



# **ENDING THE PAPER CHASE**

**Electronic Agenda Prep Saves Time,  
Money, and Reams of Paper**

**by Joan Randall**

Add up the numbers, and they can be staggering:

- 1-6 = Number of district staff members who work on the average paper board agenda packet
- 40-50 = Number of hours each of those staff members spends preparing the typical packet
- 150-500 = Number of pages in the average packet
- 2 = Number of pounds the average packet weighs
- 10 = Number of contributors to the typical agenda packet
- 6 = Number of file formats in which those contributors submit their materials
- 50 = Number of miles some district couriers travel to deliver the packets to board members
- \$2.10 = Amount that a gallon of gas costs in most Texas cities
- 3 = Number of hours it can take to locate information from a past meeting

“This was *not* one of the harder decisions I have had to make since being on the board,” said Jerry Johnson, a Burkburnett ISD Board member, about implementing electronic agenda preparation. “The costs are minimal, and the benefits are tremendous.”

The traditional board agenda preparation process is not a model of efficiency or an insignificant expense. The hours of staff time and reams of paper consumed in the process represent \$20,000 to \$30,000 annually to the average district. The opportunity cost of having a staff member hand-number 500 sheets of paper rather than performing other tasks cannot be easily quantified.

Electronic tools are available that streamline the agenda preparation process and liberate staff from the drudgery of collating and page-numbering, and many districts are taking advantage of them.

Districts that implement these tools save money and earn the gratitude of those who use them.

It is a misconception that electronic agenda preparation requires a district to outfit its boardroom with new wiring and that board members must sit at laptops during their meetings. Implementation is flexible, and districts can choose to “go electronic” to the degree they feel comfortable.

With electronic meeting preparation, the compiler uses special software to build the board packet. The different software tools available to districts offer varied sets of features. For instance, BoardBook®, TASB’s Web-based application for meeting management, converts all documents and supplements into PDF files. The solution includes electronic tools used by the “compiler”—most often the superintendent’s secretary—in the preparation and follow-up to board meetings, as well as two Web sites, a secured site for board member access and one for documents the district chooses to Web-publish.

“BoardBook was created with Texas school districts very much in mind,” states Patricia Horton, TASB’s BoardBook marketing contact. “Notice and agenda templates, for instance, reflect the requirements of the Texas Open Meetings Act; easily accessible within the application are TASB’s ‘best practices’ resources. In addition, we built the solution around the way that school districts customarily prepare board meeting documents and built in a great deal of flexibility to accommodate the uniqueness that each district brings to the task.”

“When I first attended a presentation, I thought, ‘This is awesome,’ because of what we went through to create the packets,” said Cindy Wright, secretary to the superintendent at Cypress-Fairbanks ISD. “You had to have so many deadlines, and when people didn’t meet those, then you had to hand out things separately at the meeting.”

How does a district decide how to implement electronic agenda preparation and, possibly, paperless meetings? The best research is to talk to districts that already have updated their process and then answer some key questions.

#### **Buy-in to the Process**

*Is the compiler of the agenda packet open to updating the process?*

The buy-in of the compiler is essential. He or she must be on board with modernizing the agenda preparation process, so the compiler should be included in research and demonstrations. Actually, in most districts, it is the packet compiler who is the greatest advocate for abandoning the old process.

“We had been discussing it for two years. If I had known how it would help me so much, I would have been saying,

‘Let’s do this now!’” said Valerie Dillard, secretary to the superintendent at Vernon ISD.

Pearsall ISD considered the switch to paperless meetings for a year and a half, then the superintendent, secretary to the superintendent, and technology director attended a BoardBook demonstration at Tuloso-Midway ISD, which already used electronic packets.

“It was even better than we anticipated it being,” said Dora Rodriguez, secretary to the superintendent at Pearsall ISD.

According to TASB’s Horton, BoardBook is an administrative solution that vastly streamlines the process of creating notices, agenda packets, and minutes, a process that is very labor-intensive without electronic tools. “BoardBook creates all those pieces in electronic format and, in doing so, builds a searchable electronic archive, a quantum leap over hard-copy files, and takes the essential first step toward paperless meetings.”

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Districts that have postponed instituting paperless meetings often say they delayed because both the implementation of the new process and learning the new software seem complex and overwhelming. The best way to determine if the compiler will be comfortable with electronic tools is by attending a software demo.

“Well, at the time, it did seem like it would be complicated,” said Rodriguez. Not only was it not complicated, Pearsall ISD was holding a paperless meeting one month after adopting BoardBook.

When Christy Ridgaway, secretary to the superintendent, took over board packet preparation at East Chambers ISD last May, the district already had been using BoardBook for two years. Unfamiliar with the software, she created a conventional paper packet the first month. “That was not pretty. I had pages laid out all over the table,” Ridgaway said. “There was *so much* paper. There can be 100 to 400 pages in a packet, and you’re looking at eight or nine copies.”

The second month on the job, Ridgaway decided to try preparing an electronic packet.

“I spent an hour on the phone receiving training, and that was enough,” said Ridgaway. “The basics are so much like other applications, there’s little to learn.”

“The majority of BoardBook districts,” adds Horton, “move to paperless meetings incrementally... and some see that final step in the far distant future.”

Horton notes that districts are using BoardBook in different ways, depending on how far along the path they wish to venture to paperless meetings. Some are using it only for compilation, with all documents output in hard-copy form; others are taking advantage of the ease of electronic distribution of board agenda packets to board members prior to the meeting but are backing that up and coming to the meeting with hard copy. Some are using the Web-publishing features of BoardBook to display selected documents through the district’s Web site; some have gone completely paperless with electronic distribution exclusively, use of electronic packets exclusively at board meetings, and Web-publishing notices, minutes, and agenda packets.

“We have not gone paperless because some of our board members are not comfortable with technology, but it has still saved me so much time,” said Nancy Ross, secretary to the superintendent at Manor ISD, which has used BoardBook since its creation. “I put together a 100-page packet in half an hour, and it used to take me a week.”

#### **An In-house System**

*Do we have the resources to build*



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*and maintain our own meeting management system?*

“We researched what other districts had done,” Cy-Fair’s Wright said. “Some had home-grown versions, and we thought about doing it ourselves, because we have a good technology department. Then we saw the TASB demonstration and saw that the work had already been done.”

Before purchasing the BoardBook application, Cypress-Fairbanks ISD conducted a thorough review of the costs of its options, including that of creating its own system. When researching an in-house application, a district should determine whether additional servers would be required for housing the system, if staff is free to maintain those servers, if an application developer is available to develop the program, and whether someone can be dedicated to upgrading it as needs change.

#### **The Time Factor**

*How much time is currently spent compiling materials and preparing the packet?*

The purpose of an electronic meeting preparation tool is to replace the painfully slow process of collating, copying, page-numbering, and binding. An added benefit of the TASB BoardBook system is that it

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“I spend probably half as much time as I would on a paper packet,” said Ridgaway.

Contributors to the board packet send the compiler materials in a variety of for-

mat—Word, Excel, PowerPoint. BoardBook converts the various files to PDF format and inserts each into the appropriate spot in the packet, automatically creating an index and then updating that index when materials are moved. Previously, the compiler had to hand-insert hard copies, move them when the agenda changed, and then renumber the pages manually.

“The savings in personnel cost was the biggest savings we saw. More time for staff to spend on other work was really the biggest benefit. What is the opportunity cost of having a staff member working on one project that long?” said Adam Feind, technology director for Midway ISD.

“I used to have to sit and number the pages, and there can be 500 pages in a packet,” said Wright. “This month the board will approve the district goals. The supplementary documents alone can be 100 pages each.”

Ridgeway said, “I keep up with it daily and then when the deadline comes, it’s done. There’s no scrambling the day before.”

Using a packet preparation application like BoardBook can be as helpful after the meeting as it was in preparing for it. The BoardBook software can construct an outline for the minutes based on the previously entered agenda information.

“We can just add what went on in the meeting and what the vote was, and it will automatically complete the minutes,” said Esmerelda Rodriguez, secretary to the superintendent at San Perlita ISD. “I’m no longer sorting pages and standing at the copier.”

“It’s saved my secretary so much time...in hole punching alone,” said Karla Wallace, superintendent of Vernon ISD, which has taken the next step and implemented paperless meetings.

“I don’t have to work overtime,” said Ridgeway. “I think that’s fantastic. I can go home and spend time with my family.”

### Counting up the Savings

*What costs can be eliminated by preparing the packets electronically, and how much is the initial investment?*

Cypress-Fairbanks ISD conducted a study of potential cost savings before implementing electronic meetings—looking at drive time for home delivery of the packets, paper costs, and archival research. At the time, the district estimat-

ed a net cost savings of around \$6,200 annually in staff time and in the printing, mailing, and delivery of packets.

The only initial investment necessary in the case of BoardBook is the software license and the appropriate version of Adobe Acrobat on the computers of the compiler and viewers, if they don’t already have it.

“The leadership from our board said, ‘Just do it,’” said Harold Rowe, assistant superintendent of Technology and School Services at Cypress-Fairbanks ISD. “We were looking for value. We looked at several products and then looked at creating something in-house. We made our choice based on features and affordability and ease of use.”

“My degree was in marketing, and there is a term in marketing called ‘post-purchase evaluation,’” said Paul Vranish, superintendent at Tornillo ISD, which recently implemented BoardBook. “You buy a plasma TV that you’re really happy with. What you do then—and it’s only human nature—is a ‘post-purchase evaluation.’ You wonder, ‘Did I really do the right thing?’ Last week, I was in San Diego at the NSBA [National School Boards Association] Conference, and I saw two other agenda preparation packages. I came away validated for the price and the value.”

Another misconception concerning electronic agenda preparation is that it will require a large investment of funds, remodeling of the boardroom, and purchasing numerous new computers.

Vernon ISD invested in a copier/scanner with an automatic document feeder, and Dillard said that it has been an indispensable purchase. Hard-copy documents are scanned and added to the meeting packet, making a scanner a practical one-time purchase.

“Even if I still printed paper copies for the board meeting, if I don’t print copies for the staff, am I not saving \$600 a year (the license renewal fee for BoardBook)? I can’t see anyone saying ‘no’ to that question,” said Vranish.

### The Flexibility Factor

*Do plans change as the meeting nears?*

“This has been a great thing for Pearsall ISD. I feel like I am so much more efficient,” said Dora Rodriguez. “I can use my time for something other than

reordering pages when something changes.”

And changes inevitably occur in the planning of a board meeting. With conventional paper packets, that can require hours of manual work by the staff.

**Contributors to the board packet send the compiler materials in a variety of formats—Word, Excel, PowerPoint. BoardBook converts the various files to PDF format and inserts each into the appropriate spot in the packet, automatically creating an index and then updating that index when materials are moved.**

“Yesterday, we were scheduled to have a meeting to approve an application that’s due to TEA [Texas Education Agency], and there wasn’t a quorum,” said Dora Rodriguez. “We have a doctor and two LVNs on the board—all were involved in emergencies. We have two board members who work out of town, and neither could make it. The application is due next week, so I rescheduled the meeting for Monday. All I had to do was insert a new date. I didn’t have to type anything.”

“We usually have two meetings a month. This month we will only have one,” said Wright. “I was able to go in and simply create a new notice template. Then, when this happens again in July, I won’t have to try to think, ‘Now, how did I do this last time?’”

In BoardBook, the compiler also can recycle agendas for recurring activities, such as the superintendent’s evaluation, and can work on multiple meeting packets at once, inserting new materials into the appropriate file as they are received.

## The Technology Perspective

*Do we have the technology tools and know-how?*

For BoardBook, the only resource needed is the full version of Adobe Acrobat on the machines of the compilers and viewers.

“From the technology perspective, it’s easy to implement,” said Feind. “There’s nothing difficult about it.”

Because Midway ISD uses BoardBook, implementation required only training the compiler and packet users and ensuring that the computers of BoardBook users had Adobe Acrobat installed.

Security and access are two things to consider when selecting a package. If the district does not have a secured server or a Web site, limiting access to confidential materials and allowing access for community viewing might not be possible.

In the case of BoardBook, the materials are housed on the TASB server; therefore, security for the secured area of BoardBook is managed by TASB. Technical support and updates are also provided.

“We do not have a secured server, and if we had to build one, it would have obviously been much more expensive,” said Pearsall ISD Technology Director Toni Holguin.

“Having it housed on an external server also gives it an additional sense of security,” said Feind.

Of course, having the server located externally is a significant benefit for districts without their own Web sites. It enables those districts to make the materials public without having to build their own sites.

## What about Support?

*Will we need support, and if we do, will help be available? Will the tool be simple to use or require special training? If it does require special training, is someone on staff qualified to offer it? Will the software provider offer ongoing technical support for questions that arise after implementation?*

BoardBook offers all users onsite training and ongoing technical support—from BoardBook staff, TASB IT staff, and BoardBook application developers—that’s only a phone call away, but many users don’t feel the need to take advantage of those benefits.

“We did the whole first meeting with-

out training,” said Vranish. “I had no training, called it up, and used it. The BoardBook staff was very proactive, calling to say ‘We’d love to help.’ But we actually didn’t need it. If someone were having trouble, what they wouldn’t have trouble with is getting help.”

Vernon ISD also moved from conventional to electronic packet preparation in one month. “It was very simple,” said

Dillard. “The technology director trained me one week, and the very next week I was using it. Since then, the BoardBook staff has been very patient and helpful when I have had questions. I don’t feel any hesitation to call and ask for help.”

## Allure of the Archive Feature

*How often is information from past meetings needed?*

# BoardBook’s Big beyond the Border

BoardBook’s success in Texas has created more than a flurry of interest in other states. As of May 1, TASB had recently entered into partnership agreements with school boards associations in six states—Oregon, Idaho, New Mexico, Nevada, Mississippi, and Utah—to offer an adaptation of BoardBook to their member districts.



With the assistance of the partnering associations, versions of BoardBook have been created for each of these states: TASB resources have been replaced with similar resources for each of those states; templates attuned to the Texas Open Meetings Act, for example, have been replaced with templates compatible with legal requirements for those states.

While these initiatives are just now getting off the ground, TASB’s Patricia Horton notes that the response among districts in these states is as enthusiastic as among Texas districts.

“The Mississippi School Boards Association is using BoardBook for its own meeting, and the whole staff is excited,” said Horton. “From Mississippi and the other states that have adopted BoardBook, we are hearing the same comments over and over: Everyone is seeing savings in money and time and pleased with how easy the application is to use. It’s worth its weight in gold, when you compare the benefits to the price. As people see demo’s, their response is, ‘How can we not get this? It’s a no-brainer.’”

The Pearsall ISD Board especially shares Dora Rodriguez's appreciation for BoardBook's searchable online archive, the feature that she says made electronic agenda preparation irresistible.

"Our board members are very happy not to have to store all those packets. One board member had a file cabinet full," said Dora Rodriguez. "Someone is always asking for things that happened two years ago. We're forever digging through boxes. I think that's the thing that pushed us over the edge. The savings in time and storage is tremendous."

"We're especially pleased with the archive because we have spent hours of time looking for information from past meetings," said Wallace. "We've had to rely on people's memories about when it was discussed and then start the long process of searching."

Even if paper packets are produced, because of the electronic archive, those packets can be recycled after the meeting rather than stored, saving space.

"Even if there were no cost savings, the time savings is valuable," said Johnson, whose board holds paperless meetings. "The ability to easily perform research has value. It is a great tool to have access to information from past meetings. The cost savings of not producing the paper packets and mailing them was secondary. Besides, the packets had gotten so large they wouldn't fit into the mail box any more."

### Sharing Information

*Is it important to the district to be transparent to the community?*

One indirect benefit of electronic agenda preparation is that it makes keeping the community informed easier. After deselecting confidential materials, the BoardBook packet can be posted on line instantly for the community to view. The compiler can select the items to share and add supplemental materials that would be of interest to the community.

Horton says that sharing board meeting information with the community seems to be an increasing concern among districts calling to inquire about electronic board packets.

Vernon and Cypress-Fairbanks ISDs have sections on their district Web sites for the public to access the packets, as does Austin ISD. "We've always made the materials available in paper form, but

there was such a volume of paper," said Rudy Montoya, an Austin ISD Board member. "Making the materials available electronically makes it easier for people to access and view them."

The compiler also has the ability to post information on line immediately, without the involvement of Web personnel.

"If it is important to a district to be public, including having the minutes where the community can see them, this program makes that easy," said Vranish. "Before, the Web staff had to go and post it every time you had a meeting. Now, all you have to do is add a link. BoardBook does it for you on the fly. It's updated constantly. If the Web staff got busy and forgot—it's kind of like someone driving by the school and the sign still saying 'Happy St. Patrick's Day.'"

And because the board packet is an electronic file, it can also easily be projected for the audience to view at board meetings.

"Projection of key materials during the meeting literally tends to keep everyone—board members and audience alike—focused on the same page and represents a very cost-efficient alternative to printing," said Horton.

### Setting an Example

*Is it a district goal to implement technology?*

In addition to cost savings and convenience, one of the top reasons boards give for updating their meeting process is the need to set an example of technology use for the rest of the district. Many districts have goals related to technology implementation and are using technology themselves to fulfill the district plan.

The implementation of state-of-the-art technology has been a district goal in Vernon ISD for the last two years. After seeing a demonstration of an electronic board packet at the TASB/TASA Annual Convention, the board returned to the district ready to research the options.

"We had been talking about it off and on," said Wallace. "I have watched my secretary load stacks of paper into the copier. We have a room dedicated to putting together the packets, and it was stacked sky-high with paper. We've had a push to use technology in the district, and we thought, 'We need to model that ourselves.'"

Johnson is a member of the TASB Board, which "went paperless" last year to model the efficiency of technology implementation. Impressed with the process, Johnson approached his superintendent to suggest modeling technology use at the district level, as well. The Burkburnett ISD Board meetings have been paperless now for more than a year.

"As new board members come on and the board changes, we've started to see it [electronic meetings] really as a basic standard," said Austin ISD's Montoya. "Also, it looks good when students come to the board, and they can see that we are using technology, too. The technology is readily visible."

### 'Going Paperless'

*Do we want to move to paperless meetings, as well?*

A district can choose to stop with electronic packet preparation—saving considerable personnel time and freeing staff to spend time on other work—but hold their meetings the same way that they always have. It depends on what a district most hopes to accomplish by "going electronic": increasing efficiency, freeing staff time, saving money, or eliminating paper.

Boards that have taken that additional step, doing away with their paper packets, say they have found it easy and convenient.

"Even a person with minimal computer skills can use this product," said Johnson.

The Cypress-Fairbanks ISD Board had only one training session before conducting its first paperless meeting. At its first meeting, each board member also was provided a hard copy of the packet.

"But the binders were all sitting on the floor beside them the whole time," said Wallace. "We actually trained during the board meeting. Only one board member had even a little difficulty, and he picked it up by the end of the meeting. In BoardBook, the board members can go directly to the page they need without scrolling down or flipping through pages. It's easy to follow."

Electronic packets bring convenience to board members as they do the staff who created them. In BoardBook, board members can make notes concerning sections of the document, highlight passages of importance, and quickly locate information.

"I find it very helpful as a board member," said Johnson. "I have a 130-page agenda packet, and I like to be able to highlight sections where I have comments so that I don't forget to make them in the meeting. Also, it's more convenient to receive a CD rather than the large paper packet."

"The board members like that they don't have to carry those big binders anymore," said Ridgeway. "They just show up to the meeting, and the packet is loaded onto the laptop there. Soon, we'll be able to do away with the CDs, too."

Because the packet is electronic, rather than including the lengthy supporting documents within the book, the Cypress-Fairbanks ISD Web staff links the files—items like the campus plans and long-term objectives—to the district's intranet. Board members in the meeting are able to click on a link in their packet and access the documents instantly.

"We first looked at it as a means to streamline the process," said Montoya. "We meet several times a month, so lots of paper documents were flowing to us. To have online access to the documents and be able to access them immediately has been very helpful. In fact, for us, our motivation [to switch to paperless meetings] was more efficiency than cost savings."

Feind said that implementation of an electronic packet also has made the Midway ISD Board meetings run faster. "It's easy for them to find their place in the packet. Board members can search for key words or phrases in the packet and can easily scroll to where they need to be."

Districts can distribute the packets to board members and staff any way they choose. Ridgeway, Dillard, and Wright download their board packet onto CDs and then onto laptops that remain in the boardroom.

Midway ISD provides each board member with a small portable data device, called a Flash drive, that can be attached to a PC's USB port. After the packet is downloaded off of the CD onto their home computer, board members can make notations in it electronically and then load it onto their Flash drive, which they carry to the meeting and connect to their laptop.

Copies of the packet also typically go to district personnel, and some districts



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are saving paper on these packets, as well. Pearsall ISD, in its effort to go completely paperless, even handles staff distribution electronically by e-mail. Vernon ISD delivers staff copies on CDs. Cypress Fairbanks ISD places the packets for board members on their own intranet in a secured area, and the packets for district administrators go on a shared district drive.

Equipping the district for paperless meetings doesn't have to mean prohibitive increases in the budget. There are as many ways to take advantage of technology in the meeting process as there are Texas districts—and district budget sizes.

The East Chambers ISD Board holds its board meetings at the district's professional development center, a multi-purpose district facility that is also used for in-service training and open houses.

Vernon ISD provides laptops to board members who request them and has purchased laptops for two board members. The other board members use their own home computers.

Cypress-Fairbanks ISD has equipped its boardroom with refurbished student computers; Midway ISD Board members use their own home computers. Feind points out that if the application is dependent only on Adobe Acrobat Reader (available free on the Web) for viewing, as BoardBook is, then any available workstation with Windows 98 or later could be used to equip the boardroom.

If a board is interested in "going paperless," there is no need to jump in all at once. Some districts have been using electronic agenda preparation for years and still use paper packets in their board meetings. Other districts, like Pearsall ISD, decide to do away with paper in a short time frame. The superintendent set a goal to go paperless in a month and coached the staff to make it happen.

"I'm glad he was persistent," said Dora Rodriguez. "We're paperless now, and we're ecstatic."★

*Joan Randall is assistant editor of Texas Lone Star.*