City of Marion

Minutes and Agenda Software Solutions

What was the problem?

- 20 year old process
- Clunky and repetitive
- Word Based documents
  - Hard copy reports / approval
  - Reports getting lost
  - Human error
  - Manual processes
  - Time consuming
  - Version Control

What we were looking for?

- Integrated system
- Cloud based
- Good search ability
- Reduce duplication of processes
- Easy reporting and approval processes
- Online action log and follow up
- Automation

How did we get it?

- Engaged with staff and Elected Members

- Engaged an IT Consultant with industry knowledge

- Public Tender

- Tender Panel included ICT, Governance, Contracts and Development

- 5 submissions & 3 shortlisted

- Received demonstrations of three different products

What we got?

- Brand new technology
- Partnership with CAMMS
- Cloud based product
- Reduction in duplication of effort
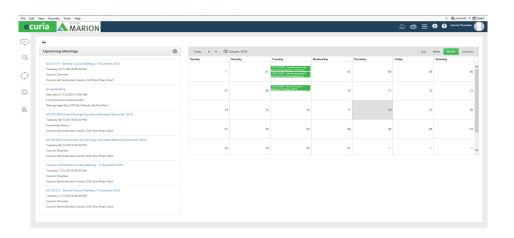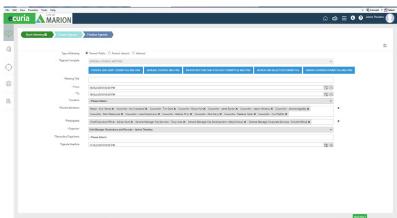- Consistency in how reports are presented

Benefits

- Signal sign-on
- Online notifications and approvals
- Customised templates that we can alter
- Calendar of meeting and a schedule of upcoming items
- Action centre – staff see what resolution are assigned to them and all of their reports
- Confidential reports are locked down to those on the approval
- Ability to use the system for internal management meetings
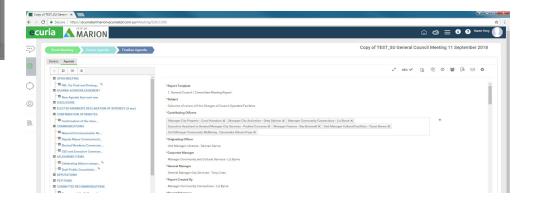
The Solution

Implementation

- Implementation due date 30th June 2018
- Project implementation resource
- Established new report templates
- Implemented the agenda production first followed by the minutes
- Ran two systems concurrently
- Training of staff
- Managed issues in partnership with CAMMS

Learnings

- Project Resources
- Make time for reviewing all processes and be prepared for change
- Be mindful of implementation date and what is on the agenda.
- Keeping the vendor on task
- Implementation due date & teething issues