



A complete guide for Records Managers

How to Pick the Perfect Public Records Request Management Software for Your Organization

Introduction

Public Records Managers know just how time-consuming compliance can be, particularly because of the other roles and responsibilities they have in serving their communities. The tasks can feel isolating and overwhelming as requests pile up for “any and all” records. As technology continues to advance, organizations face challenges with balancing the growing demands of time-sensitive compliance activities, along with other core mission projects in their community. These organizations must find public records request software that does more with less, automates workflows and uses technology to help reduce the burden on staff in an increasingly complex public records landscape.

The factors to consider when choosing and advocating for public records software can be overwhelming, which is exactly why Granicus is here to help. This guide will holistically explore everything that should be considered when selecting the right public records software.



What is Public Records Software?

Public records software is intended to help process public records requests from community members, the media, businesses, and other governments and automate the workflows designed specifically for these tasks. Informed organizations have moved away from processing public records requests manually using spreadsheets and emails and have, instead, opted for digital tools designed **specifically for public records**. In addition to recouping lost revenue that can be returned to the community, these organizations get anywhere from 20-60% of their time back. As a bonus, their data is more secure and they're able to provide more timely, accurate public records responses, which minimizes the risk of non-compliance and litigation.

Benefits



**Saves
Time**



**Saves
Material Costs**



**Increases
Data Security**



**Reduces
Request Volume**



**Reduces
Litigation Risk**



**Better, More Accessible
Service & Self Service**



**Improves Public
Relations & Trust**



"We have seen considerable time saved by using GovQA. We receive over 16,000 records requests per year, so this system has had a tremendous impact in our ability to manage such a heavy workload without having to hire additional staff."

— Gretchen Dolan, Public Records Officer, Washington State Patrol

How can a dedicated public records request management solution help to increase efficiencies, manage complexities, save money, and build trust through improved transparency? Read on for details.

The Rise of Public Records Complexity

Complexity is the state of being intricate, with many interconnected parts or features. In the context of public records, the causes of complexity are:

1

Scale

number of elements in the public records system

2

Diversity

the extent to which these elements are different

3

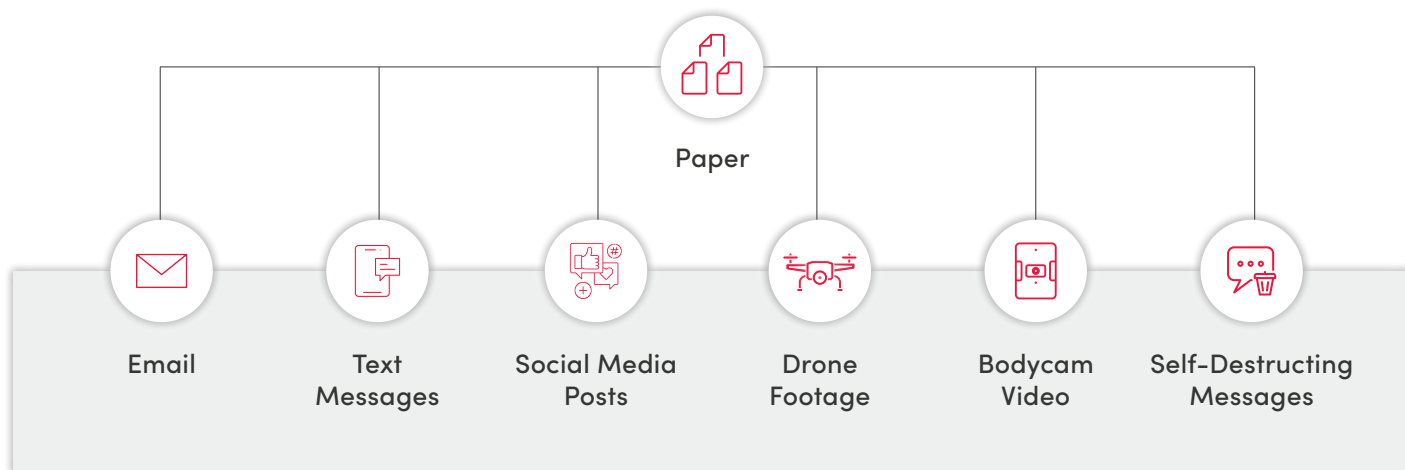
Connectivity

the relationship between components

If we step back and think about the drivers of complexity, changes to legislation are a common factor, which can then cause:

- » New release/retention schedules
- » New exemptions
- » New reporting requirements
- » New types of responsive records, such as police personnel files, bodycam videos, or the reclassification of records as newly responsive (adding state legislative records, for example)

When legislation changes introduce new responsive record types like bodycam video or text messages, the work of fulfilling requests for these new technologies is much more complex. There are now more files to comb through...new file types that are very different from paper files...and the files may be connected together as with threaded emails). Thankfully, software can help manage this complexity!



The world is continuously changing. The pandemic caused a shift to remote work and cyber-attacks have reemphasized higher security measures. These and other recent changes have altered the public records landscape forever:

1. Pandemic Shift to Remote Work
2. Police Reform Movements
3. The Great Resignation
4. Cyber Attacks
5. Extreme Weather Events
6. Election Uncertainties

Adopting modern public records request technology is a quick and simple way to address the [increasing complexity](#) of public records management. The right technology can empower staff by boosting efficiency and reducing administrative burden. In turn, the technology can free up resources that can be redirected toward your crucial missions.

Simplify Public Records Management		
Predictive deflection technology can allow requesters to self-serve (bypassing staff involvement and reducing request volume)	Optimized intake tools and standardized response templates can clarify needs and reduce the workload for staff	AI-enabled video redaction can process video 90% faster, and reduce the risk of litigation
Bulk actions can eliminate repetitive tasks	Automated workflows can centralize and streamline collaboration reducing total time spent	

Five Tips for Buying Better Software



Make a Wishlist

In a perfect world, what do you want to achieve with your new software? There will be plenty of time later to be more practical and focus on the budget. For now, make a list of those things you'd like to make easier and better through the digital transformation of your records management duties.



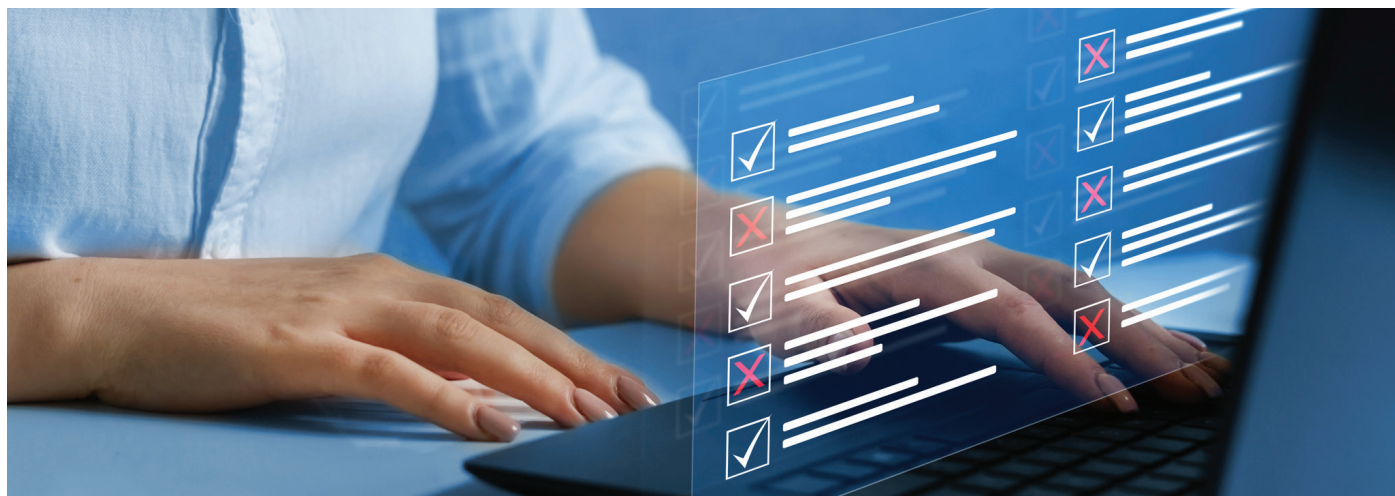
Bring People in Early

Connect with strategic stakeholders (executive directors, legal, and IT, for example) about your process and goals to help refine your wish list. Also ask around: Has anyone in your organization used public records software before in previous roles? They may have recommendations. By looping in stakeholders at the early stages of the process, you develop critical buy-in you that will be needed later in the process to support the choice of software you need.



See the Software in Action

Reading about software will only take you so far. After doing research online, schedule product demonstrations. How does the software stack against your wish list? How secure is your data? The product demonstration is an opportunity to get a better understanding of what the software can do. Ask questions! (Don't know what to ask? See "Vet the Company" and "Checklist for Getting Started" below.)





Remember Integrations

Can the solution integrate with other software you already have or plan to purchase? Whether your needs shift or opportunities arise, there will come a time when you want to add more digital tools to your toolbox. From video to email, single sign-on to payment connectors, the best solutions make integration easy. Integrated solutions reduce your workload, too. Rather than logging in to multiple solutions and transferring information from one place to the other, you can accomplish everything you need in one place. Integrated solutions also help you:

- Reduce contracting complexities
- Lighten the workload for IT management
- Offer a single point of contact for managing all your needs
- Reduce clicks that add up to real hours back in your work week



Vet the Company

While it's important that the software meets your needs, it's also important to vet the company making the software. Will they still be around when you need them years down the road? Here are a few things to consider.



Designed for Government

Is the solution designed specifically for government? If not, then it may overlook key requirements, such as CJIS and HIPAA compliance, which may not be ideal for you and your community members.



Maturity & Size

How long has the company been delivering software? Are they tried, true, and tested? Or are they green and still learning? Do they have enough staff to provide the level of service you'll need? Compare the number of customers to the size of the software's organization. Do they have dedicated teams for software development, implementation, support, and customer success? Are there enough experts to help you AND your peers in public records?



Finances

How sound is the company? Do they have financial backing to support stability, growth, and innovation?



Customer Success

Will the company ensure your success through experienced implementation that explores all your current processes, teams, and idiosyncrasies while taking time to configure the software to match your organization's needs...not the other way around? After go-live, are there ongoing programs (training, check-in calls, etc.) that help you get the most from your software, or will you have to handle all those things on your own?



Security

Are they committed to your data security? Do they have any certifications or validation to prove they are doing what is necessary to keep your information safe? There are many levels to data security. Look for best-in-class data security not just in the cloud host, but also in the software itself and the personnel who develop, maintain, and support the technology. Your team should seek assurances that the software code is secure throughout the entire software development life cycle and that all vendor employees are both background-checked and follow security protocols that are third-party audited annually or more frequently. Bring in your IT team to help you answer these questions.



Scalability

Invest in a platform you will not outgrow. A forward-thinking design that can be deeply configured to your needs for long-term flexibility, expansion, and effectiveness is best. Ideally, choose modular software with a single log-in for managing public records as well as subpoenas, legal holds, interagency requests, discovery, and other request types that can be automated across multiple departments, file types, and communication needs.



History of Innovation & Adaptability

Does the company have a history of innovation? Are they consistently releasing new products and features that improve your work or how you support your constituents? Do they have feedback tools and a customer advisory board that provides input on how to make their products more useful? Do they actively track legislative changes in your jurisdiction to provide proactive solutions to you on an on-going basis?



References

Does the company have solid references? Ask them for customers you can call to get first-hand feedback on their software, implementation, and support experiences.

3 Common Mistakes

At Granicus, we have spoken with many public records managers who, for a variety of reasons, chose another technology solution before switching to [GovQA](#). Their experiences offer key similarities to avoid when purchasing public records request management software.

1 Choosing Looks Over Functionality

Don't be distracted by superficial design elements. Stay focused on what really matters: The usefulness and dependability of the software.

2 Not Digging Deep With Configurability Questions

Whether you have a small, centralized team responsible for responding to requests, or a huge, decentralized team across multiple locations and security levels, the system you choose should not completely up-end your existing process or create complicated hurdles, roadblocks, or workarounds; it should simplify and streamline operations. Don't assume that it is possible to recreate vital existing hierarchies, security permissions, or sub-tasks in every software solution. Ask all the questions. If you get push-back early on, you can expect push-back during implementation. When you explain a unique way you do things, the answer should be - "No problem! We can set it up that way."

3 Not Getting Proper Buy-In

Public records offices do not operate in silos. Neither should software solutions. Loop in stakeholders early on to make sure you don't encounter any surprises or delays later. Target the city/county manager or state executive director, IT director, legal team, and anyone who either oversees, reviews, or contributes to the public records process.

Want to make sure you choose your "forever" solution and not just your "first" solution? We've developed 3 checklists to identify those features and functions that make a difference for [public safety](#), [education](#), and [state agencies](#).

Conclusion

If you are looking for a public records request solution, consider Granicus [GovQA](#). We help over 6,000 governments across the U.S. get their jobs done faster and more efficiently through a platform of digital government solutions, including public records request software designed specifically for governments.



"I would recommend GovQA to anybody. If they're still doing things the old-fashioned way like we were doing them, they're wasting a lot of time and money."

— Lisa Linden, Records Supervisor, Volusia Sheriff's Office (VSO)



"We reduced our average open records request completion time by 66% while experiencing a 673% increase in request volume during the same time period without a single violation of open records laws."

— Moraima Montenegro, Public Information Officer, San Antonio, TX



"The online public records portal is the next step in the ongoing effort to increase transparency within Riverside city government. The portal enables anyone to file a public records request from their computer, phone, or tablet, while also allowing the public to see what other documents are being requested."

— Colleen J. Nicol, City Clerk, Riverside, CA

For more information visit: granicus.com/solution/govservice/govqa or contact us at info@granicus.com