A LEAP INTO THE DIGITAL AGE

Idaho Housing and Finance Association used simple, off-the-shelf, technology to fix an expensive, inefficient and environmentally unsound process. Not only did we "go green" by using tablet computers instead of printed material for our board meetings, we saved thousands of dollars and valuable staff time. The result? We're able to focus more on our core mission — improving lives and strengthening Idaho communities — and less on administrative tasks.

Background

Idaho Housing and Finance Association board members meet at our headquarters about ten times a year. Considerable staff preparation is undertaken to ensure the meetings and board packets are properly prepared for our board members. A week before the board meeting, packets are assembled, printed, and mailed to provide each board member with adequate time to review the packet and make appropriate notes for the upcoming meeting. On the day of the meeting final versions of the packet are available in leather binders with colored pages that reflect changes from the advance copy. The board packets are typically between 50 and 100 pages with full-color graphs and charts. Our mailroom personnel print and ship the packets. Yearly packet preparation cost is about $14,000.

Yearly Board Packet Preparation Costs
- Contracted Copy Center Personnel Costs - $800
- Printing Costs – $400
- Shipping Costs - $200
- Meeting Total - $1,400
- Yearly Total - $14,000

Our board chairman (along with the executive director) spearheaded the goal of reducing the paper and mailing costs of the board packets.   In addition, half of our board members were already using Apple iPads for personal use and they were bringing them to board meetings. The obvious choice was to go digital.

As such, the executive director and board chairman mandated that all board packets be in digital form and not printed or mailed to board members. The board members receive the digital packet either through an email attachment or website. The board members use their iPads to make notes within the digitized board packets.

The Digital Board Packet

Digital documents on the iPad work well in the Adobe Acrobat PDF format. Since the board packets are created in Microsoft Word, Excel, and PowerPoint, it is easy to save them as one large Adobe Acrobat PDF file. Documents can be saved as PDFs from Microsoft applications and we wanted to add more sophisticated bookmarks and navigation aids in the PDF files; to accomplish this we used Adobe Acrobat Professional to augment the PDF creation.

Wireless Board Room

Our IT department needed to provide wireless Internet access in the boardroom. This was easy since our headquarters was already configured with wireless Internet access. However, the IT department found that when the boardroom was filled with many mobile devices, Internet connectivity dropped because of all the interference generated from the electronic devices. The IT

department solved this problem by putting a dedicated Internet wireless access device directly in the boardroom.

The Board Website Portal
To distribute the packets to board members, we needed a way to publish the documents so they could be downloaded to each member exclusively. We created a website for the board members to access their packets and related documents. Password and security were added with an easy to use format.   The website was created in Microsoft FrontPage by the IT department.

The Apple iPad
For those who did not own iPads (about half), we purchased them. The iPad 2 was chosen because of its enhanced built-in operating system security. Apple devices use hardware encryption and all applications (i.e., apps) are approved by Apple before being published to the Apple store. Any app that does not meet Apple's security requirements does not get offered for purchase.   The Apple iPad was a good choice because of its ease of use. Most of our board members are retirees and aren't used to technology in the workplace, so having an easy system was imperative.

Finding the Right App
The Apple iPad comes with numerous built-in apps, thus reducing the need to purchase software. Apps for mail, contacts, calendar, notes, Internet, and many others are built in to the device operating system. The free built-in apps called iBooks was good but did not meet all of our requirements for the board members. We needed an app that was very simple to use but met our requirements to read PDFs, annotate text, and add notes.   However, finding the right app was a bit tricky so we tested a number of PDF reader apps. We settled on Readdledocs. Readdledocs seemed to have the simplest interface compared to all the apps we tested. The Readdledocs application costs only $4.99.

Wireless Presentations
Prior to this project, all board presentations were conducted on laptops using Microsoft PowerPoint wired into a LCD projector. A clicker was used by the presenter. We decided to run all presentations on the iPad instead of a laptop. The iPad does not have a clicker, but uses something much easier: your finger. You use your finger to swipe through pages of a presentation. To remotely display the iPad, we purchased an Apple TV device that allows any iPad 2 to wirelessly project its screen. The Apple TV is a tiny device directly connected to the boardroom projector, thus eliminating any wires. IPads have a built-in feature called 'airplay' that uses the Apple TV to project its screen for presentations. The Apple TV costs $99.

Go-Live
Once all board members had their iPads, we scheduled a training session at the next scheduled meeting. During this session, we demonstrated the use of the iPad and the Readdledocs app. To our surprise, the interactive class took only 45 minutes to show the features of the iPad. The board members were taught how to download the packet from their email or web portal and make notes. In case any board member had difficulty downloading the packet, it was also published on the website to be read online or downloaded as needed. After the session, the board members were easily navigating though their packets with little assistance. A few handouts were provided to assist the board members with Readledocs, connecting to the wireless, and using the portal website.

For the next meeting, we produced an "easy access" card to help board members connect their iPads to the corporate wireless. We encouraged the board members to arrive a little early to connect their iPads, read their email, and get through all their personal business before the meeting started.

Challenges
We were initially concerned that the iPad devices may be a distraction during the meeting. Since the iPad is consumer device, the challenge of using it for business productivity was a big unknown. For the most part, the board members were not distracted during the meeting with email and Internet on their iPad. They have used this device in the manner we planned.

Most of the board members adapted to the new technology so well that prior to the board meeting they would share all their newly discovered apps with other members. Their proficiency using the iPad was remarkable. At first, some board members had difficulty using the device, but over time quickly became proficient. Only one board member could not get accustomed to going paperless and opted to continue with paper copies of the board packet.

For the board members without their own iPads, the most challenging aspect of this project was setting up a new device. Our first two iPads came with version 4 of the operating system. Until version 5 was released, version 4 required a computer with Apple iTunes to be set up in order to configure an iPad. This was challenging because two board members had to bring their personal laptops to our office so we could set up their iPad for them. Once version 5 was released, the iPad could be set up without our involvement.

Savings
We purchased iPads for each board member who did not have access to a tablet at a cost of around $500 each. This capital expense was considered an honorarium for the board members and we let them know that they were responsible for any gift tax considerations. To complete this project, only six iPads were purchased at a cost to our organization of $3,000. We received a return on our investment to less than three months, not to mention the time saved on preparation.

Summary
Our executive director uses his iPad to project and present the agenda and board packet to the screen. The board members follow along with their iPads and respond with questions and comments. During the last board meeting, some department managers made presentations to the board on the iPad. We used the Apple TV device along with the airplay function to switch control from the executive director to the managers and back as needed. The presentations went well and very smoothly.

This project was quite remarkable due to how quickly the board members adapted to this new technology. The board members are proud of being on the cutting edge of technology and going "green" for their board operations. They see themselves as not only using technology, but driving the technology change for productivity in HFAs.   We believe this is a replicable model for HFAs to move the boardroom operations from a paper production system to the digital age.

Our Boardroom

We can walk around the room displaying the iPad screen on the projector

Our board portal website
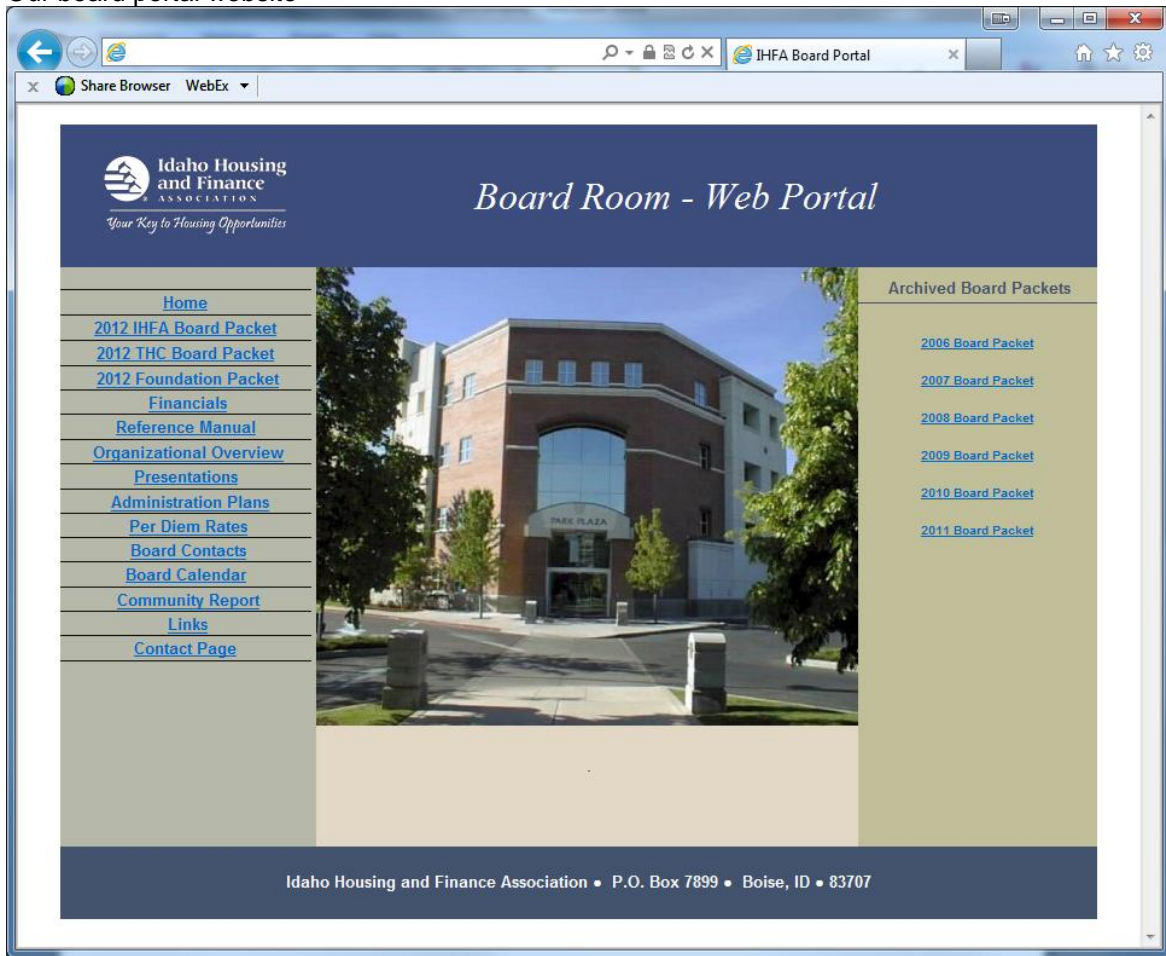
Apple TV device for iPad screen projection

iPad screen with Readdledoc app for board members