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## **Going Electronic: Legislative Document Management Enters the 21<sup>st</sup> Century**

If you sometimes feel as if you're working in the dark ages, you need to look into a new, updated methodology for agenda preparation and document management. Going electronic saves time, resources, manpower and gives your budget a new lease on life.

The following white paper will explore the problems of current methods, the latest in electronic agenda preparation and document management in the legislative arena, what is needed and the best possible solution available today.

### **Background**

The process of researching, building, publishing and distributing any legislative agenda can be arduous and extremely time consuming. Today, legislators are finding themselves having to deal with larger amounts of data from which to make their decisions and longer meetings with more agenda items to consider.

The most common problems with paper-based agenda preparation:

- Extremely labor intensive complexities of copying, revising and distributing
- No one can review agenda items until printing and distribution
- Time consuming transport of documents back and forth for submittal, revision or approval
- Last minute additions and revisions risk incomplete or missing critical items
- Administrative voting requires additional paperwork and accounting
- Minutes preparation can be an entirely separate work center
- Meeting results not immediately available to the public
- High storage costs for agendas and related documents after meetings
- Difficulty in researching previous meeting data

Because the agenda preparation process must coordinate old items plus new items from multiple sources, cross research must be conducted to insure each is complete and without duplicity. The timeframe for accepting new items varies widely, but paper-based agenda preparation must usually cut off acceptance two, three or even up to five weeks in advance of the meeting. For time-critical action items this can often have serious consequences.

Staff requirements for research, typing, copying, storage and minutes production are also higher when utilizing paper-based agenda process. Couple these extra staff requirements with the need for onsite and off-site document storage needs and it's easy to see why budgets are continually strained.

Legislatures and boards are busier than ever. Regular meetings are increasing in frequency and special meetings are proposed constantly. Since staff budgets are seldom increased to meet the needs beforehand, staff members find themselves stretched to the limit. Preparing and distributing multiple versions of the agenda as changes take place, tabulating and documenting voting results, preparing minutes and publishing the results for the public are taking longer and longer.

### **Moving Into The 21<sup>st</sup> Century Electronically**

Ever since the computer began taking over for the venerable typewriter, staff members have been able to produce more and better agenda materials. Research was given a boost by the growth of the Internet and online libraries. But even as pundits anticipated the "paperless office", electronic production seemed to compound the production of paper, especially in government.

Today, computers and workstations provide all the preparation input for the agenda process. But, it is still a paper-driven process for the most part. Three out of the four main points where the legislative process interfaces with the agenda continue to input, modify and reissue agenda items on paper, tons of it.

#### **The Four Main Interface Points**

- Initial Agenda Preparation
- Agenda and Meeting Development
- The Legislative Meeting
- After-Meeting Public Dissemination

By properly combining these four points with the productivity of computer input and the ubiquity of the Internet, a cost-efficient and staff-efficient result is finally possible. Taking each of these four interface points, the following discussion looks at the increased efficiency and reduced costs from properly combining efforts electronically.

### **Initial Agenda Preparation**

Prior to any legislative meeting, whether regular, special or closed door, the agenda must be prepared and items must be accepted. Using in-house computer-based input of desired agenda items is already being accomplished. By tying together a secure system through the Internet, the agenda items can be submitted by any of the participants or the public with a computer and access.

Formatting, inserting, modifying, duplicate checking and removal can all be done in real time by the staff members coordinating their efforts through efficient electronic routing. An absolute necessity for any large business, the workgroup concept of easily sharing and contributing through a computerized network is ideal. Besides the convenience of printing out any or all items for a specific meeting, similar or duplicate agenda items occurring in concurrent or overlapping meetings can be easily identified.

With a well-designed electronic system, the early preparation and input acceptance for multiple agendas can be accomplished efficiently. By then coordinating the workload for each meeting, properly utilizing staff, controlling overtime and reducing the need for possible temporary staff becomes a reality.

### **Agenda and Meeting Development**

In the paper-driven agenda preparation process, this is the most time-consuming and expensive portion of the entire legislative meeting process. When properly designed, the electronic process streamlines the input, changes and initial approval of items to effectively cut total preparation time at least by half.

Newly submitted items for legislative consideration can be seen as they come in. Action items from previous meetings can be tracked as situation reports are added to them online. Supporting information, reports and documents are linked directly to the agenda item so anyone can do early research prior to the agenda being produced. Last minute changes are quickly and easily accomplished.

But where the electronic system truly saves the most time and money is in the copying and distribution effort. Classically this has been very expensive in terms of manpower and budget as items are added, modified or cut from the agenda. Printing up large amounts of copies, sending them to various recipients and then recompiling after their input costs an enormous amount in personnel and resources. In the electronic system, all approved staff and legislators can watch the agenda as it is being built, making changes up to the last minute without having to reprint, copy or redistribute.

### **The Legislative Meeting**

Using the agenda during a meeting, additional paperwork must be completed to document roll call, the votes and to write the minutes. When operating under a properly designed electronic system, these should all be completed as they happen. Tabulation of votes, discussion, approval or moving of action items should be completed as they happen and immediately put into the draft minutes.

Most meetings are video taped to provide not only a record of the events but also to allow confirmation of notes or resolution of conflicting opinions on agenda items. The properly designed electronic system should not only provide recording, but also time-stamping, coordination with minutes and easy replay options for participants or constituents.

With access to the Internet, meetings now have the ability to be broadcast online for constituents to watch in real time. With each major discussed action item time and date stamped for replay, true staff and public access by computer anywhere is a reality. At the very minimum, by the time the meeting has adjourned, every participant should have access to the draft minutes to confirm their own notes and be able to replay portions of the meeting.

The desired electronic features can provide significant budgetary savings through reduced staff needs at and immediately after the meetings. With automated inclusion in the draft minutes, every aspect of the meeting can be tracked and documented by fewer staff members.

### **After-Meeting, Public Dissemination**

Properly implemented, the electronic process can have results of the meeting available to staff and the public immediately. The minutes can be taken from draft to final and available online quickly and easily. Agendas and their

related documents and records can be archived and also made available for public access through the Internet. Ideally, the recorded meeting should be time stamped to allow viewing salient points or actions taken via major agenda items.

With modern storage and archiving of meeting agenda and materials, public and staff search and retrieval of records and information is easier and more efficient. Records can easily be made available to researchers and archivists for historical documentation.

Utilizing the recorded meeting, sections or the entire proceedings can be placed on CD-ROM for public sale or dissemination. Everything should be available by keyword, date or other criteria.

### **A Real-World Example**

The city of San Carlos, California, near San Francisco, recently made the move from a paper-intensive, manual system to a fully integrated electronic system utilizing secure Internet communications. The system they chose was the Total Legislative Management Solution provided by AlphaCorp of West Valley City, Utah.

#### City Clerk's Office

- 160 employees for a city of 27,00
- Provide agenda development and management for city council meetings
- Attend meetings, produce minutes, publish results, archive documents
- Responds to research requests

#### Old Manual System

- Coordinate input to agenda from public and department heads
- Manual keyword records retrieval search and storage
- Utilized hand-written notes with cut-and-paste updates to agenda
- Print and reprint agenda prior to meetings
- Write up summary minutes during meetings

#### Problems to be Solved

- Finalize agenda no sooner than one week prior to meetings
- Locating and including staff reports in a timely fashion
- Detailed note taking requiring 10 hours post-meeting time to produce draft minutes
- Reduce time and cost of records storage and retrieval

#### New Electronic System

- AlphaCorp SIRE Agenda Plus integrated with Granicus Video and Minutes System

#### Improvements in Operation

- All input to agenda is done online in real-time
- Staff reports are added directly by department heads
- Managers can now approve agenda items before finalization
- Agenda does not require multiple printings – now only one copy just prior to meeting
- Action minutes are taken with time stamps and used to tag video of meetings
- Meeting agenda, results and video are published almost immediately post-meeting
- Agendas, minutes, items and video are all electronically stored for fast retrieval
- Staff and participants can do their own research directly

#### Real World Benefits of Going Electronic

- Scanning and copying of staff reports for agenda inclusion eliminated
- Offsite storage costs of \$1,000 per month eliminated
- Minutes preparation time reduced from 10 hours to about one-half hour
- Major reproduction and distribution cost savings from having agenda available online
- Staff freed up for other tasks

#### Overall Time to Implement

- SIRE Agenda Plus – 2 months to full time staff use in council meetings
- Granicus Video System – 4 months from installation to full operational use

### **The Importance of Involvement**

One very important point about the process of going electronic stressed by all those who have accomplished it: dedicated involvement. One key person must be empowered by the legislative body to undertake the implementation of the new system. That person must be able to draw upon required resources to work with the consultants who will install the system while keeping the legislature apprised of the situation and progress.

### **Taking The Next Step**

If your city is still conducting manual agenda preparation having staff stretched thin with increasing distribution and storage costs, you need to move forward into the 21<sup>st</sup> century by going electronic. With the ubiquity of the Internet, especially in government offices, streamlining all aspects of the legislative process by utilizing its presence is obvious.

The first step in going electronic is realizing there is an answer. Technically, AlphaCorp's Total Legislative Management System, with its electronic agenda development preparation, document storage and retrieval, meeting video and minutes integration and public dissemination system is the answer. Their rapid growth and long list of highly satisfied clients attest to both their products and their skills at solving problems inherent in the legislative agenda, meetings and documents management process.

Start by analyzing your entire process and calculate those critical points where it drains your budget and staff availability. Then contact AlphaCorp to have one of their consultants provide you with a complete picture.

### **About AlphaCorp, Inc.**

AlphaCorp, Inc. develops, delivers, and supports electronic document management and agenda automation software called SIRE (Store, Index, Retrieve, and Exchange). This powerful product suite helps business, governmental, and educational organizations dramatically reduce the costs of manually processing, storing, and retrieving their documents and information. At the same time, SIRE helps them increase their productivity, profitability, and security.

AlphaCorp has an ever-expanding customer base made up of hundreds of installations. These customers primarily come from (1) local government, (2) courts and law, (3) education, and (4) corporate and small business. Their clients are fiercely loyal because of the high level of expertise and professionalism exhibited throughout the entire company.

AlphaCorp was founded in 1983.

The SIRE software product suite comprises a number of applications built on customer input and with the latest technologies. These products include:

- SIRE Capture—Scan and index your documents electronically.
- SIRE FileCenter—Search and view your documents electronically.
- SIRE WebCenter—Search and view your documents from the Internet.
- SIRE Workflow—Electronically manage work processes and workloads.
- SIRE Records Management—Retention and disposition for electronic and physical documents.
- SIRE Agenda Plus—Manage your legislative agenda process electronically.
- SIRE Forms—Create, distribute, process, store, and retrieve forms online.
- SIRE ERM (COLD)—Turn computer-generated data into searchable and archivable reports.
- SIRE API—Integrate other applications with your SIRE solution.

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