Resources Overview and Scrutiny Panel

Agenda Item:

A.2(b)

Meeting Date: 4th April 2013

Portfolio: Finance, Governance and Resources

Key Decision: No

Within Policy and Budget Framework   NO

Public / Private   Public

Title: **SAVING PAPER TASK GROUP – Update Report**

Report of: Scrutiny Officer

Report Number: OS 09/13

Purpose / Summary:

In September 2013 Members of Resources O&S Panel requested that a Task Group be set up to look further into saving paper within the democratic process. The Task Group reported back to the Panel on 6th December with their findings made several recommendations, including a recommendation to undertake a pilot of using Tablet technology in Committee meetings. This report updates the Panel of the outcome of the pilot and the progression of the other recommendations made by the Task Group.

Recommendations:

1. Members of Resources O&S Panel are asked to note and comment on the outcome of the pilot.

2. That due to the agreement not to make use of MyCMIS the Panel agree changes to recommendation 2 of the Task Group to:

   > Should the pilot be successful then the use of tablets should be rolled out to all Members and Officers who indicate that they wish to move to paperless working. Consideration needs to be given to training and support. These Members and Officers should no longer be provided with paper Committee reports.

Tracking

Executive:	
Overview and Scrutiny:	
Council:	

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Appendices   **1. Outcome of pilot and update on recommendations**
attached to report:

Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers:

• OS 35/12 Saving Paper Task and Finish Group – ROSP 6th December 2012

1. Summary

1.1. In September 2013 Members of Resources O&S Panel requested that a Task Group be set up to look further into saving paper within the democratic process. The Task Group reported back to the Panel on 6th December with their findings made several recommendations, including a recommendation to undertake a pilot of using Tablet technology in Committee meetings. This report updates the Panel of the outcome of the pilot and the progression of the other recommendations made by the Task Group.

1.2. For information CMIS is the City Council's e-Democracy Committee Management System which is where all aspects of the Authorities committees, forums and working groups; including meeting dates, agendas, reports , minutes, memberships and substitutes are held. MyCMIS is a web portal that provides customised access for each Member to keep track of their meetings, documents and schedule. Member's are provided with access to their meeting documents and information, which they can simply annotate electronically and save to their device prior to a meeting.

2. Background

2.1. In September 2013 Members of Resources O&S Panel requested that a Task Group be set up to look further into saving paper within the democratic process. The Task Group reported back to the Panel on 4th December with their findings and the following recommendations.

1. That the Council should move towards moving to using technology in order to save paper, printing and postage of Committee Papers. Initially a pilot should be undertaken with volunteers who own or who have access to a tablet. As this pilot should concentrate on issues around accessing, reading and annotating reports before and within Council meetings it may be possible to undertake the pilot without the initial purchase of MyCMIS.

2. Should the pilot be successful then MyCMIS should be purchased and rolled out to all Members and Officers who indicate that they wish to move to paperless working. These Members and Officers should no longer be provided with paper Committee reports.

3. A mechanism whereby Members can purchase a suitable device via payments from their allowance should be explored if Members indicate that they wish to have their own tablet. Consideration needs to be given to how this is rolled out to Officers.

4. That regardless of the move to paperless Committees, consideration should be given to the amount of minute books produced by the Authority. The Task Group recommends that a small number be made available in

each group office and not routinely produced for all Members of the Council.

2.2 This report updates Members of Resources O&S Panel on the outcome of the pilot (Recommendation 1 & 2).

2.3 Work is continuing on Recommendation 4 in the Governance Directorate. The reduction in minute books identifies a saving of approximately £2500 per annum. To achieve the savings it will be necessary to establish a practicable and workable methodology to support Members in full Council meetings.

3. **Pilot**

3.1. A request for volunteers, who owned or had access to a tablet device, to be involved in the pilot was emailed to all Members on 4th December 2013. Interest was shown by Cllrs Allinson, Atkinson, Bloxham, M Bowman, Bowditch, Cape, Craig, J Mallinson, Tickner and Sherriff. The meetings which the Members participated in during the pilot can be seen in the table at Appendix 1.

3.2. The Committee Clerks tested an Android tablet.

3.3. The 10 Members who volunteered covered the majority of Committees within the timeframe of the pilot. The knowledge and experience of working on tablets covered a range from Members who had used a device for 2-3 years to those who used one for the first time during the pilot.

3.4. Following negotiations with Astech, the providers of MyCMIS software, an agreement was made for the installation of MyCMIS for the pilot with a proviso that should the pilot be unsuccessful then the cost of the licenses fees would be fully refundable.

3.5. The software was installed on 18th January 2013 and access was provided to all Members on the pilot. Prior to installation Members were requested to look at the different PDF reader apps that were available as this was purely a personal choice. Once documents are downloaded onto the device Members would access and annotate reports via the PDF reader.

3.6. The Scrutiny Officer looked at various PDF readers including Adobe, DocsASLite, Good Reader and GoodNotes and informed Members that her preferred App was the Good Reader, particularly for annotating the reports – although this was the only App that was paid for (£2.99). Throughout the pilot this particular App has proved successful and invaluable for those using iPads.

3.7. Formal training was deliberately not provided for the pilot, primarily as Astech had said that this is not required and a video would be available for self learning. Unfortunately the video was not made available until after the pilot had begun. A handout with pictorial instructions for accessing MyCMIS was produced by the Scrutiny Officer and circulated to participants. In addition time

was set aside for Members to "drop in" and have a one-to-one with the Scrutiny Officer in order to be shown the basics. 8 of the 10 participants took up this offer of additional support.

3.8.   Members were also invited able to contact the Scrutiny Officer on an ad hoc basis to discuss issues or request ongoing help.

3.9.   An issue that was identified very early in the pilot was that there was a requirement to download individually each report/document for a Committee meeting. The process was time consuming and cumbersome. Following discussions with Astech it was identified that an *Agenda Document Pack* would need to be produced using the CMIS Agenda Builder. This would collate all papers required for the Committee into one large document. Each document was "bookmarked" which eased the use of moving from one report to another quickly.

3.10. The Committee Clerks worked hard in developing the Document Pack and this was rolled out starting with the agenda for the Regulatory Panel on 6th February 2013 and Members who were on the pilot no longer received paper copies of Committee reports for there on in.

3.11. The Lead Member (Cllr Craig) arranged for a meeting of the pilot Members on 21st March 2013 to discuss and evaluate the pilot.

4.   Feedback from Members

Training & Support

4.1.   Members agreed that the support provided was adequate and appropriate but questioned whether formal training could be provided to Members who would be new to using a tablet. "Suck it and see" was cited by a Member as the best approach with ad hoc support available if and when required. Some Members were concerned about the extra burden on staff time, but were assured that this had been taken into consideration prior to the pilot.

4.2.   Members agreed that the informal get together to talk about their experience towards the end of the pilot had been extremely useful in sharing tips and experiences and receiving help and support from their peers. It was suggested that should the pilot be rolled out the regular drop-in sessions are introduced, perhaps initially on a monthly basis.

4.3.   It was evident that the device needed to be used frequently in order to gain and maintain skills. Members who were able to put more time in found that they got more out of the pilot and were more confident in using the tablet in Committees.

Problems Encountered

4.4. The group did not identify any insurmountable issues and a commentary of issues raised is detailed below along with action taken.

4.5. **Cannot annotate text on scanned documents**. This was an issue particularly for those Members on Development Control as the schedule is produced by scanning all of the various reports, plans and letters to produce one document pack. Committee Services are to investigate whether the pack can be produced in an alternative manner which would enable annotation of text and bookmarking of each application.

4.6. **One Member could not transfer reports to a PDF reader from the internet**. It was discovered that this was due to having a 1st Generation iPad which did not support this feature. It was agreed that this Member would receive report packs via email rather than receiving a webpage link.

4.7. **Page numbers at times did not correspond to the page numbers of those with paper copies**. This made it difficult to navigate around the report during Committee. Members were informed that from the 2013/14 Civic year commencing in May 2013, deadline dates for reports to Committee Services had been changed in order to create document packs earlier. This would ensure that there is no differentiation between the paper report and the electronic reports.

4.8. **At times the document packs did not contain all of the reports**. It was identified that this was due to a report being marked "to follow". The document pack would be updated when the report was available however the onus is on the Member to read and action emails which would notify them of any changes.

4.9. **Cannot access Committees which they do not sit on through MyCMIS**. This was a major issue to one or two Members on the pilot. It was expected that during the time of the pilot that we would receive an update to MyCMIS which would include RSS Feeds which would inform Members of the availability of Committees which they did not sit on but expressed an interest in. Unfortunately this did not happen during the time of the pilot and Members did rightly question the requirement for MyCMIS when they were able to access all reports via CMIS.

4.10. **Documents were not downloaded with their name tag.** This was a sporadic issue but did cause an issue to Members as downloaded reports often had the name "document" "document1" etc. rather than the name and date of the Committee. This is to be followed up with our software providers.

4.11. **Cannot access wi-fi in the Committee room**. Members were reminded that it was not expected that they access reports either via MyCMIS or CMIS during the Committee. It is expected that these will be downloaded to their device prior to the meeting. However the Authority is currently formulating a project plan to install wi-fi throughout the Civic Centre which should alleviate this problem in the future (see 4.13 below).

4.12. **Security of data**. Members were reminded that they are required to password protect their device and security of data was of paramount importance. Although the majority of Council reports are public, Members will have access and will download private reports and consideration should be given to protecting private documents within their chosen PDF reader.

Potential improvements

Wi-fi

4.13. Members were informed that a project to have wi-fi throughout the Civic Centre was currently being developed and it was hoped that there would be access on all floors later in the year. Members welcomed this development and although most downloaded reports to their device prior to the Committee, there would possible be times when internet access would be required and therefore a reliable connection was essential to the success of any roll-out of paperless working.

Use of Projector

4.14. Members questioned whether a tablet could be connected to the smartboards and/or projectors which are available in some Committee Rooms and the Council Chamber. It was agreed that there would be times where use of the projector would enhance a meeting and assist those working on tablets. ICT staff agreed that they would undertake some research on this.

4.15. Several Members identified that they were using their device to store and retrieve a variety of other documents, information and reports for other bodies which they were involved. Although the evaluation centered on the use of tablets with the Committee arena it was evident that Members were adapting and widening their use and agreed that the devices were extremely versatile to their different roles.

5. Conclusion

5.1. The aim of the pilot was to establish whether Members could access, read and annotate reports before and within Council meetings and feel confident enough to attend meetings without traditional paper copies of reports. Members on the pilot agree that this has been successful.

5.2. As detailed earlier in the report the knowledge and experience of working on tablets covered a range from complete novice to extremely proficient. Support to each Member has varied and the onus is on Members to use the tablet regularly in order to develop their skills and confidence.

5.3. Members agree that MyCMIS has some advantages, they liked the personalisation which identified their Committees and therefore access to reports was quick and easy. Issues were raised that it was difficult to identify other Committees via MyCMIS and the promised RSS Feeds were not forthcoming from the software providers. Members welcomed the creation of the Agenda Pack for each meeting has enabled easy downloading via CMIS. Members discussed the costs associated with MyCMIS (ie licenses and service support costs - attached at Appendix 2).

5.4. In taking all of the above into account Members on the pilot considered that the use of tablets in Committees should be rolled out using the functionality on CMIS alone and not via MyCMIS. Members stressed that the choice of the PDF reader was more vital to the usability as this is where documents are

stored, viewed and annotated. MyCMIS, or indeed CMIS should only need to be accessed to download document packs prior to Committees.

5.5. The amended savings calculated on an average of £213.64 per Member per annum [1] are as follows:

Number of users	MyCMIS Cost per Member Year 2 onwards	MyCMIS Total Saving Year 2 onwards	Savings by using CMIS*
9	255.55	377.19	(1,922.76)
20	125.00	(1,772.80)	(4,272.80)
35	92.14	(4,252.50)	(7,477.40)
40	90.00	(4,945.60)	(8,544.00)
50	90.00	(6,182.00)	(10,682.00)
60	90.00	(7,418.40)	(12,818.40)
70	90.00	(8,654.80)	(14,954.80)

5.6. However by opting to use CMIS Members who choose to become paperless will need to ensure that they regularly access, and more importantly, act upon emails as they will be notified when Document Packs are available by email by Committee Services staff.

6. **Recommendations**

6.1. Members of Resources O&S Panel are asked to note and comment on the outcome of the pilot.

6.2. That due to the agreement not to make use of MyCMIS the Panel agree changes to recommendation 2 of the Task Group to:

Should the pilot be successful then the use of tablets should be rolled out to all Members and Officers who indicate that they wish to move to paperless working. Consideration needs to be given to training and support. These Members and Officers should no longer be provided with paper Committee reports.

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[1] *Calculation based on average cost £213.64 per annum per Member as calculated by Task Group – Task Group Report Resources O&S Panel 6th December 2013 OS 25/12*

Appendix 1 Details of Committees

Date	Meeting	Cllr J Mallinson	Cllr S Bowditch	Cllr B Craig	Cllr R Bloxham	Cllr L Sherriff	Cllr T Allison	Cllr L Ticker	Cllr D Cape	Cllr K Atkinson	Cllr M Bowman
25/01/13	Development Control			■	■	Sub			■		
30/01/13	Executive Briefing/JMT							■			
01/02/13	Scrutiny Chairs Group										
05/02/13	Special Council	■	■	■	■	■	■	■	■	■	■
06/02/13	Regulatory Panel						■		■	sub	
11/02/13	Executive/JMT							■			
14/02/12	Community O&S					■	sub				
21/02/13	Resources O&S		■	■							
27/02/13	Executive/JMT							■			
28/03/13	E&E O&S		■							sub	
05/03/13	Council	■	■	■	■	■	■	■	■	■	■
06/03/13	DC Site Visit			■							
06/03/13	Carlisle Educational Charity										
08/03/13	Development Control			■	■				■		
11/03/13	Executive /JMT							■			
13/03/13	Regulatory Panel			■		Sub	■		■	sub	
22/03/13	Executive Briefing/JMT							■			
28/03/13	Community O&S					■					

Appendix 2   MyCMIS Costs

Number of users	Support Costs per annum	License Cost per user	Installation Cost	Total Cost Year 1	Total Cost Year 2 onwards	Cost per Member Year 1	Cost per Member Year 2 onwards
9	500	200	2000	4300	2300	477.77	255.55
20	500	100	2000	4500	2500	225.00	125.00
35	600	75	2000	5225	3225	149.28	92.14
40	600	75	2000	5600	3600	140.00	90.00
50	750	75	2000	6500	4500	130.00	90.00
60	900	75	2000	7400	5400	123.33	90.00
70	1050	75	2000	8300	6300	118.57	90.00

Number of users	Cost per Member Year 1	Cost per Member Year 2 onwards	Saving per Member year 1	Saving per Member year 2 onwards	Total Saving Year 2 onwards	Savings by using CMIS*
9	477.77	255.55	264.13	41.91	377.19	(1,922.76)
20	225.00	125.00	11.36	(88.64)	(1,772.80)	(4,272.80)
35	149.28	92.14	(64.36)	(121.50)	(4,252.50)	(7,477.40)
40	140.00	90.00	(73.64)	(123.64)	(4,945.60)	(8,544.00)
50	130.00	90.00	(83.64)	(123.64)	(6,182.00)	(10,682.00)
60	123.33	90.00	(90.31)	(123.64)	(7,418.40)	(12,818.40)
70	118.57	90.00	(95.07)	(123.64)	(8,654.80)	(14,954.80)

- *Calculation based on average cost £213.64 per annum per Member (report OS 25/12)*