

Neola's New Policy Publishing Tool

Live Q&A Session Transcript

Introduction & Resource Center Overview

Christen Clegg: I'm going to kick this off by welcoming everyone. We are excited that you're here to learn more about our new policy publishing tool. Thank you for paying attention to the announcement, registering for today's session, and taking time out of your busy schedules. One of the things that we are hoping to do with this session is answer the majority of your questions about why we built this new tool, why we are migrating you from the BoardDocs solution over to Neola's own tool, and what that migration process is going to look like. Before we get started into the migration pieces—and we also hope to show you a sneak peek at the software itself today—I did want to go through our new Resource Center. We shared this link in the email announcement sent out on June 1st, but I wanted to walk you through it because it is going to be our new home for all the resources that will help you through this migration process. As we roll out enhancements for the tool, you can find all of those resources right here. I will share a link to this in the Q&A section as well after I get done so you can bookmark it in your browser and come back to it later.

Tool Benefits & Pricing

Christen: To address the first main point: what is the new policy publishing tool? This is going to replace the current solution that we have with BoardDocs with a new tool that is going to be more stable, more reliable, and give you better access and a better way to manage your policies ongoing. We built this specifically for Neola clients because we best understand your workflows, and we work with you to make sure that you manage your policies in the most efficient and effective way. This tool was built with all of those capabilities in mind.

Some of the new benefits that you will receive immediately out the gate include a more stable, reliable platform that is readily available whenever you need it. It's going to be available during all of your meetings and it will be able to scale based on your individual district's needs.

Regarding the ease of use of the tool, you're going to see some really cool features today, including mass exporting to PDF with a couple of clicks and the ability to use drag-and-drop technology between the different categories and sections of your workflow. You will also have better accessibility, the ability for everybody to access it at their level, and historical archive tracking on who has made changes to your policies before publishing them. It is going to give you a lot of advanced features that you have not previously had.

A couple of the questions I've gotten from some clients over the past week or so since the announcement regard whether our costs will change. No, the answer is no. We are not changing our digital maintenance fee; it will remain at \$795 for the 2026 and 2027 billing year. This comes at no cost to you. This is actually something that we've invested in purposefully, and we intend to continue to enhance the solution as we move forward.

Transition Timeline & Support

Christen: In terms of the transition and timing, we plan to transition all of the districts over to your new Neola policy publishing tool site in July. Our tentative date that we're aiming towards is the week of July 6th, but we're going to keep that in flow to make sure that we've got everything teed up for your district. You'll get more details and direct links via email to help you prepare for that in advance.

Will there be any disruption to your current work? No, our goal is to make this seamless and to move all of your policies over to your new site without any disruption, making sure that everything you have in terms of historical policy management is right where you need it when you make the migration change.

In terms of support and training, we do want to offer several resources for you. Obviously, this hub—this Resource Center—is one of them. Once the tool is available in July, you will start seeing additional support resources in here, like mini tutorial videos and 3-minute clips to show you how to use some of the new features and walk you through the process so that you can self-serve.

If you want one-on-one support, you can always reach out to Neola Support at support@neola.com or give us a call (the phone number is listed here as well). We will be hosting a series of training sessions in July. I've included those dates here on the FAQ, and you can pop in right to this page to access the links. Go ahead and register for any of these sessions. We've got a couple on July 10th, and then we have sessions on the 13th, the 16th, and the 22nd, so you can go ahead and get those on your calendar at your leisure.

We have a bit more to share about the migration process itself today, so I am going to turn it over to Scott Westhoven, who is Neola's VP of Operations, to share more information about the migration and show you a sneak peek at the tool. Thanks again to everyone for being here.

Migration Details & Data Handling

Scott Westhoven: Thank you, Christen. As Christen mentioned, we do plan to start our migration in July—early July if possible. One of the unknowns is still getting our data from BoardDocs. Once we have more definitive dates on how the information will come over to us, we will be able to share that with clients in a follow-up email.

There may be a short downtime in BoardDocs. It is not that the BoardDocs site will be unavailable, but we may ask that clients do not make changes for a period of time as we are migrating data to the new platform. If clients need to do additional work on policy content or prepare things for a board meeting, for example, we ask that you work with your Neola Associate on the best practice to make sure we don't lose any information during that migration period. More details will come out about that as we get definitive dates from Diligent.

We do anticipate the migration being completed by the end of July, and we expect to be working in the new platform from that date forward. All our follow-up updates are scheduled to go out in the new tool, and clients will have ample opportunities to partake in different training sessions and utilize self-help resources if needed.

Some of the other site features that questions have come up about concern public links to existing policies on your own websites. We will be able to update those links with the new policy URL. If you are wanting that new URL, please work with your Neola Associate to contact us on how to update those links. We will provide more specific URL data once the sites are made

active, but we can work with you ahead of time if you need some lead time to make those transitions.

As I stated before, the BoardDocs site is not going to go down when we make the transition to the new platform. We will have an overlap period that we anticipate going through the end of September, but we would like to complete all migration work in August just to make sure we have ample time to transfer any data that may have been worked on after our initial migration. One of the things that will come out in the follow-up email is a request for up-to-date contact information. We want to identify the primary admin for the new platform for each school district. Christen will be sending out an email that will include a link to provide that data to us. We're also going to be working with our Neola Associates to reach out to each district to make sure we have complete records of who is the ideal administrator for each district, so that will come out later this month as well.

Some of the other questions that I've been getting about the migration: if you are using BoardDocs LT or Pro sites for agenda solutions or are using their library, those will remain active for you. You will be able to transition your policy link to Neola's new policy tool, so you'll still be able to access your agendas, your policy, and everything you do in your LT or Pro sites through BoardDocs. Our platform will also be able to link to any other agenda solutions you may be using currently, and we can help guide you through that process when the time comes. Christen, do you have any other questions that came through the Q&A?

Q&A Session

Christen: Yes, I think we have one that we want to clarify right out the gate. One of the questions is: is the new platform Diligent?

Scott: Nope. This new platform is 100% Neola. We built it from the ground up, and Matt, who is on the call, is our developer for this platform. He is spearheading the complete development of it. It's a brand new platform focused on policy first—developing policy, presenting policy, and adopting policy. It's all focused on our clients.

Any other questions out there?

Christen: Yes, we had one more come in that we might want to go ahead and address: will the URL links always be static and show their current policy, or will the link continue to change when policies are updated?

Scott: We've gathered a lot of feedback over the years, and one of the common requests we've gotten regarding our current platform is static linking to the active policy. Matt has built that in, and I'll show that in the demo.

Christen: Great. Are you going to offer agenda solutions if we currently do not use this through BoardDocs?

Scott: Once again, our focus is on the complete policy lifecycle, and part of that lifecycle is adopting policies. Managing those board meetings to do that work goes hand in hand in our mind. We've had a lot of clients ask us about this already, and we do anticipate building an agenda platform. If all goes as planned, we will have something ready to test before the end of the year.

Christen: Yes, we're very much listening to our clients' requests, and we're listening to you guys to help guide us on where we go with the platform itself. So please, let us know what you think would best benefit your district.

One of the other questions that came in is: does the new tool allow for users to translate into other languages like you can on Google?

Scott: There has not been a direct build for that in the new platform, though it has been a question we've gotten over the years. One of the concerns is the accuracy of some of the Google translations and other services out there when it comes to legal language. I know it can be a good tool to use in a pinch, and we'll continue to address that. I know technology is transitioning very rapidly on that front with different AI tools. If we find there is a solution that is adequate for policy work, we would definitely be willing to integrate that into our platform.

Christen: Awesome. Okay, another question, Christen, just to hit on the agenda solution piece again: we currently do not offer an agenda solution. This is just a migration of your policies onto Neola's own hosted platform for your policy publishing needs. So your agendas, whether they be in BoardDocs, another solution, or maybe even just a PDF on your website, will continue to stay in that software. You will simply link out to your policy site just like you do today, except the platform it is supported on is now hosted, owned, and supported by Neola. I hope that clarifies. Scott, would you add anything else?

Scott: Yeah, just to be really crystal clear, the migration of data that we're pulling from BoardDocs is going to come exclusively from the policy tab. If you have an LT or Pro site and you have a library tab or an agenda tab, none of that data will be migrated over. It will all still be accessible on BoardDocs, as all LT and Pro clients have a separate license or contract with Diligent that goes beyond Neola's policy support.

Christen: So I'm going to reiterate some of these same questions just to make sure we get to them all. "So Neola will no longer be compatible with Diligent BoardDocs community?" Compatibility is not what's changing here. We are hosting them on our own policy publishing tool, so you will no longer use BoardDocs to manage your policies. However, we do not have an agenda solution at this time, so you will continue to use your current agenda solution and use Neola's tool to manage your policies exclusively. They are compatible in the sense that wherever your agendas live today, you will simply point to your policies on Neola's new tool. You will have your own new policy site with a new link that will be emailed to you in early July during the migration process. To answer Tracy's question: we will no longer be using BoardDocs related to policy editing and housing. That is correct.

All right, I'm going to jump to another question about ADA compliance. Will it meet ADA compliance?

Scott: Yes. One of the core pillars of our build was to meet the accessibility guidelines that our school districts are asked to uphold, and Matt has built the platform with that in mind. In fact, there is a separate public site, which I'll demo in a little bit, that is built mobile-first—so it's accessible on your phone, on tablets, and on a computer. It is built with those guidelines in mind for accessibility. We will continue to improve and enhance those tools as we move forward. Another piece of that is how policy forms and other documents are managed on the platform, and we will build out some guidelines on best practices for maintaining complete accessibility for your constituents.

Christen: Awesome. Thank you. We do have a couple of questions about upcoming updates. This one was particular to Florida, asking if they will be working on the update in the new platform.

Scott: Let's see. The update for Florida is scheduled for, I think, August, and we do plan on building that in the new platform.

Mandy: The release for Florida is actually in the next week or two, so it's not August, just an FYI. For those who are asking about the update in Florida, we will still be pushing it active in BoardDocs, but we would like to transition your workflows into the new system. You can do your pre-work in BoardDocs to prepare it for your board meeting.

Scott: Thank you, Mandy. Sorry about the confusion there.

Christen: This question piggybacks off of the last, which is: where do I make changes now versus until the software comes out in July? Jennifer writes, "I have a number of policies that are in the middle of being updated and going to the board. Will I still have access to the changes or will I need to start over?"

Scott: No, you'll still have access to the changes in BoardDocs. As I said, the best practice here is to work with your Neola Associate to determine at what point in time we need to take a pause on that development. When the data gets pulled from Diligent and handed over to us, there will be a hard date where we will be able to capture all those changes. Any changes that happen after that in BoardDocs will require either a manual transition to the new platform or a re-import if they are excessive. We'll work with you on that, so please go through your Neola Associate to come up with the best plan.

Christen: All right. Another question from Denise says, "When you say policies, does that include our guidelines as well?"

Scott: Correct. Anything in the policy tab in BoardDocs currently is what we will import into the new policy tool.

Christen: Another question on AGs: "Will AGs be live-linked from the parent policy?"

Scott: Cross-references, yes. That's something that we are looking to build out in the new platform. On day one in July, I'm not sure if that feature will be ready yet, but it is something that we are looking to easily integrate moving forward.

Christen: Another question from Jay: "Will we be able to have public view of policy but only school staff view of AGs?"

Scott: That is another feature that has been requested: to have a published private book. That is a feature that Matt is working on. Once again, I don't think it is available as of today, but it's something that we would like to make available early on after release.

Christen: Great. A question from Deidra: "What happens to the other book folders we created when it transitions to the new platform? Will they be transitioned over as well? We have a book we created called Recent Policy Updates that provides the public and staff a list of each board adoption and what was included."

Scott: Yes, once again, any of the books or sections of materials that are in the policy tab will be migrated over.

Christen: Great. Lisa has a question about BoardDocs: "We were told last year we wouldn't be able to use BoardDocs anymore and we had to migrate to Community. I questioned several times about Neola policies and was told everything would stay the same. A little notice that this was in the works should have been sent out. I just happened to see this webinar show up in my email or I wouldn't have known."

I can answer part of that and then I'll turn it over to Scott. We wanted to give you as much notice as we possibly could. The reason we had to keep this under wraps is because we have not

been able previously to get your data from Diligent. Until we had that piece negotiated, we were not allowed to pull this out into the open. We would have loved to have told you much sooner, but we appreciate you guys jumping on with us and working with this process for migration over the next couple of months. We promise that in terms of support, you will get the kind of support that you expect to receive from Neola—from your Associates, from our production team, and from our support staff. We hope to provide a white-glove, five-star experience in this process for you.

Some of the recent instability of the BoardDocs platform is what has really driven us to increase our timeline and push this out as soon as possible for you. I don't want to point too much to what didn't go right, but I think we're all aware of the instability of the platform increasingly over the past couple of months. That drove our sense of urgency to get this to the finish line as soon as possible for you. Matt, who you can see here on this call, is our developer; he has a lot of experience building these solutions in the past, so he has been working around the clock to get this ready for our clients. What we've done as much as we possibly could is put our clients first through this entire project and gotten you guys the information as soon as we legally could. I hope that helps answer the question.

All right, I'm going to move on to a question from Leana: "How will the migration impact policies that are in the process of amendment during the migration process? We tend to amend a lot of policies in July due to legislative updates."

Scott: Any work that you need to do in July, there will be a date and time when we will want to migrate that over to the new platform. Depending on your exact schedule of amendments, you can definitely continue to do that work in BoardDocs. Just work with your Neola Associate to help communicate with the transition team to make sure that we capture anything that may be revised after we pull data from the platform. We're not going to lose access to anything in BoardDocs during the month of July; it just may be something that we need to manually track to make sure it gets migrated over after we pull the data.

Christen: All right. Does Neola have any future plans for work with the BoardBook board meeting platform?

Scott: We're not going to be partnering with any of the other providers of agenda or policy solutions. As I said previously, we're looking to build our own out. But if you are using BoardDocs, BoardBook, or any of the other solutions for agendas or meetings, you can link our policy in both those platforms to their policy link or tab, and I'll show that to you on BoardDocs.

Christen: All right, great. It looks like we have a few more we need to still tick through, they're still coming in. "Did I hear you say that we will be able to mass export and print PDFs for our policies?"

Scott: Yep, the export tool for PDF, for Word, and for text (if anybody's using any AI platforms) is available in the new platform.

Christen: All right, another question from Amanda Taylor: "We are still working to approve our manual for the first time with a scheduled policy meeting on July 6th. Will editing be an issue in June prior to this meeting?"

Scott: Nope, you'll be good.

Christen: All right, great. Larissa is just clarifying that it's not accessibility across the various platforms such as mobile or tablet that she's asking about—she wants to understand better

about accessibility for people with disabilities, especially those who rely on screen reader technology.

Scott: We've been doing some testing on the public interface with some of those screen readers and navigation tools, and it's showing right now that it's very accessible. As we progress further, we've talked about other enhancements for anybody who has disabilities and uses either high contrast or screen readers to navigate. We will continue to make improvements on that front, but as of right now, my testing has shown that it's very accessible.

Christen: Awesome. Thank you. I just want to flag a comment that was getting a lot of likes. It's not a question, but: "Looking forward to seeing the product and what the new platform actually looks like." Hang tight! If you've got time to stay around with us, we're almost through the Q&A, and then we're going to show you a sneak preview of the tool.

All right, let's see here. "What kind of training will be provided? This seems to be happening fast."

Scott: Very fast, I agree with you. We are offering, at least in July, one or two group sessions a week, and if we see that there's a high demand, we'll add more sessions. Beyond that, we'll continue to offer our regular online sessions for training throughout the end of the year. In addition to that, Christen pointed out the Resource Hub that we're building out. We will have a lot of self-help tools on the new platform for the various steps you would need to take to complete a policy update or policy drafting.

In addition to that, we have our individual trainers and support staff who will be able to take phone calls and work with people on a one-on-one basis, as well as our Associates. Our Neola Associates are always on the front lines of training and support for our clients, and nothing will change with that. They will still be available.

Christen: Okay, a couple more product-related questions: how will the Neola migration change the way policies look in BoardDocs?

Scott: I'm sorry, can you say that one more time? I was reading one of the chats.

Christen: No problem. How will this Neola migration change how policies look in BoardDocs?

Scott: The migration to the new platform won't change how they look in BoardDocs at all; there will be no change or noticeable differences. However, on the new platform, things will look considerably different. If you are still using the LT and Pro site, when you link to our policy platform, there's a policy tab button in the upper right-hand corner of BoardDocs. When you click on that, it will take you right to the new platform. I'll demo that here in a little bit. But yeah, nothing else will change during the transition period.

Christen: Yes, one more question on the features and the look and feel: "Will there still be a draft section that only staff editors of policies can see, with no public viewing?"

Scott: Yeah, so in fact, not even just a section—we actually have a whole separate site for policy editing for people who have login credentials. Matt has built out a very granular approach to permissions, and we will go over that in training in more detail, but those will all be internal processes for the district.

Christen: Awesome. Someone else had asked, "Will we do a preview of the platform during the session?" As soon as the Q&A slows down, yes, we are going to pop over and show you the tool itself. A lot of people are waiting on that, Scott.

"Is there anything we should do to prepare for the change?"

I'll go ahead and take the lead on this one, Scott. We are going to send you a couple of emails over the next three weeks to help you prepare. The next email you're going to receive is going to come from me this week. It's going to have a couple of links in it that I want you to take action on. One, if you don't mind, complete the contact form and make sure we have everyone in your district who needs to be a part of this migration—any publishers in your district, your secretary, your administrative assistant, maybe even your policy chair. If you want them to receive any information about the migration, just complete the form and send me their email and contact information.

The next piece of information that will be in that email this week will be the links to the training sessions taking place in July. I've already got them scheduled and actually already have registration links for all of those sessions in the new Neola Support Hub, which I will email out with the recording of this session itself. That's the next communication that you will get, and you'll need to read it, take action on the contact form, and then go ahead and schedule your time to register for one of the July training sessions.

The next communication you're going to get from us is going to come in early July, and that's going to have all of the migration details in terms of your new public URL for your policy site. That will be something that you'll work with your IT team to update on your website, whether it lives directly on your site, within your BoardDocs, or within your board book. You will then have that new URL plugged in for the public site. Scott, do you want to answer any more migration pieces there?

Scott: No, like I said, keep your eye out for the emails coming from Christen, which will walk you through the various stages. If you're doing or planning to do work in July, work with your Neola Associate and we'll keep them informed of our timelines and workarounds. Identifying the administrator for each district who's going to be in charge of setting up the sites and permissions will be important for us to have. We've built the site to be as user-friendly as possible, so I think it's going to be a fairly easy transition and everyone will be very excited about it.

Christen: Right, I'm going to take one more question, and then we're going to go ahead and pop over to the preview because we are running out of time and there are a lot of people ready to see the product, Scott. The last question I'll take is from Jacqueline: "We only use BoardDocs for policy. How long will our BoardDocs be active until these logins are deactivated?"

Scott: We will have the sites available through the end of September. After that, the BoardDocs sites will go away unless you have an LT or Pro account with BoardDocs.

Christen: Right. And then I'm going to take one more question because it's come up many times, and then I'm going to turn it over. "Will the policies connect to your board book platform?" Your policy site can be plugged in anywhere that your agenda lives. So whether it lives in BoardBook, BoardDocs, or as a PDF on your website, you will simply receive a new public URL link for your new Neola site, and that links out from your agenda. We are now hosting everything on a more stable, reliable platform that's not going to go down during board meetings, and it's actually going to have search functionality that works, among many more things. So I'm going to turn it over to you, Scott. Let's share the new baby with everybody. We are excited to hear more questions, and we'll come back to the Q&A at the end. We'll stay on as long as we need to.

Live Demo & System Walkthrough

Scott: Okay. Thank you, Christen. All right, I'm going to go ahead and share my screen here. Christen, are you able to see that all right?

Christen: Yes.

Scott: Okay. I'm going to demo just a couple of the features of the new platform. This would be the main screen of what you would see when you're viewing or editing policy. Things are very customizable here in terms of layout and how much information you see where. One of the new features I think everybody will be excited about is a compare tool. This is the Neola update right here with all the track changes, and this is a copy of the current policy for the district. I can choose to edit either one of these documents, and I'm going to click on the publish tool here for the district's current version of the policy. My screen is zoomed in here, so I'm going to go ahead and do full screen just so you can see what that would look like if I want to edit just that straight document. I'll zoom out here so you can see a little better.

If I want to copy and paste material from the template over to the district site, I can do that with no problem. I can highlight this here, copy it, and replace this paragraph with the new content, and it'll show it in track changes. In addition to showing the template here on the right, I can actually go in and look for different documents. I don't remember if there's an AG for 5112, but if there was, I could bring that up so I could look at and compare the AG to the policy. The compare tool, I think, will be really exciting for districts and associates alike. There are also some spell tools and things that you can utilize to improve your workflow as well, okay? So that's one feature I wanted to show.

Once you've revised your policy and saved it in the system, a typical workflow would be to copy this material and print it out as individual PDFs to share with your board. In this system, I can actually use a drag-and-drop feature to move it over to a section I created for Policies for the Board. I just dragged that material over and that document's there. I can also highlight multiple documents holding the shift button and drag all of those documents in there as well. Then, any policy that I've revised and am ready to share with the board can be brought over. If I hold the command or control button, I can select random documents and drag those into the Policies for the Board section.

So now I have what I would consider a board packet available, and I can right-click on the section, export that as a PDF, and create a board packet on the fly. It comes with a cover page, so whatever the section name was, you can change your title here. There will be a table of contents that you can click on to get to the specific document you're looking for. On every document, there will be a page number and line numbering. If I wanted to reference a board meeting, I can say I'm on line 23 on page 18, where we're talking about Responding to Outbreaks. Track changes are also available on this document when you're sharing it with your board, okay? So that's board packets and creating exports in PDFs, which you can then print just like you would any other PDF, okay?

The other thing I wanted to show is the public site, so I'm going to click over here. I am once again zoomed in so you can see easily enough, but you'll have a homepage. A lot of the formatting and—as one of my associates said earlier—"gussying up" of the site will probably change over the next month, but for the most part, you can access your policy and AG manuals by clicking into them. You can navigate to each individual policy and quickly jump back into different sections to identify what content you're looking for.

Regarding the search feature up here, if I search for the word "student," for example, it will give me a result of everything containing that term. The search will highlight the word that I was searching for, so you can see here in the policy the different instances of the word "student." Navigating back, I can now add a second word here to refine my search. A space acts as an "and," so I'm looking for student and board—not necessarily the specific phrase, just both of those words in any policy. You can see my results have changed a little bit, and if I click here, I can see the word "board" highlighted here, and if I scroll down, I can see the word "student" highlighted here. Now, if I wanted to search for a specific phrase, I can use quotation marks to do a specific search, and you can see that there are no results for the exact phrase "student board." Nowhere in our policies do we have that specific phrase, but you can bring it up and specify your search by entering multiple words together to search for both words, or use quotation marks to search for specific phrases.

Once again, this site is mobile-compatible, so if I were to use a mobile browser, things would adjust. Matt showed me an easier way of doing this demo, but I wasn't prepared for that. But if I am in a mobile format here, you can see the section menu goes up to the top, making it still easy to access and view individual policies. Also available to your district is a complete PDF of your policy manual. If you wanted to see all 449 policies as published in this case, you could click on any item in the table of contents to get to the policy, and then return to the table of contents very easily. So that will be available to you as well.

We talked about how this will work in BoardDocs if you have an LT or Pro meeting site. This is our test Pro site in BoardDocs, and what I did is I replaced this link with the new policy tool by Neola. You will be able to access the latest and greatest policies right from your LT or Pro site in BoardDocs, okay? So that's available there.

The last thing I want to demo is our home site for your district website, where you can see the various books. One of the other features Matt has incorporated is an insights tab. If I click on this, you can get an idea of who's visiting your policy site, which policies are trending for the month or all time, the top books people are searching for, and search inquiries as well. This is going to show general search topics rather than specific search queries, but you can see over time what people are searching for and what results are being found. For example, my search for "student board" never comes up with a result—it's always zero—but you can track different search topics and the results, as well as how long ago the search occurred. We feel like this insights tab will be helpful for district administrators to understand how people are utilizing their public sites.

Alright, so that is a quick demo of just a couple of key features on the site, focusing on policy comparison, dragging and dropping documents between sections, exporting different subsets of policies, and viewing your public site and its accessibility.

Christen: Awesome, we got some really great feedback on people being excited about some of the features and things they were hoping for. Someone said "game changer already," and "good work Neola." We appreciate the positive feedback. We obviously still have some questions, and I do want to make sure we try to get through all of them live if possible. For the people who cannot hang on past the top of the hour or need to jump off now, I totally understand. After the session is over, we'll go through and cover the remaining questions, and we will keep adding to the FAQ document so that you can reference it there. When I send out the recording and the contact form, I'll make sure you guys have a link out there so that you can review the FAQs. But

I'm going to still try to get to everybody's question before we hop off here today, so I'm going to start back up at the top where we left off, Scott, if that works for you.

Scott: Sounds good.

Christen: Okay, so one of the next questions was: will Neola provide instructions on the steps for public use and information so the districts can notify the public? In terms of that, I feel like the answer is yes, and it's something that I haven't put together yet. I appreciate you bringing that to my attention, Jennifer. I think that's a good call out. We'd be happy to create a template for a press release or a formal announcement that you could send out or post to your website, so I will put that on my list. When that becomes available, I will point to it in the new Neola Resource Hub.

The next question is from Heather: "Will the redlining and text editing functions be more similar to Microsoft Word? Did that demo answer that question?"

Scott: Yeah, to be honest, the initial release of the platform is going to use the same CKEditor that is currently available in BoardDocs. Matt has refined those tools and spruced them up a little bit; they're a little bit more accessible and easier to read contrast-wise for anybody who has impairments. So far, using them has been pretty easy, but it is not going to have the exact depth of iteration that Microsoft Word may have. I know they have a lot of customizations regarding what content you see and how you see it, so it's not going to be quite that elaborate, but I feel like it will suffice for what our policy needs are.

Christen: Another question from if we export a working policy to PDF, how will the track changes show in the new platform?

Scott: Track changes show very similarly to how I demoed. The additions are going to be in green, bold, and highlighted in green with an underline. The deletions will show up in a red highlight with red text, a strikethrough, and bold as well. If you look at them in black and white, they are still very visible, but they will show up in a PDF or a printed document.

Christen: All right, another question from Jenny is, "Will we be able to edit draft policies as needed on our own?"

Scott: Absolutely. There will be a workflow just like there is in BoardDocs where you move a document into your draft book, create any edits you want—even if it's outside of Neola's update cycle—and submit those to a production book for our production staff to process and publish for you.

Christen: Another question from Donna is, "Will there be specific training for board members?" We have six trainings scheduled in July that they may attend if they would like. However, if your board would like training specifically for them at a specific time and date, that might be the best way to do it—to get them together and then schedule some time through your Associate. Probably after you guys get settled in with the administrative office would be a good time to schedule that. We also have some dedicated IT trainers on our staff—Kim St. James and Ken Brown are two of our individual trainers who have been supporting board members through BoardDocs' ups and downs—so they will be available to work with your board directly as well. If you'd like to schedule time for your board, just reach out to me, let me know, or reach out to Neola at support@neola.com and we'll start to get that on the calendar.

Scott: In addition to that, the Support Hub that Christen mentioned will have some recorded sessions, and we can definitely tailor one to viewing policies in the new platform and the steps that board members would take, which would be different than what an editor would do.

Christen: All right. I'm going to skip past some of the positive comments and get back down into the questions. One of the questions was: "Is there closed captioning for this meeting?" We did not turn on closed captioning, my apologies, but I can provide a transcript of this meeting. If that's something you're interested in, just shoot me an email at cclegg@neola.com, and I'll pop that in here as an answer to that.

The second part of her question is, "Did you say that logins will only be active until September? Does this mean that the contacts you are requesting be updated will all be receiving new logins?"

Scott: The login process for the new platform is based on your school district email. The contacts that you provide to Christen in her form or to your Neola Associate will get added to the new platform, and they will log in using their email. There will be no specific username like there is in BoardDocs; it will be an email address.

Christen: Next question from Debbie is, "When the agenda part is added later this year, will it be an add-on or part of the new platform you are previewing?"

Scott: It will be an add-on service. It's something in addition to what you pay for for policy publishing. We anticipate it to be a very reasonable and competitive cost compared to other solutions out there.

Christen: Some feedback from Cindy: "Can we start using this tomorrow? This is so much nicer and seems to load very smoothly between tabs."

We are so glad that all of you seem to be really excited about the sneak preview and the tool's functionality. We could not wait to share it with you, and we promise that it will only get better over time. The way BoardDocs was originally built, prior to it being acquired by Diligent, was entirely based on user input and requests. Neola wants to pick up that ball where it was left off, move it forward for you, and not only support the platform to make sure it does what you need at a basic level, but continue to provide enhancements that truly benefit our clients, your individual needs, and workflows. Those are typically put into a ticket system, so you send us requests, and based on the volume of requests we get for different features, they get prioritized. That's how that works, so please communicate and let us know what you'd like to see once you get into the tool and get your hands on it.

Scott: As Christen mentioned earlier, we had to move very quickly and move up our timeline in response to some of the issues we were seeing in the current BoardDocs platform. Our goal was to release a version of this platform in July that is at least compatible with what you can do in BoardDocs, along with a few key feature enhancements. But our ambition is to build a platform that is highly user-friendly and accommodates all the needs of a policy client, and we will continue to iterate on this to get to that point.

Christen: One question from Valerie: "Can you combine policies and guidelines so they appear together? Our families want to go to a policy, read it, and be able to see the accompanying guideline right away, without going into another book to see if there is one. Same with forms; any forms should accompany the policies they go with."

Scott: One of the questions earlier was about cross-referencing policies or related policies and AG content, and that is something that we plan to incorporate into this platform. I've already talked to Matt about how, if you have a policy and a guideline, they go hand in hand rather than being separate. It makes a lot of sense to be able to search and view those together.

Christen: All right. Let's see here. "I love the new changes. It looks like it will be so much easier to use. Will the track changes have background highlights? Some staff have had issues viewing the green."

Scott: Once again, accessibility has been at the forefront of our process. Not only will they have the green and red highlighting, which isn't always usable for everybody, but there will be a bolder highlighting so that even in black and white they still show as a highlight. In addition to that, there is a definitive underline for additions and a strikethrough for deletions.

Christen: Another piece of feedback from Steven: "The insights feature is awesome. We often wonder which policies to review with our administrators, and it's helpful to know which may be of the greatest public interest."

That is one of the features and requests that came from our client advisory board. "Game changer, being able to be aware of policy and public interest will be helpful in making future changes and understanding what may have pushback with the board as well." "Love the addition of the analytics and trends. Just to confirm, this would only be available for internal staff, not the public, correct?"

Scott: Correct.

Christen: Correct. "Love the side-by-side comparison view and enhanced functionality and usability features. Can you save each packet you create? For instance, a packet for each board member or specific agenda items?"

Scott: Absolutely. You can create as many sections as you want and drag any documents you want into them. If you need to create something specific for different groups of people, that will definitely be available. We showed you a draft book for policies, but you can have multiple books for different items. We know clients have been very creative in BoardDocs in terms of how they use books, and that will be able to continue in this new platform.

Christen: All right, great. One more question on that one: "Will the breadcrumb revision dates and names be recorded on the internal version of policies?"

Scott: Yes, iterations and revision history will be available. We have a detailed section—I didn't showcase it—but it's a detail section where we will capture the adoption dates, revised dates, retired dates, reviewed dates, and future reviewed dates. These are things that our clients have asked for over the years in terms of managing policies and date iterations. So, yes.

Christen: Awesome. Okay, this question has come up a couple of times. Michelle says, "Can you talk about how this relates to the BoardDocs contracts? We did policies through BoardDocs previously, so does this change our pricing with them? Do we have a new contract with Neola or how does that all work?"

Scott: Nothing with Neola's agreement is going to change. As Christen stated earlier, our digital publishing fee, which gets billed every August, isn't going to change this year. Your agreements with BoardDocs I can't speak to as much. If you are just using policies in BoardDocs, that whole site is maintained and operated by Neola, so that will end at the end of September. If you are purchasing BoardDocs LT or Pro sites, I know Diligent has talked about sunseting BoardDocs at some point in time, and they have made a push to get people onto their Community platform. I have not received any word on how they are going to handle that moving forward, but my guess is they're still going to make a push to get people to migrate away from the existing BoardDocs platform.

Christen: Another question: "Will there be a way to select multiple policies and print to individual PDFs so I get five PDFs instead of one?"

Scott: Absolutely. You can export a whole manual, or you can choose individual policies in a picker list where you check the boxes for the ones you want. You'll be able to export out as many as you want in PDF, text, or Word.

Christen: Another question, I think an interesting one from Jenny is: "For staff-only view of AGs, when that is in the works, would Google single sign-on be an option?" Matt just got that one answered. We don't have single sign-on yet, but it may be something we implement in the future. However, on day one, you can add private users. To log in, they enter their email, and it will send them a log-in link. It's very easy, and you control what each user sees with read and/or edit permissions.