



WHITE PAPER

A Buyer's Guide:
Finding the Best 21st
Century Communications
Platform for School Boards

Like any other public service-oriented committee, school 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 these. 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 and storing the information used by school committees. 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 21st century digital solution is necessary. Not only does it provide better capabilities, but this new technology will reduce costs and help school 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 is inefficient. Perhaps the most egregious inefficiency is when meetings are derailed by out-of-date documents that don't contain the latest information.

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

Best practices for choosing and buying a school board solution

Choosing a modern digital solution to support school board activities starts with a buying process designed to deliver the 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 digital 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.





The critical features and functions for an optimized solution

Once the buying process starts, the next step is to prepare a list of critical features that the new solution must possess. This buying guide identifies the critical features that should be on your checklist. Your specific situation may require other capabilities, but this list will ensure that the most important features are included.

- **Security** – Information security is a critical capability. Ensuring that private information and non-public documents are protected is non-negotiable. This is where many rudimentary solutions, including Microsoft Office tools, such as Outlook (email) and Word, and public services, such as Gmail and Google Docs, come up short. It's essential that the solution protects both shared documents and individuals, and eliminates the common human errors that can result in data loss. The use of PDFs, which is quite common, is not an effective way to implement document security. Security features should also include document management and tracking, as these are critical components of strong cybersecurity capabilities.
- **Meet compliance and legal requirements** – Private, sensitive or personally identifiable information (PII) is now governed by many different laws and compliance guidelines. This also includes the relatively new demand for Americans with Disabilities Act (ADA) compliance. The platform you choose to support the school board must be able to meet all relevant requirements. More importantly, it should be designed with compliance as a native capability so that meeting future demands is far simpler.
- **Strong search functionality** – The most obvious demand for search is to simply find information or specific points in existing documents. However, that is not a complete solution. Not only must the search function be able to find the specific information, but it must be able to find it within its specific context to ensure that it is used appropriately. This contextual capability is also essential to finding related information that may be topical or that occurred in that same time frame.
- **Document management and tracking** – The ability to track individual documents as they are created, modified and distributed is an important capability to meet security and

compliance requirements. This tracking functionality also supports a strong “version management” capability that is critical to having a consistent set of documents for the board to use. In the unfortunate event that private or sensitive information becomes public, tracking capabilities can also be used to identify how the information was disclosed.

- **Ability to reduce costs** – It is no secret that school budgets are tight and the ability to reduce costs is critical. The right solution will start by reducing the time the administrative staff spends creating, updating and publishing documents for the board. The system must reduce the time it takes to make changes, and the use of electronic documents eliminates the time and cost of printing meeting documents, especially when it is done multiple times. Allowing board members to submit information, input it to the documents and make changes electronically dramatically reduces the inefficiency of doing such tasks manually. Further, an online environment that manages input from multiple sources eliminates the costs of compiling board documents.
- **Improved process for meeting and agenda management** – Although these activities are part of the solution’s document management and tracking aspect, they are important enough to call out separately. For the administrative team and some board members, agenda management is a continual problem. Making last-minute changes can wreak havoc, and it makes agenda management complex and time-consuming. The right solution will allow all parties involved to make changes with just a few keystrokes. Further, it allows committee members to finalize the agenda much closer to the meeting, making it possible to include recent changes that impact the meeting. And all of these changes are captured and included as part of the document tracking/version management system.
- **Deliver on “cloud economics”** – One of the most attractive aspects of cloud-based services for board document creation and management is the improved economics of cloud-based services. The school board does not have to make a capital expenditure request for hardware to support new software or bear the other costs of IT infrastructure.

The board need only pay for the services its members and staff actually use. And most cloud services have very high levels of reliability, ensuring that boards will have access to information and the service.

What to look for in a vendor partner

The capabilities of the product or service are obviously quite important, yet without a vendor that is committed to surrounding that product or service with the right capabilities, your customer experience will be less than satisfactory. For this reason, it is just as important to evaluate the vendor as it is the product.

The starting point for vendor evaluation is to consider their process and commitment to bringing your existing data and documents into the new system. Any vendor that recommends a “cut and shift” strategy where old information is left behind and the new system contains only information from the present and moving forward should not be considered. Legacy information is critical to the success of the new system and must be included. The vendor also should not charge a lot of money for bringing old information into the new system.

Once the issue of existing information is resolved, the next big challenge is training. Despite what some vendors promise, the reality is that even the most “user-friendly” system will require training so that all of the users (e.g., administrators, board members, school officials and support staff) can interact with the new solution efficiently. On-site human-based training is far preferable to online training that uses static training material. Every school board has some unique requirements, and human-based, on-site training is the most effective way to ensure that users can complete every aspect of their work. Finally, some vendors try to make training a “profit center” by using fee-based training. This is not a positive for the customer.

Your vendor of choice should also have a highly capable and responsive support team that solves problems quickly and accurately. Once the system is installed, customer support will become the primary determinant of the quality of your customer experience. For this reason, it’s important that your vendor of choice is committed to some important elements that define top-quality customer support. The first is to ensure that calls are answered quickly and without long

and frustrating “phone trees” that waste time. It is also preferable that the support team members have strong or native English skills. Some vendors have “offshored” support to save money, but if the offshore support techs can’t communicate effectively, it’s another place where customer frustration can increase.

The last aspect of your vendor evaluation is to understand the commitment and investment the vendor is making in this solution for supporting school boards. There are new features that will be necessary in the future, and to ensure that your vendor will provide them, it is worthwhile to look at how well they have responded to these demands both past and present. For some vendors, supporting school boards is only a small piece of their focus, or it is an outgrowth of a general-purpose product. Selecting a vendor that is committed to this specific solution – and has a focus on it – should be part of the evaluation criteria.

Key Takeaways

This buyer’s guide will help you make the best decision for improving the process for information management and document delivery for school 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 school 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. It is critical that, in your process, you evaluate both the product/service and the vendor behind it. The completeness of their offering matters a great deal.

“I would encourage anyone to switch to a full electronic board management solution, particularly BoardDocs. It’s extremely user-friendly, and the time and cost savings alone are worth the upgrade.”

— **Ann Naylor**
Assistant to Superintendent Dr. Cheryl A. Potteiger




Contact Us

BoardDocs has helped thousands of organizations dramatically lower costs, increase transparency and reduce time-of-staff by up to 75%. Because our solutions are so easy to use, your organization will operate more effectively from day one. BoardDocs' next-generation, cloud-based services allow organizations to improve significantly the way they create and manage board packets, access information and conduct meetings.

Questions?

Ask about our products, implementation or anything else.

 **Website:** BoardDocs.com

 **Phone:** (800) 407-0141

 **Request a demo at Boarddocs.com**

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Charlotte Valley CSD BoardDocs Proposal

8.2.23

Deliverables:	23-24 Vendor Fees	23-24 SCRIC Fees	23-24 Total
Vendor Implementation	WAIVED		\$0.00
Vendor Annual Maintenance	\$2,630.40		\$2,630.40
SCRIC Annual Maintenance		\$1,912.64	\$1,912.64
Total Fees	\$2,630.40	\$1,912.64	\$4,543.04

Deliverables:	24-25 Vendor Fees	24-25 SCRIC Fees	24-25 Total
Vendor Annual Maintenance	\$3,060.00		\$3,060.00
SCRIC Annual Maintenance		\$1,950.89	\$1,950.89
Total Fees	\$3,060.00	\$1,950.89	\$5,010.89

Deliverables:	25-26 Vendor Fees	25-26 SCRIC Fees	25-26 Total
Vendor Annual Maintenance	\$3,121.20		\$3,121.20
SCRIC Annual Maintenance		\$1,989.91	\$1,989.91
Total Fees	\$3,121.20	\$1,989.91	\$5,111.11

Pricing Proposal Notes:

The initial term for this proposal is 8/16/23-6/30/24.
 Vendor Implementation has been waived by the vendor.
 23-24 Vendor Maintenance of \$3,000 has been prorated.
 24-25 and 25-26 pricing is estimated based on a 2% increase.

Service Overview:

This service provides support for cloud-based systems that enable districts to upload, display, distribute, and store board of education business documents such as agendas, policies, and library items. Add-on features allow districts to record votes, enter meeting minutes, and display meeting information during your board meetings.

