

Going electronic

Electronic papers are becoming the norm

Many local authorities are moving to electronic papers using tablets, sometimes with key aspects of the paper projected on to a big screen in meetings. Rather than sending out and considering papers in hard copy.

This has many benefits: it is easier and more efficient to compile papers into meeting agendas; and it makes distribution much easier. Councillors (and others) can access and read their papers wherever they are, so working outside of the office becomes easier.

There are a wide range of different systems on the market to help compile and distribute meeting papers. These have different levels of functionality.

To start with, early systems just turned papers into PDFs or similar, so they looked very much like physical papers, but in electronic form.

Now, we are seeing organisations taking advantage of the functionality of the electronic form. Purely electronic papers are being created, designed to be used only in electronic format. These incorporate more advanced features such as annotation to allow Councillors to write notes on papers (e.g. iAnnotate or similar); search functions to allow access to previous information on a topic; chat functions to allow discussion on the papers ahead of the meeting; and hyperlinks allowing more in-depth information to be easily accessed e.g.:

- Maps, though Google maps or similar
- Links to consultation papers/summaries of submissions and other background papers
- Previous decisions, through the Council register of resolutions
- Financial or data analysis
- Appendices to the paper.

Hyperlinks allow a “pack” of information to be easily navigable.

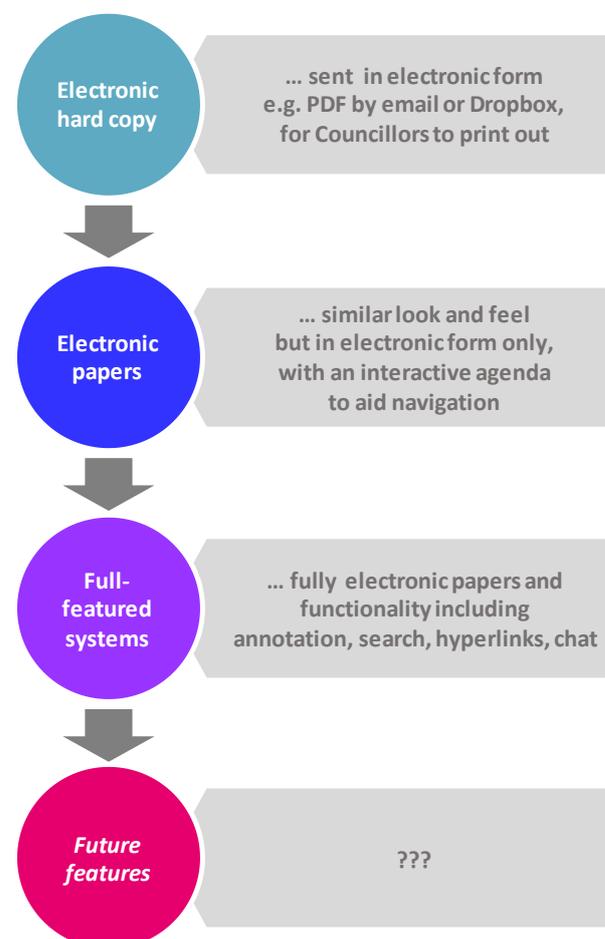
Still in a transition phase from paper to electronic

Of course, not everyone uses these types of systems yet, even when they are available. Some still prefer to print out papers to read and comment on them in hard copy.

We’d expect that to change further as users become more comfortable with electronic presentation and systems, and as system functionality improves further.

These days many papers might still have the look and feel of a hard copy albeit in electronic form. But this is changing.

Figure 1 Evolution of electronic papers



Source: NZIER

The use of the advanced features of these systems should escalate as more digital natives move into governance positions.

In the interim, you will need to understand your Councillors' preferences for electronic presentation versus paper and take that into account in your templates, and for the general way you present papers.

Most of the new electronic governance paper systems come with on-line tutorials and other support – make use of these to get up to speed.

The 'look and feel' of an electronic paper is quite different

Most of the modern electronic systems are tablet based. These tend to work better if the papers are designed in a format specifically intended to be easily readable via a tablet. Tablets tend to be used in landscape profile, and the display designed so the viewer can only see one page at a time. Of course, what can be seen depends on the size of the tablet – as well as the original iPad dimensions, they now range from a full A4 size down to the smaller iPad mini.

Standard tablets don't all show a full A4 page (unless zoomed down, in which case the typeface can become too small to be readable). A3s particularly can be difficult to fit into tablet format!

Some agencies have been redeveloping their paper templates to make them easier to use in tablet-based systems.

One example is the Cabinet Office, which has issued revised guidelines on formatting papers for CabNet.¹ These are more focused on making standard papers electronic (so are only at the second phase of the evolution as shown in Figure 1 above). But are still worth a read if you are at this stage of the evolutionary process!

We expect that purely electronic papers and electronic meetings will become the norm. Therefore, the pressure for change to more digitally apt formats and to have better designed templates will increase. The features within electronic paper systems will also improve, allowing for a full digital experience (rather than just a digitisation of physical papers).

Making electronic papers readable

All the general principles for producing papers that are a quick read for busy decision-makers still apply in the digital case.

But extra ideas come into play. Here are suggestions for ensuring electronic papers are easy to read:

- **Review your work in the electronic form** in which it is to be read. That way you will be editing it in the shape the readers will see.
- **Consider moving to landscape orientated papers** – standard tablets are generally used in landscape, so orientating your paper this way will allow a whole page of the paper to be displayed on the screen. It will probably involve re-designing your templates.
- **Use colour** – often colour hasn't been used because of the additional costs of copying. But that isn't an issue for electronic papers. Colour is not only useful in graphs and diagrams, it can be used to highlight headings and particular text e.g. quotes.
- **Simplify diagrams** – make sure they are crisp enough for the key features to jump out, without spreading over more than one screen page (and bear in mind some users prefer the 'mini' tablets with smaller screens).
- **Scale to the new situation** – check the size of type-faces you are using. Are they large enough to be easily readable on a screen?
- **Ensure tables fit on one page if possible**, and if not, repeat the heading structure on the new page(s) so that they are easy to follow.
- **Consider using two columns for displaying graphs and charts** – a single chart often doesn't look so great stretched across the page.
- **Avoid splitting paragraphs and bullet point lists over a page break**. This can be solved by a greater use of white space. Or perhaps even careful redrafting.

¹ CabNet is a secure platform for supporting Cabinet and Cabinet committee processes. The guidelines can be found at <https://cabguide.cabinetoffice.govt.nz/document-display-cabnet>.

Re-work electronic A3s – traditional A3s don't work so well as they can't be seen in their glory on a (smaller scale) screen. You will have to tailor them – think larger type-faces; less dense content; and relatively larger tables, charts and diagrams. Or consider a series of inter-related diagrams that you can click on and link to more detailed diagrams or information about particular items within the main diagram/A3).

- **Use other innovative design tricks** e.g. pull out boxes for worked examples, case studies, and key pieces of data etc. Councillors are used to such design elements as they are standard on well-designed web pages. These can be built into electronic papers for 'hit the eye' effects.
- **Use hyperlinks** – to background information, link to appendices, bring up previous papers, etc. This enhances the functionality and self-contained nature of electronic papers.
- **Include a search function in the template** – this will allow the reader to easily find sections of the paper while reading it, or when referring to it in a meeting. And couple this with even closer attention to subheadings, which should be topic specific and comprehensively cover the material.
- **Include plenty of white space for comments/notes** – programmes which allow for handwritten comments on electronic documents can still be pretty clumsy.

Security considerations are important

Make sure you pay attention to security issues. It's much easier and riskier to accidentally distribute an electronic copy to many unauthorised readers (as some have found) than it is to leave a paper copy lying around. (And moreover, it's easy to flick it on to a distribution list, or put up on the web.)

You'll still also need to follow any standard security rules, and rules about whether papers are on the public excluded agenda or otherwise.

All of the systems noted above have their own particular security features and policies which you'll need to get familiar with.

If in doubt, innovate...

This is a developing area. No doubt software will continue to improve, and electronic papers will become much more of the norm. This will raise expectations.

But in the interim, we'd encourage you to try some different templates, and presentational styles. Try adding hyper-links rather than references. Flair is usually appreciated – even when it's not totally successful.

But don't forget to always follow up by checking with your Mayor and Councillors (and other decision-makers) to see what works best for them.

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