




Yolo County Housing

Lisa A. Baker, Executive Director

147 W. Main Street
WOODLAND, CA 95695

Woodland: (530) 662-5428
Sacramento: (916) 444-8982
TTY: (800) 545-1833, ext. 626

DATE: May 17, 2012
TO: YCH Board of Commissioners
FROM: Lisa A. Baker, Executive Director 
PREPARED BY: Alberto Castillo, IT Manager
SUBJECT: **DISCUSS THE FEASIBILITY OF PORTABLE ELECTRONIC DEVICES FOR PAPERLESS BOARD MEETINGS, REVIEW ALTERNATIVES AND SELECT PREFERRED OPTION**

RECOMMENDED ACTIONS

That the Board of Commissioners:

1. Review and discuss the findings of the research;
2. Compare alternatives and select preferred option; and
3. Authorize the Executive Director to implement.

BACKGROUND / DISCUSSION

At the April 19, 2012 Board meeting, YCH Agency Clerk gave an overview of YCH's transition to electronic board packet preparation and access. As a result of that presentation, Board Chairwoman Thomson asked to agendize a discussion about access and purchase of electronic reading devices and alternatives for Board members and management staff.

Historically, agendas, packets and minutes have been on paper with public posting being done in public physical spaces. While YCH must still post agendas in a location that is freely accessible to members of the public, the recent explosion of Internet-based applications allows a broader and deeper opportunity for public visibility and engagement. As a spin off, broader use of electronic media also allows YCH the opportunity to shorten the supply chain and reduce the need for paper copies of the agenda packet. This in turn saves copy costs, staff time and paper. It is estimated that **the change from paper-based board packets to electronic packets will save approximately \$3,785 dollars in staff time, copy charges and paper per year, based on an average of 11 board meetings per year.**

In preparing this report, staff has looked at the pros and cons of electronic reading devices, the availability and type of devices and ways in which YCH could facilitate making the transition to use of devices in lieu of providing paper board packets to Board members. For the purposes of this report they will be referred to as "Tablets" and "E-Readers".

As the Board is aware, YCH has been actively involved in pursuing cost savings throughout its portfolio and daily operations. This ongoing commitment has allowed YCH to save time, material and energy, which equates to ongoing cost savings. To date, that has included the transition to cloud-based data storage and back-up systems, cloud-based payroll systems and improved access and implementation of document scanning. Phase II is now in the implementation stage and includes Interactive Voice Response (IVR) for applicants and residents, along with the transition to paperless files and board packets.

While there has, at times, been a history of controversy in different communities regarding public agencies purchasing tablets for use by staff and board members, that controversy seems to be centered around the perception that tablets are being “given” to members and are, therefore, a gift of public funds. To ensure that this would not be the case at YCH, it is important to create a system that serves the Agency and removes the potential risk that devices would be used inappropriately.

Tablets should be considered a viable option for the viewing of documents and correspondence and tablets are already in use at YCH for inspections. Tablets have many current and future applications that will improve YCH business functions, including improved mobile access in the field. Indeed, at this time, it would appear that tablets may even become the eventual successor to desktop computers. Finally, as the market has continued to mature, the cost of tablets and e-readers has come down significantly. The proliferation of apps and useable data products now ensures that tablets are valid tools for agency productivity.

Options for making the transition to Paperless

There are a variety options and hybrids available. Those options include:

1. Continue with **paper agenda**;
2. Use of **personal laptop or other device** to access information;
3. **Provide e-readers, such as Kindle** that allow limited documentation and limited business use functionality;
4. **Purchase of a standard Tablet** for use by authorized YCH Board Members and staff (YCH issued and owned);
5. Purchase of **one’s own electronic device** using YCH pooled purchase supplier or private purchase when less expensive (with or without one time allowance);
6. A **combination of options above** (such as having the option to either buy one’s own that meets a standard specification or having YCH purchase a tablet that meets the standard specification)

Staff considered each of these options in preparing this report. After research, staff is recommending that options 1 and 3 are not viable long-term strategies and recommend that the Board focus on options 2 and 6 as preferred alternatives, with **option 6 being the staff’s preferred recommendation**. While option 4 is a viable strategy, it would be potentially costly to the Agency as well as require additional monitoring over a large number of devices to assure that the equipment was only used for YCH business purposes. In addition, YCH has been moving to a platform, such as with mobile phones and with vehicles, that allow for greater flexibility through staff providing their own equipment while

receiving some allowance that recognizes their use for YCH business purposes. This is mutually beneficial – YCH can control costs and use of agency equipment for agency purposes, while the employee selects a custom option that works for them and can carry only one device with multiple purposes. This is especially feasible due to YCH's move to cloud-based computing systems that allow YCH business software to reside in the Cloud and not on the device. In addition, this is one of the fastest growing business models as both employees and companies realize mutual benefits.

Overview and Discussion of Options

With regard to options 1, 3, and 4, staff does not recommend these as preferred options for the following reasons:

- Continuing with paper agenda packets is not feasible due to staff and paper costs, as well as the transition to an electronic system – this would increase, not decrease, the amount of work necessary in order to maintain two (2) systems;
- E-Readers, while cheaper and can allow access to the PDF files and some ability for annotation, if YCH were to purchase the property, it would have no business use and would not be useful in the long term. This would not necessarily preclude a Board member from purchasing an e-reader under option 5 or 6 if s/he so desired. The difference being that the device would be useful to the owner, who in this case, would not be YCH.
- Option 4 is discussed in the section above. Due to cost and potential device proliferation, as well as the difficulty in monitoring compliance with YCH Internet Access policies for a large number of users, this option is not recommended.
- While Options 5 is consistent with YCH business needs and practices; nevertheless, it could be cost prohibitive for some members and, therefore, is not a recommended option.
- Options 2 and 6 are certainly feasible. However, **staff recommends Option 6 as it allows the most flexibility**. Members and staff who currently have devices would be able to use those devices for reading Board packets as outlined in Option 2. But it would also allow members and staff to purchase privately and to take advantage of pooled purchase savings if they wish to purchase their own, or to have YCH purchase one for YCH business uses and make available on a “check out” or assignment basis where a member does not wish to purchase one or where individual purchase is not feasible.
 - Should YCH provide a tablet it would be maintained as the property of the Agency and would be returned to YCH at conclusion of service. Maintenance, repairs, and replacement would be covered by YCH. As a YCH device, private use of the device would be severely limited by YCH IT policy and, in accordance with our adopted IT policy, there is no expectation of privacy in relation to content on the tablet. In addition, the tablet would be

subject to regular review to ensure that content adheres to YCH requirements. Elected and appointed officials, as well as staff, would need to adhere to the IT policy, Fair Political Practices and federal law in keeping political activities separate and could not engage in those activities on a YCH-owned device.

- Should a user elect to use an existing personally-owned device, a device provided by another entity, or to purchase his/her own device, YCH IT policy would not generally apply except in those circumstances where the user is on YCH property, engaged in YCH business or in a YCH Board meeting. Responsibility for repair and replacement would fall on the user. Discounts available to YCH for the purchase of these devices could be extended to the user, as well as an allowance to facilitate purchase and to cover the public use.

Survey Results

A brief survey of Yolo reveals that there are several local agencies currently using tablets:

- The County of Yolo, the Board of Supervisors and select staff uses IPADs to review board packets, minutes and email, while one member has chosen to use his privately owned laptop.
- The City of West Sacramento has gone to paperless packets for two of its board members. The City purchased tablets for some members, but one member uses his own.
- The City of Davis has a voluntary paperless packet and all members are encouraged to use the paperless packet, but only two members use them. They do not provide tablets, but they do provide laptops.
- The City of Woodland has not issued tablets or moved to paperless packets at this time.

Operating Systems: Android vs. IOS

Where a user supplies his or her own tablet in order to read packets, the operating system is not as important as it is where YCH purchases the tablet, or when the tablet would be used in conjunction with YCH business software. The two (2) major operating systems for tablets are Android (open source Google-based) or IOS (Apple proprietary). Android-based systems are most compatible with YCH business software since it integrates easily with Google and Microsoft.

With regard to subscription service for 3G and/or 4G, YCH would not generally pay for subscription service as YCH provides free wireless access in six locations and there is free wireless access in the Board chambers. YCH reserves the right to provide 3G and or 4G access for regular business purposes. This does not preclude a user from establishing his or

her own 3G/4G service on a device. In the case of YCH-owned devices, this would be with YCH permission and in accordance with the IT and Internet usage policy.

Recommended Required Specifications

Much research has been done to determine models and types most suited for YCH use. There are over one hundred models on the market with varying features. The manufacturers range from the well-known to the obscure. In order to get the most business use, YCH staff has determined that the following features should be included in any chosen model:

1. Screen size should be over seven inches to allow for comfortable reading
2. Wi-Fi capability is needed to connect and download files
3. Option for 3G and/or 4G if needed in the future
4. Battery life should extend over four hours
5. Ability to read PDF files
6. Ability to use Remote Desktop Services if it is a YCH device or if it would be used in a YCH business capacity (i.e. by management staff)
7. Scalability with ability to add storage and/or memory as needed

Purchase Options

YCH has the ability to participate in government pooled purchasing plans. The most common one used is the California Multiple Award Schedule (CMAS) which is a list of pre-approved contracts vetted and adopted by the state of California. This program offers discounted services and products to all levels of government in the state. In addition, the program provides for private purchase of the tablet using an employee discount program. Using YCH pooled purchase means that prices would range from approximately \$300 to \$600 per device, excluding maintenance and insurance and not including 3G or 4G subscription. With regard to selected standard for YCH-purchased hardware, at this time staff recommends the Samsung Galaxy 10.1 and later, probably in second generation, the Samsung Galaxy 10.1 Tab 2 based on the rating factors above, ease of use, reliability and price.

With regard to Option 6, YCH staff, in looking at average prices and at the need to balance public purpose with needed flexibility, recommends approval of an allowance of \$100 for individuals who choose to purchase his/her own device. The allowance could be paid at time of purchase of a compatible tablet device. Such allowance would be available once every three (3) years to support the need to replace outmoded technology.

Required Conformance with YCH IT Policies

As stated above, users would need to adhere to YCH IT and Internet usage policy if it is a YCH device or when the device is on YCH property, being used for YCH business or in YCH business and Board meetings.

Separate from this, staff will be bringing back to the Board an update to the current policy in the next two months. The YCH IT and Internet Policy is now two (2) years old; meanwhile technologies have changed significantly during this time. Changing technologies mean that YCH especially needs to place attention on new security requirements.

Training and Use

Whether or not YCH purchases the tablet, staff recognizes that any new process or technology has a learning curve. To help mitigate that, staff proposes to make IT services available on request to help set up an individual tablet and train staff and members on how to access board packets and functions.

FISCAL IMPACT

The impact will be determined by the model chosen and the course of action taken to provide tablets or require a private purchase of tablets. Purchase of Tablets without 3G/4G, with 32 GB of memory for 7 board members and 9 management staff would run a little over \$10,000, which would be fairly cost prohibitive for the Agency and would take almost three (3) years to recoup cost. Implementation of Option 6 would allow greater flexibility and potential cost reduction. If one member already has a device and other members wish to purchase their own with the proposed allowance and if staff also select a hybrid option, then costs could run from a low of \$1,500 (where 15 users purchase their own; cost recovery is four months) on up to \$10,000 – with actual costs running somewhere in between. One hypothetical scenario would be YCH purchases 7 devices for board members and staff, while 1 member and 1 staff member use their own devices and 7 purchase their own devices using the allowance. Under this scenario, costs would be approximately \$4,900. In such a case, YCH would recoup its investment in approximately 1.3 years. Costs would be budgeted as part of the normal budgeting process.

CONCLUSION

The use of tablets for select staff will streamline operations and can be integrated into the existing infrastructure. Added benefits are the reduction of the use of paper and staff time to create documents, improved access to Board reports and Board activities. This is consistent with the YCH vision to create a sustainable and eco-friendly workplace, enhance productivity through technology and reduce environmental impact wherever possible.