



BoardDocs[®]
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Community
BY DILIGENT

Modern Governance for Public Education

The How-To Guide

Modern Governance for Public Education: The How-To Guide

“Leading in today’s moment means you take the burdens, you take the scrutiny, so the others who are there to serve do not have to worry about those things.”

Dr. Romules Durant

CEO & Superintendent, Toledo Public Schools

“Lead the moment” was the challenge issued at the outset of Diligent’s Modern Governance Summit 2020. Brian Stafford, CEO & President of Diligent Corporation, along with Dr. Romules Durant, CEO & Superintendent of Toledo Public Schools, opened the Summit by acknowledging the trials of 2020. They then highlighted the silver linings that have shone through in these times of adversity and challenges.

Durant stressed that relationships and partnerships across community organizations are powering essential services. From childcare services for teachers, to groups feeding children over the weekends, to organizations offering online tutoring, communities have come together to support districts like his, in which over 90% of the students live in poverty. Durant also pointed out the importance of support staff across districts – the clerks and administrative assistants who have been called on to learn new technologies so that they could teach it to board members. All the while, they leverage that technology to continue creating agendas and sharing materials to keep the district functioning.

Throughout the Summit, attendees and presenters highlighted the need for technology in a rapidly changing environment. And they demonstrated how they’re applying best practices in:

- **Strategy & Governance**
- **Security & Collaboration**
- **Risk & Accountability**

This guide includes many of the Summit’s key insights and steps that board/superintendent teams can take to continue leading in a time of great adversity.



STRATEGY & GOVERNANCE

Best Practices

Be inclusive in change, bringing in all key stakeholders and ensuring training is available.

Streamline workflows by leveraging administrative efficiencies such as remote agenda building and collaboration.

Train board members in the use of live electronic voting, so the public can see them making decisions and acting.

Enable Best Practices With BoardDocs

Use the goal-tracking feature in the BoardDocs Library to maintain focus on progress toward agreed-upon standards.

Post in the Library any documents that would be of interest or help to public stakeholders.

Utilize BoardDocs' programmed automatic public release feature to ensure compliance with legal regulations like open meetings/sunshine laws.

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Embracing Virtual Governance

At the outset of the COVID-19 pandemic, organizations focused intently on adapting to virtual work, operating in a holding pattern until the pandemic subsided. Now however, what seemed like a short-term transition to virtual work has become a long-term reality. Many organizations quickly made the adjustment to virtual board meetings, and now other governance processes must follow.

Throughout Modern Governance Summit 2020, representatives from a number of boards and councils discussed how they are using this high-stakes transition period to hone efficiencies, set and achieve goals, and be better stewards of the districts and communities they serve.



“We already had BoardDocs, so we were in good shape to transition to virtual when an emergency arose. We were much better prepared than we thought.”

Cindy Gray
Executive Secretary, Huntington County School Corporation

Through virtual public participation and quick access to documents, school districts have broken new ground in how they relate to all community stakeholders. One tool they have taken advantage of is the BoardDocs Library, which makes relevant information and documents more accessible to all members of the community:



“Our community embraced BoardDocs so quickly because of the transparency. All the stakeholders are happy with the way we are presenting their government’s documents.”

Cindy Coulton
Executive Assistant and Superintendent & School Board Clerk,
Roanoke County Public Schools

One bright spot of the pandemic: The move to virtual governance has allowed local governing bodies to increase access to community members who had previously been unable to participate because of barriers including language differences, physical disabilities, or financial and childcare issues.



SECURITY & COLLABORATION

Best Practices

Secure and public information related to a topic should be combined on an individual agenda item, with the secure info masked, so board or council members need only look in one place.

Use one-way communication tools to ensure compliance with open meeting laws.

Maintain up-to-date policies in a digital format, ensuring all administrators are working from the most recent version.

Enable Best Practices With BoardDocs

Use built-in security fields in order to protect sensitive personnel or student data and to comply with HIPAA and FRPA regulations.

Set permissions for both secure and public information within one agenda item in BoardDocs.

Collaborate within the BoardDocs platform to ensure proper version control and one-way communication.

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Securing & Protecting Sensitive Information

Navigating this new, virtual world means remaining aware of the risks that lie beneath the surface. This requires renewed attention to the information boards share — and how they share it.

Effective boards recognize the risks associated with unsecure workflows, document transmission and communication. Control of sensitive information is essential. Leaked information related to new coronavirus outbreaks or staffing cuts could lead to discontent, speculation and eventually public mistrust.

Dr. Romules Durant, CEO & Superintendent of Toledo Public Schools, pointed out that his district has battled offshore cyberattacks that exacerbated the already difficult issues related to educating students during a pandemic. BoardDocs' secure platform, which Durant's school district uses, keeps confidential data encrypted; despite the attacks, the district never had to worry about private board information being leaked.



“BoardDocs has been essential in our operation to how we go about district board meetings, committee structure meetings [and] communicating transparency to the community.”

Dr. Romules Durant
CEO & Superintendent, Toledo Public Schools



Best Practices

Build it before you need it; districts that had the easiest transition to virtual meetings already had some digital practices in place.

Centralize documents, with the ability to set different access and security levels.

Post real-time updates as guidelines and protocols change.

Enable Best Practices With BoardDocs

Leverage BoardDocs as a central repository for both public and secure documents, using features like the Document Library.

Make announcements through BoardDocs to keep the public updated on policies.

Use BoardDocs META Search to learn how other districts are adjusting guidelines and protocols.

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Improving Access to Information

Even as many schools and events are slowly reopening, an informal poll taken during Modern Governance Summit 2020 indicated that about 90% of school boards are continuing to meet either in a virtual or hybrid format. Documents must be readily accessible to board members, the community, parents and taxpayers, all in an easily navigated format.

In his keynote address at the Summit, Diligent's Chief Product Officer Ken Surdan spoke to the accessibility and searchability of the BoardDocs and Diligent Community products. This functionality was designed to "preempt some of those phone calls" that slow the work of busy administrative assistants who have to stop and search for the requested documents.



"I was thrilled when I realized the BoardDocs Library capabilities. It has been a lifesaver for me. It's easier for me to find the documents ... very quickly and very efficiently, all in one place."

Cindy Coulton

Executive Assistant and Superintendent & School Board Clerk,
Roanoke County Public Schools

The BoardDocs platform empowers users to locate their own information, freeing staff members to channel time and energy into leading strategically. Information loaded into the policy console can be tagged for annual review requirements. Administrators can be sure they are working from the most up-to-date policy or regulation.



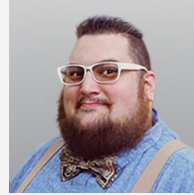
"It is helpful ... to be able to search for supporting evidence [in BoardDocs] to link to our accreditation report. We also link our board goals and strategic education master plan."

Adriana Sano

Executive Assistant to the President,
Imperial Valley Community College District

Auditors and other stakeholders can easily find the information they're looking for. Community users can self-subscribe to updates and agendas, and BoardDocs allows districts to easily distribute items via a variety of channels including email and social media.

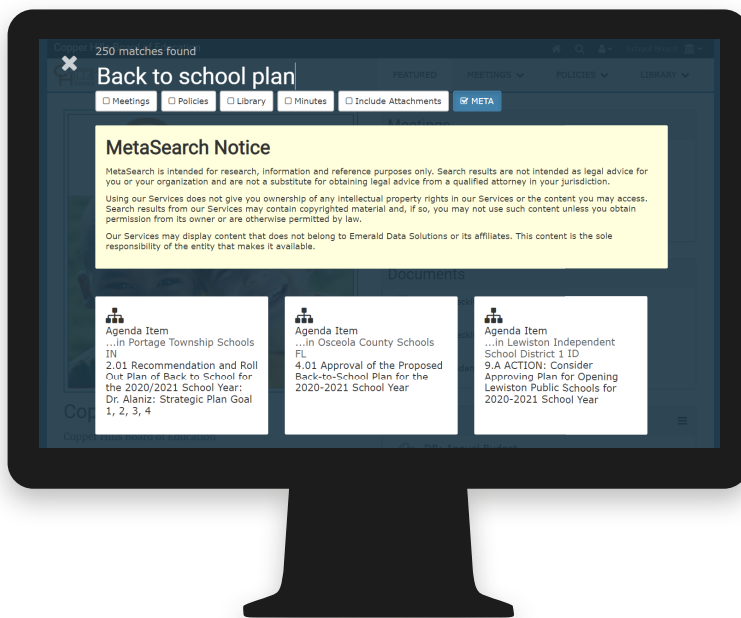
In a time of separation and change, the Modern Governance Summit created opportunities to share best practices and key insights, network with other governance professionals from around the globe, and refocus on what it looks like to come out stronger on the other side. Repeatedly audiences heard references to partnerships, relationships and support networks. Diligent Chief Product Officer Ken Surdan summed it up best: **“No one does it alone, and together we can thrive in the brighter world we are all building.”**



“Moving to BoardDocs has allowed us to collaborate better, to set up the workflows and approval trees we need to control how things move, and it’s been great.”

Ryan Hale

Web Master, BoardDocs Support,
Network/Server Performance Monitor,
Designer, Akron Public Schools



Community Is the Next Generation of BoardDocs

Community by Diligent is the next generation of the industry-leading solutions, BoardDocs & iCompass, trusted tools used by over 4,000 public governing bodies. The intuitive, easy-to-use paperless meeting software supports public leaders and board members to streamline the way they build agendas, distribute materials to the board, and communicate with constituents and before, during and after public meetings – whether in person or virtual.

In a time of enhanced risk and disruption, make sure your board has the right information. Schedule a BoardDocs demo today.

Call: 800-407-0141 | Visit: boarddocs.com

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