

# Central Utah Water Conservancy District's Agenda Management Story: 50% Time Savings and Greater Accuracy

## OBJECTIVES

- Improve Workflows
- Increase Productivity and Collaboration
- Boost Accuracy

## RESULTS

- Agenda Management Labor Time Cut by 50%
- Access to a Single Source of Truth
- Greater Accuracy
- More Balanced Workload
- Enhanced Productivity and Collaboration

## The Challenge

### THE INITIAL IMPLEMENTATION

CUWCD's OnBase story began in 2010 when it implemented OnBase for its electronic records management. Prior to this, CUWCD had used a different solution through which their invoice approvals, PO approvals, and employment application process were all paper-based.

When OnBase came on board, CUWCD was able to put all these processes into workflows. As a result, it was able to enjoy the benefits of reducing paper, from time savings to enhanced productivity, and minimized risk surrounding losing documents.

And this was and continues to be a huge gain for CUWCD. As Mandy McClellan, Records Manager at CUWCD, remarked:

**"I just think workflows are just amazing. We've put other forms into workflows that just have been so helpful"**

*-Mandy McClellan, Records Manager, CUWCD*

### INVOICE APPROVAL

An early component of CUWCD's OnBase solution was invoice approval. CUWCD has an integration with its finance system, which consists of a couple of integrations:

- One of the integrations pulls information from the finance system into the index fields for the invoices.
- The other integration pulls the checks from the finance system, and once they're cut, it brings them into OnBase and cross-references them.

## **EMPLOYMENT APPLICATION**

Another early function of OnBase for CUWCD is the employment application, which became its first unity form. Initially, applications consisted of a paper process that required applicants to visit the office and fill out a lengthy paper form.

Thanks to Unity Forms, the application can now be filled out online. Once it's filled out, it enters a workflow that promptly gets the application to the right staff, making it a far more time-efficient process for both CUWCD employees and applicants.

## **Expanding OnBase to Agenda Management**

### **THE CHALLENGE**

But alongside these wins, CUWCD was facing significant inefficiencies in its agenda management process. When CUWCD has a board meeting, it has six committee meetings, a work session, and a Board Meeting. Lisa Anderson, Executive Assistant at CUWCD, was responsible for creating an all-encompassing document to serve all functions of this board meeting. The issue was, each document consisted of a packet between 175 and 250 pages long. That's a lot of paper—especially considering that Lisa had to print 25 copies to be given to the different trustees and staff who needed copies.

During COVID-19, these meetings had to take place virtually, which made the process even more complex. In addition to the previous content she already had to add, Lisa had to include all the presentation slide content just in case someone couldn't join virtually or if Zoom or Teams happened to be unavailable and the meeting had to take place via phone.

But this meant that Lisa had to contact all the departments to get hard copies of the content they wanted included. Then, she had to create an agenda packet in Word. Then, Mandy put all the content into OnBase so everyone could view it. Still, only a single person at a time could work on the document. And from time to time, someone would accidentally leave the document open on their computer and forget about it, and Mandy would need to go in and remove them to let others in, which was frustrating for all.

Once the agenda content was ready to go, Lisa had to turn it into a PDF and email it to everyone to see if any final changes had to be made. Unfortunately, the potential for a person to accidentally make changes to an old version of the document was high, especially since Lisa was receiving information from 10 different people just to compile a single packet. This made it an uphill battle to ensure that all 17 trustees had accurate information to review.

And with so many responsibilities on Lisa alone, the chances of inaccuracies were inherently higher. As Lisa put it, "I was entering everything and doing the review myself, so I was the only set of eyes reviewing it, which made it possible to miss things here and there."

Lastly, making last-minute changes was tough, too, requiring manual renumbering and reprints, which was extremely tedious and resource-intensive given the size of these packets.

### **FINDING A SOLUTION**

In July 2022, Mandy came across an idea that would change everything. That month, she attended the National Archives conference and heard a presentation on OnBase's Agenda Management solution. There, she got to speak with the presenter to learn more, and she brought the idea back to Lisa.

Lisa remembers, "That was kind of the tipping point when Mandy said, 'I think I have a solution, I think there's something that could work,' and that's when we started meeting and discussing OnBase as an option." It helped that CUWCD already had OnBase, and the Agenda Management function showed the potential to solve their inefficiencies, so they decided to move forward.

## The Benefits of Agenda Management

### TIME SAVINGS

Agenda Management has saved CUWCD staff, especially Lisa, significant time in multiple ways:

- **It's easy to implement changes**, including last-minute ones. This is a huge contrast from the previous process, when Lisa had to manually renumber and reprint copies to accommodate last-minute changes.
- **There are more sets of eyes on the content to check for inaccuracies.** Right now, CUWCD has two administrative assistants. One enters 3 of the committees' content, the other enters 2 of the committees' content, and the finance department enters its own committee's content. Then, at least 10 staff members proofread the document, which has been a big win for accuracy.

Even more, Lisa states:

**"I would say labor all the way around is probably cut in half because everything can get done electronically first, then approved and changed electronically too, instead of emailing back and forth and potentially missing people. Plus, they're located in one place, so no one can work from old versions."**

*-Lisa Anderson, Executive Assistant, CUWCD*

### MEETING PREPARATION IS SMOOTHER

All administrative assistants have to do is enter the titles of necessary items and put "X"s in front of the items that require attention, which makes filling out the information more straightforward. But it has another side benefit: It helps the team estimate how long a meeting might take, which previously wasn't possible.

### APPROVALS ARE TRACKABLE

The workflow component has provided a reliable trail for Lisa to track who has and hasn't viewed and approved what. This means there's no longer any doubt regarding who's seen what.

### ENHANCED CONSISTENCY

Taking the process into OnBase's Agenda Management solution has meant that everyone is required to enter their information into a unity form built with a standardized template, which has made a huge difference in consistency and uniformity throughout the packet.

### BETTER COLLABORATION

Agenda Management also allows multiple users to work on the same document at the same time, and everything saves properly, bringing both consistency gains and enabling collaboration. As a result, there's no longer any need to remove users from the document after leaving it open for too long, and there are no more multiple versions of documents. This has led to far better consistency and accuracy in information, and it saves staff time, as they can get into the document and do their part at any time without having to wait for their turn.

As Carolyn Quigley, Administrative Assistant at CUWCD, said:

**“Using the OnBase and Agenda Management system has helped me with collaboration, minimized the possibility of errors, and increased my productivity. It has helped in allowing the District to be well documented mitigating potential risks to the business.”**

*-Carolyn Quigley, Administrative Assistant, CUWCD*

### **WORKLOADS ARE MORE BALANCED**

Since the two administrative assistants are involved, the workload is more balanced overall compared to Lisa being responsible for all the work. This change is greatly enabled, too, by the fact that multiple people can go in and work on the document at the same time and still be guaranteed to be looking at the same version.

### **MORE EFFICIENT MINUTES**

Thanks to Agenda Management’s set templates and CUWCD’s new process ensuring that the prep work is done ahead of time, Lisa has enjoyed significant time savings. She said:

**“As far as time savings go, I would say I am probably 75% faster with minutes now because I can do what I need to real-time in the system, and I can rearrange things right there, so it’s made the whole process go a lot faster.”**

*-Lisa Anderson, Executive Assistant, CUWCD*

## **Getting Employees on Board**

Change is never easy. Even though CUWCD wasn’t new to OnBase when it implemented its Agenda Management solution, this new use of the system was absolutely new to employees, and that left some feeling resistant. Lisa and Mandy cited a few different strategies that helped them get everyone on board in the end:

### **OPEN, TRANSPARENT COMMUNICATION FROM THE START**

Lisa emphasized the importance of communicating transparently, often, and from the beginning. As soon as the planning phases began, Lisa and Mandy met with the individuals who would be involved in the process.

### **BE AVAILABLE FOR HELP**

Lisa and Mandy also made sure to be readily available to sit with anyone who needed help, which was extremely helpful. This way, if anyone felt confused or unsure, they knew where to go for step-by-step guidance or reassurance that they had performed the process correctly.

### **INCLUDE EVERYONE INVOLVED**

They even made sure to include the administrative assistants, who sometimes end up receiving information secondhand from their managers, but Lisa and Mandy wanted to directly involve them from the start. This idea ended up being a hit, too, as the administrative assistants were able to provide valuable feedback. The decision to include these employees also helped Lisa and Mandy get their buy-in almost immediately, which helped kick off the entire project event stronger.

### **GROUP TESTING**

Lisa and Mandy also decided to take a collaborative approach to testing. They set up Teams meetings where they'd do live tests that involved everybody. Including everyone in the testing not only made the testing itself more effective, but it exposed everyone to the new process and technology early and helped them take ownership over the change.

At the end of it all, though, there's nothing quite like seeing the benefits of a new solution firsthand. "We had people who just didn't like OnBase to begin with, so they were resistant," remembered Lisa. "Still, the benefits have gone a long way in winning the more hesitant people over. One of the biggest changes that have enticed people to OnBase is the fact that multiple users can work on a document at the same time without getting locked out and needing Mandy to go unlock it for them."

Mandy agreed, "They would need to track me down to unlock it or wait for me to unlock it, and I know there was a lot of frustration around that, so the fact that we don't have to do that anymore is huge. **People are so much happier!**"

## What's Next for the City of Central Utah Water Conservancy District

Through this entire process, Lisa and Mandy have been happy with their experience working with Naviant. Lisa was especially impressed by the Naviant team's flexibility in working with CUWCD's unique agenda management process and creating a solution for it that was unlike any of the other agenda management solutions they had designed before. Mandy said:

**"I love Naviant support. I cannot rave enough about how responsive and helpful they just really are great and the implementation team was really good."**

*-Mandy McClellan, Records Manager, CUWCD*

Going forward with this partnership, CUWCD aims to eliminate all printing involved with the agenda management process within the next two to four years. Mandy is also interested in implementing a Records Management solution, especially to help with document destruction.