget-and resource-strapped, it may never feel like you have the time and resources to commit to a software transition, but wasting time following outdated, time-consuming workflows won't help you to meet your citizen engagement goals or move your community forward either. If you choose not to proactively make a change to your agenda and meeting management system, you could be forced to make a change later when:

+ Elected officials or your administration mandate it	**+** Existing board members and key staff retire
+ Citizens demand	**+** State legislators mandate new digital requirements

Under the pressure of such expectations, processes can become rushed, timelines condensed, and you may not feel you've given the software selection and implementation process the time and attention it deserves.

Instead, proactively choose to initiate a system enhancement, and you will benefit from:

• Streamlined processes through software automation features

• More time to focus on strategic initiatives

• Increased accountability among board members due to enhanced team collaboration and visibility

• Embracing your evolving strategically-focused role within your administration

• More significant cost-savings compared to overpriced and outdated systems or paper-based workflows

• More time put back in every workday

PART 3

Preparing for Change by Evaluating Your Current Workflows

Whether your current agenda and meeting management workflows are manual or reliant on an existing software solution, before you choose a new software system, take the time to evaluate your current workflows for building and distributing agendas and meeting minutes from start to finish. Ask yourself the following questions:

> **+**   Where is the most significant loss of time in preparing agendas?
> What workflows could we streamline or automate?

> **+**   Why is this our process?

Note: If your answer is: That's just the way we've always done it, consider if a new workflow could save you time or improve efficiency and transparency. We have found that 99.9 percent of the time, the answer is yes.

Include other key document contributors into your process analysis.

Gather them together and ask the following questions:

Why are we following our current operations? • Are there legal reasons? • Are our processes set by ordinance or other internal requirements?	Do our current workflows enable connectedness with our citizens? • Do they enable transparency? • Do they enable internal collaboration?
Who created our processes?	How long does it currently take to build an agenda, route it for review, and publish it along with all associated documentation?
Are the right people involved and performing duties appropriate to their roles?	Are there redundancies or opportunities to streamline our current processes?
Do our processes align with our administration's current strategic goals or plans?	What are our pain points (consider this your software feature and functionality wish list)?

PART 4

Laying the Groundwork for Transition

Once you have a thorough understanding of your current processes, strive to understand your goals and requirements for your software transition.

> ➕   Define what is driving the change (The WHY)

> ➕   List the key benefits you are seeking (The WHAT)
> - Tie these to tasks, jobs, and potential for time saved
> - Tailor the benefits to your user groups (e.g., board members, citizens, council members)

> ➕   Research software solution options (The HOW)
> - Talk to fellow municipal clerks who made similair software transitions and visit them on-site to view their software and experience their workflows

Note: Consult with experts who have helped other cities and counties transform their processes and ask for advice based on your community, size, and needs.
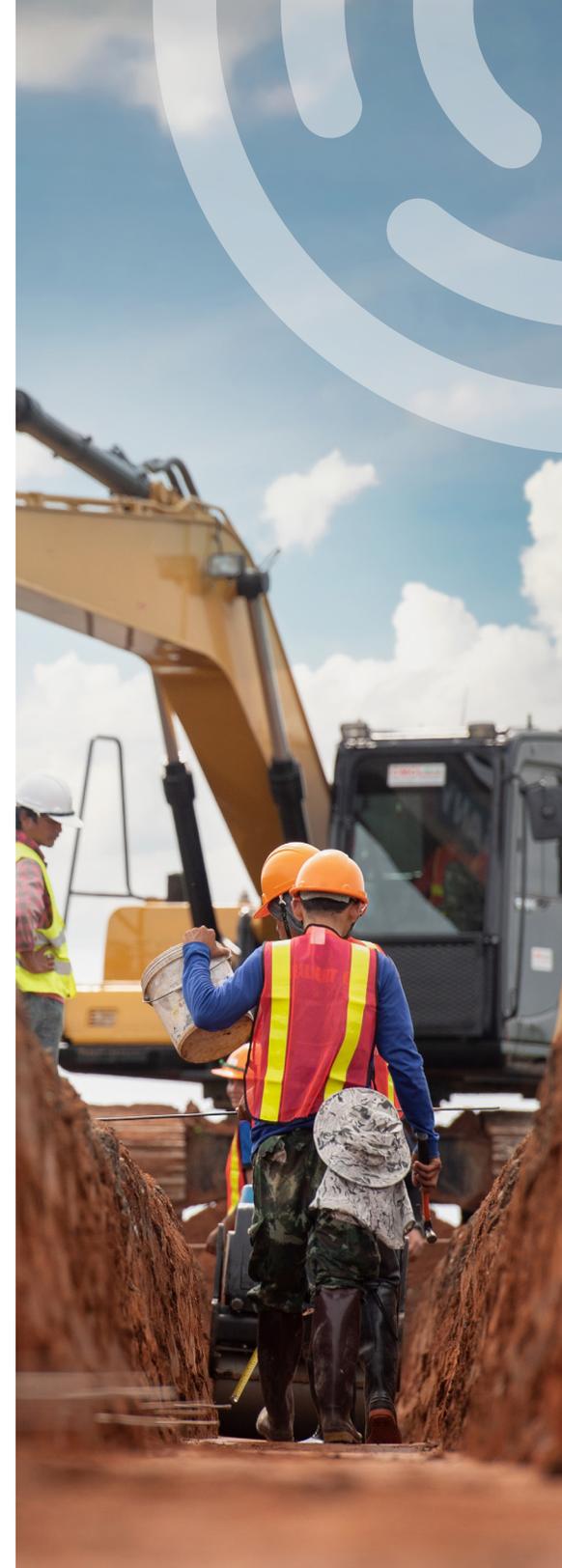
PART 5

Communication **Best Practices**

No software transition, especially one of magnitude, can be completed in a vacuum. You will need the support and collaboration of vital members of your administration, which means communicating openly, fostering two-way dialogue, and listening and being receptive to feedback. Throughout the software transition process, follow these communication best practices:

LISTEN

- Gain input from those doing the manual work today
- Establish a procedure for capturing feedback and suggestions throughout the transition

COMMUNICATE

- Why the process is changing and what benefits you are seeking
- How the process is changing-being clear about what will and will not change
- Stress the importance of setting aside time for training and practice
- Acknowledge that there may be an increased workload during the transition
- Schedule touchpoints throughout the process and communicate any roadblocks to success for full transparency
- Never be afraid of overcommunicating

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PART 6

Managing Resistance

Before changing agenda and meeting management systems know that your role in the process must be more than that of implementation team leader. It must be that of change management agent, someone who assuages team members' fears over change and how the new system will modify their day-to-day routine. By remaining positive and communicating with your board members every step of the way, and choosing the right system for your administration, you take the steps needed to mitigate discomfort and resistance.

Whether you are following a manual agenda and meeting minute creation and distribution process, or you are using an existing software system, you can expect to hear the following concerns from board members and staff members:

+ I'm comfortable with the way we do things today. I know where everything is, and I'm used to the current process.

+ I like having a paper copy of agendas and minutes.

+ The last time we transitioned software, it was a nightmare. Why should we go through that again now?

+ Will we lose irreplaceable files in the transition?

+ Now is not the best time for a transition.
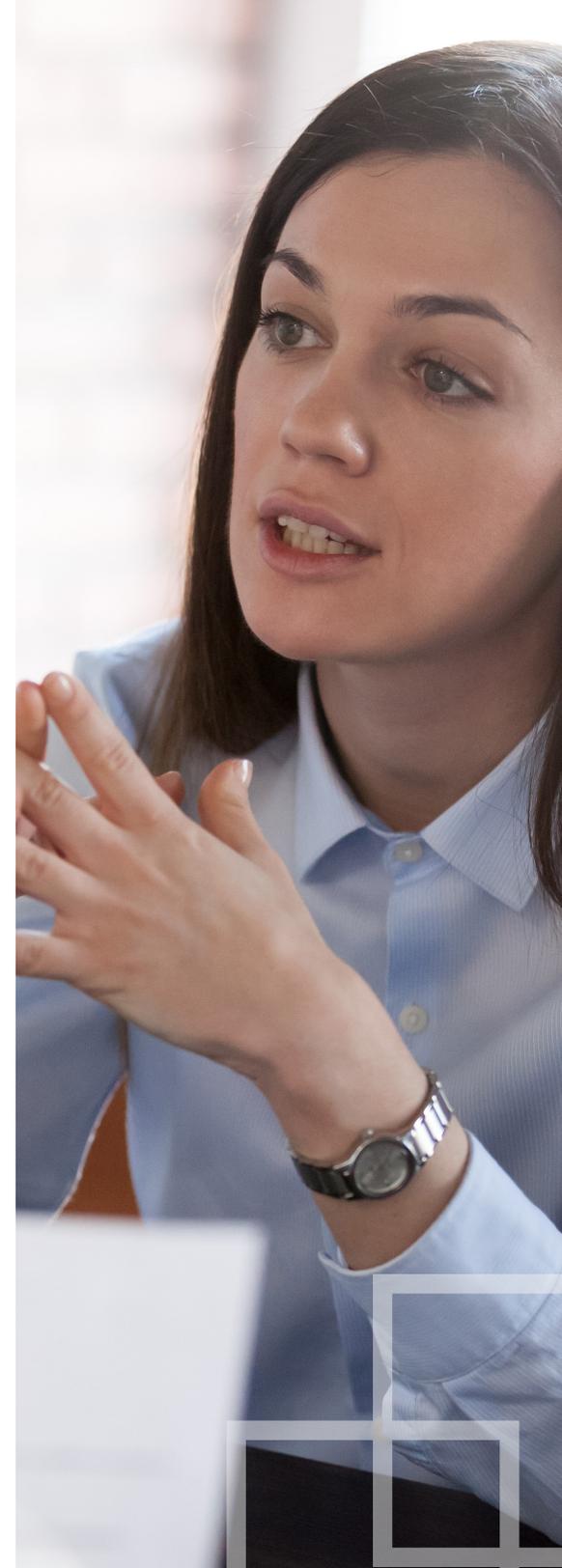
Combat fear with information and communication. Help your team to put aside preconceived notions about a new agenda and meeting management software. Technology is rapidly advancing in all areas of enterprise business solutions, and the most modern tools available today are intuitive, offer automated workflows, and are designed exclusively for the needs of local governments.

Understand that people accept change differently and at different speeds. Recognize that people tie their identity to the work they do, and that change can feel like a threat to their role. Stress that a new process won't change who they are, only how they complete a task. Finally, always foster and promote an "open to everything, attached to nothing" mentality.

Help staff members to understand that as a local government relying on taxpayer dollars, you owe it to your community members to routinely examine processes and ask if there are more efficient ways to conduct business. Finally, when addressing the question about the right time for a transition, when do local governments ever not have a lot going on? The longer you wait to make process improvements, the longer you wait to experience the benefits of modern technology.

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PART 7

Ensuring Team Success

Ensuring the success of your transition requires the right combination of team members. Build the best internal implementation team possible and then assign subject matter experts (SME) and power users for your new system and enable them to become internal leaders in the transition process.

As you prepare for go-live, bolster your training plan with additional internal open training sessions as well as scheduled vendor training sessions. Such meetings should include:

As you hold training sessions both with and without your software solution partner present, plan to differentiate instruction options to meet the needs of all learners. For example, you may require a combination of:

+ A discussion of process adjustments and enhancements

+ System use best practices

+ An open question and answer session even with some respectful frustration venting to address concerns and eliminate barriers to adoption

+ On-demand videos as refreshers and training for new hires & vendors

+ Documentation tailored to your processes and municipality

+ Departmental practice sessions

+ Internal lunch and learn sessions to generate enthusiasm and reinforce system functionality

Note: After you train your users, plan to maintain a parallel process with your previous system or procedures until you go live and fully convert to your new system. This approach will help to preserve knowledge and gain momentum.

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Your Final Go-Live Checklist

Ideally, you should select a vendor with years of experience implementing and configuring its software for municipal use. Still, as part of any implementation, it is wise to review these final go-live best practices:

Plan for touchpoints with board members

Share your revised process map with your implementation consultant or project manager

Decide what historical documentation you will import into the system taking into consideration the legal requirements of your jurisdiction

- Plan to post explicit instructions for how to access published records and access those that may be archived

Communicate the implementation plan to all

- Remind them of upcoming parallel and live dates
- Schedule training on key functionality as close to your live date as possible
- Ask for their patience as you master the new system

Final Words of Advice

Hopefully, the advice in this eBook has calmed your fears about the level of effort required to implement a new agenda and meeting management software. We are confident that by following these proven transition best practices that you will set your community up for long-term success with a future-proofed solution and time-saving workflows. As you lead this vital change in your administration, keep the following advice from our experts in mind:

- Keep your goals in focus especially when facing opposition or encountering roadblocks

- Accept that there will be bumps in the road and frustrations but that you can overcome them with strategic assessments

- Celebrate every success no matter how small

- Set goals for improvement and use metrics to track your progress

- If things aren't working don't be afraid to reevaluate and adjust—your transition process doesn't have to be static

If you're ready to start your search for a modern, time-saving agenda and meeting management software, click here to take a self-guided demonstration of CivicClerk®, the most intuitive way to automate agenda management, meeting minutes management, and the sharing of meeting content with board members, staff, and your community members. CivicClerk has been specifically designed to enable local governments to:

+ Streamline the entire agenda packet collaboration and approval process

+ Increase board member productivity with accessible, searchable records

+ Record roll calls, motions, votes, speakers, and discussions

+ Set administrator-specific access levels

+ Document and share interactive meeting minutes

+ Provide transparency and instant access to public data

+ Share live (e.g. Zoom) and recorded video with closed captioning using CivicPlus Media

+ Reduce paper and increase staff efficiency with mobile-optimized solutions

ABOUT THE AUTHOR

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As the Solutions Manager for CivicClerk®, Megan is responsible for ensuring the product continues to evolve to meet the ever expanding and shifting role of the clerk in the digital era. Before joining the product innovation team at CivicPlus®, Megan worked for over 12 years as a city clerk. She draws on her public sector experience as she works with CivicPlus' product developers and clients to customize the CivicClerk solution. Megan received the Certified Municipal Clerk designation from the International Institute of Municipal Clerks in 2014 and the Missouri Registered City Clerk designation in 2010. She has also been recognized among the "30 Leaders in their Thirties" Leadership Award by the North County Incorporated Regional Development Association of the St. Louis area in 2013.

About CivicPlus

CivicPlus® delivers technology solutions that enable local governments to optimize the experience they deliver when interacting with citizens. Over 4,000 local governments use our solutions when serving their 250 million citizens. We deliver the industry's first and only Civic Experience Platform. It enables local governments to drive more revenue, operate more efficiently, and generate positive recognition for the many services they provide every day. For more information, visit civicplus.com.

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