

Take on Board Podcast – Episode 220

Transcript – Tammy Atkins brings you Tammy's top tips for making the most of digital board papers



Helga Svendsen 0:00

Today on the Take on Board podcast, I'm speaking with Tammy Atkins about being a digital savvy director, and about the transition to digital board papers.

Before we start that discussion, I'd like to acknowledge the traditional custodians of the land on which we record this podcast today. For me, I am on the unseeded lands of the Wurundjeri people of the Kulin Nation and I pay my respects to elder's past and present. I acknowledge their continuing connection to land to waters and to culture. I support the Uluru Statement from the Heart and some may have seen recently I joined a group called Directors for Yes, there's a bit about it on my LinkedIn if you want to have a look there. I support others to also support the Uluru statement from the heart and if you wish, also joined Directors for Yes.

Now, let me introduce Tammy. Tammy is and has been on a number of Victorian government boards and she's also been a councillor for the Rural City of Wangaratta. She's a regionally based non executive director with expertise in community and stakeholder engagement, strategic writing, and governance level knowledge of industry sectors, including TAFE and water. comfortable with technology. Tammy holds qualifications in cyber strategy and risk and is interested in digital literacy initiatives. She's also a Fellow of the Australian Institute of Company Directors. Tammy, welcome to the Take on Board podcast.

Tammy Atkins 1:20

Great to be here. Thank you for having me.

Helga Svendsen 1:22

Oh, such a pleasure. We've got so many things we could dig into already just in your bio. But I know we're talking about digital board papers today. And even before we do that, before we dig into that topic, let's dig into you. Can you tell me a story about young Tammy, that tells us a bit about how you got to where you are today?

Tammy Atkins 1:40

Sure. Well, to start off with hello from Taungurung country. I live in a farm up here in Northeast Victoria. And I've almost always lived in regional Australia growing up in Meekatharra in central WA and I did my university in Kalgoorlie. And for me growing up in the country really instilled that sense that you've got to be involved and contribute if you want to get things done or to get things better, or to be the best that they can be. And so I was always involved in things and always doing things, I'm very action orientated. And one of the ways we can do this, I think, is by contributing our skills and our knowledge at that board level.

And when it comes to my personal vision, I have a daughter and I want her to be able to, and to want to grow up and live and work and one day raise her family in country Australia, knowing that our small towns and our regional centres can offer really big opportunities. And if she does choose to one day head off to the bright city lights, then that's fine. But I want regional Australia to be ripe with opportunity, especially for our young people. And for that to happen, part of the puzzle is having those strong and effective regional institutions that have really big, bold, achievable visions. And that takes effective governance. And that's where I think or I hope I'm helping make a difference. So that's, that's kind of what's drawn me to do what I do.

Helga Svendsen 3:04

So I just want to degree it further that so you know, you said you've always been involved. You've always been, you know, in the community. How did that happen?

Tammy Atkins 3:12

For me, it's just growing up in the middle of nowhere, but I grew up in a little town about eight and a half hours north of Perth. So a real country community where if you wanted something to happen, somebody had to do it, you couldn't wait for government or you couldn't wait for a grant to come along. That just didn't happen. So I think as a consequence of that, I've always been pretty action oriented. And so I've just always been on committees are always doing something or thinking I'm constructive. Hopefully, it's been constructive. I was on the toy library for a while the local agribusiness forum, Rotary. I love ideas and creating things. And I've even I mean, that's what I've built my consulting business around helping people transform their ideas into projects. I love that big

picture thinking that strategy, how things work and out in the regions, especially I think we can do the most with what we've got. But how do we maximise what we've gotten maximise that government investments, especially for jobs and regional growth. And, you know, that could be through procurement. And it could be through committee leadership and through really smart thinking. And that's why boards have always really appealed to me.

Helga Svendsen 4:25

And it's interesting, actually, now that I'm going to segue to our topic, because if I think about the digital savvy director, and what that means, you know, I reflect that the last couple of years, it would be great if we hadn't have had a pandemic that got us all more digital savvy, but it was the pandemic that has got many of us more digital savvy, in terms of even meeting like we are today on video conference. And I think that that has really also opened up the way some boards work as well. You know, regional boards might have people from the city city boards might have people from the regions more from interstate from eight hours north of Perth, whatever it may be. So it's partly about board papers and partly about the way boards operate is really opening up as well in a really constructive, fabulous way, I think. So, digital savvy director, you answered the call, I had been asked by somebody in the Take on Board community to have some conversations on the podcast about being digital savvy. So as I am want to do, I put a call out on on both LinkedIn and Facebook to the community and said, right, who's up for a conversation about this? And Tammy, you answered the call. So digital savvy, where should we start?

Tammy Atkins 5:35

I think she'd have already kicked us off really nicely. I'm not sure if I'm digitally savvy board director or just a board director in 2023. Certainly, when I joined Golden Valley Water in mid 2001, our board didn't meet in person for more than 12 months. So we were doing everything that a board does, but we were having to do it online. So that really did exacerbate that learning process. But going back to if I think back to my first government board role, and that was 2011. And I've had the wonderful opportunity to serve in a catchment management authority. And 2011, we just started using iPads to avoid posting out papers to directors. But that said, we were still printing a lot of materials. And I recall these massive lever arch folders of induction materials and plans and strategies, lots and lots of paper. That was the starting point, I think of really going online properly. And since then, I've really embraced the digital transformation in that board governance sense. And that transition from traditional paper to advanced board management software, where we now have a papers and all of the other things that come with that board management software. It's just opened up a whole new world. And I currently get to use Diligent and onboard as platforms. And there's a whole swag of platforms out there. But they offer you voting documents storage along with the E papers. So you can RSVP for your meetings, your agenda templates become your minute templates, there's annotations, there's messaging platforms, there's so many different ways, it just transforms how your board operates, how your organisation operates. It's, it's a really interesting and I find fun way to operate.

Helga Svendsen 7:28

I'm on a couple of government boards, we use Diligent, we only use them for papers. We don't use those other functions that you're talking about. And I'm wondering, there's probably people listening who use different platforms. And I'm guessing as you say, their platforms are all a bit same same sorry, providers of platforms. I know you all think you're special, but I'm guessing they're all a bit same same, but feel free folks out in the community to tell me I'm wrong on that. Yeah, it sounds like you're using full functionality. Whereas for example, the boards that I'm on, are just using it for papers, talk me through some of the other functions and how they work in practice.

Tammy Atkins 8:03

Well, I guess with these platforms, you get what you pay for, and the level of service and the level of, I guess, performance you want you pay for. So the more you need, the more it costs. And you've got to weigh that up with the accessibility of the efficiency and the timeliness that you're getting in return for using these platforms. But certainly, for one of my boards, I RSVP via the platform. And I can see who's attending remotely who's attending in person who's not able to attend, there's a messaging function that comes with one of them. So you could actually have a conversation separately that might be relevant to the meeting papers, or it might just be about board goings on. It's a board management software solution that's available more so than just the papers. But that said the move to a papers itself is spectacular. And the director benefits are huge. There's the accessibility, we can access our papers, as you appreciate from anywhere at any time on a whole range of devices. There's the efficiency, we're not having to sort through or sift through stacks of paper, I still have far too many post it notes all over my desk. But at least I don't have lots and lots of notebooks anymore. And the search functionality is really great. So you can be in a meeting and suddenly think, Oh, does this connect with our corporate plan and you can pull up the corporate plan quickly check, you can pull up all of your board documents within the board management software and quickly check that without having to, you know, stop, step out requested document etc. And I think what really makes a difference is the timeliness of it the real time updates that you can have so that you've always got up to date papers that well you've always got the latest version of documents, and everyone's getting those documents at the same time as well. And of course you're not chopping down as many trees you know, printing out as much paper as well.

Helga Svendsen 10:00

Oh, got it again, heaps to dive into there. Although I just just on that final one about chopping down the trees and printing out the paper and having to shred them at the end, years ago, my first board, all paper based because it was years and years ago, when I finished on that board, it took me months to shred all of the papers. So now just having it like, you're off the diligent app and all your papers are gone. Yeah, it makes life a lot easier at that end of the game as well. In the notes that you'd provided prior, it was interesting when you talked about the search function, because again, I'm a little embarrassed to note, I have never used the search function. And I'm like, ah, yes, exactly. Folks, Tammy is in front of me just going what? I know, how could that be? And I'm hoping people

are listening to this as well. Look, look, I'm hoping people are possibly smarter and more savvy than I am and have all used it and going of course, Helga. What are you thinking? But for those that haven't? Amazing? Like, I've never used it to search the papers, let alone other documents, derr! What was I thinking? So give us an example of where you've used it, where it's been really handy for you and how you've done it.

Tammy Atkins 11:11

All the search functions? Fantastic. Yes. Just trying to think of, I use it all the time. And it might be somewhere in the papers, you've remembered that you had a question about something technical, and you can't quite remember in what paper it was about. So but you could remember it was with relations to a grant, or it might have been a funding program. And so you can just search based on the name of the funding program or the word funding. And rather than scroll through hundreds, and because sometimes our blood packs are really quite big. Rather than scroll through hundreds of papers, it'll pull up every instance where that was mentioned, it is just the easiest, easiest way to operate.

Helga Svendsen 11:57

Oh right, stupid questions. Is it just if you're searching, is it just in that board pack? I don't know about you. But sometimes I'm like, hang on, I think we've talked about this in a previous meeting. And I have to try and remember which meeting? Will it search? Can I search within the whole platform?

Tammy Atkins 12:12

It depends on your platform. And it depends how you're set up. But yes, absolutely.

Helga Svendsen 12:17

Oh, I'm going to test it today. As soon as we're off this, that is mind blown already. I can't believe I've never thought of that.

Tammy Atkins 12:27

And so hopefully, when you're using your papers, you're using multiple platforms at the same time when you're doing a reading. Yes?

Helga Svendsen 12:34

Not sure. Hang on. What do you mean, I get I'm on the iPad, and I'm reading the papers there.

Tammy Atkins 12:38

I'll give you an example of how I operate perhaps so...

Helga Svendsen 12:41

Oh, God, I'm feeling so stupid in this, this is wonderful. Go on. Yes, I'm learning.

Tammy Atkins 12:46

I'm an Apple user. So I access my papers, primarily on my desktop computer and my iPad, occasionally, but not that often on my iPhone as well. I'll get the notification that there's a board pack or a new document. And I'll usually then read that document at my desk on the big screen on my desktop. But I'll simultaneously have it open on my iPad, and I'll annotate with Apple pencil into the iPad version. And we're probably getting into a little bit too much detail here. But for general note taking, I'll then have a split screen and I'll use my one note app as well. So that I've got the separate notes, and I've got my annotations on my board pack. And that way when I go to the board meeting, I only need to take my iPad with me.

Helga Svendsen 13:34

I just do it all on the iPad, I read them on the iPad, I make my notes on the iPad, and then God I feel so old school, I actually still have pen and paper for those things I want to raise in the meeting. And I have that next meet. So I have the iPad for all of my notes. And my pen and paper version will say you know topic, this page this, ask that so it's just a couple of pages of my prompts, basically, that I don't do in OneNote I do on old fashioned pen and paper.

Tammy Atkins 14:00

And in the your board document you could have certainly be bookmarking those questions. And yeah, absolutely. I used to print out an agenda. But the more I use the system, the less I need to do that. So I'd only print out an agenda now if I were chairing a meeting, or if there was some specific reason why I needed that bit of paper. And with finance reports because I do find myself slipping backwards and forwards from one page to another or looking at previous month's reports. Being able to have software open simultaneously on multiple devices tends to address that I'll have the main document, open up on my desktop and flip from page to page looking on my iPad.

Helga Svendsen 14:39

So the finance papers are the ones I struggle with the most on my iPad that Okay, my next round of board papers I'm doing I'm going to message you Tammy because I'm gonna sit in front of my beautiful big screen on my computer with my iPad and do them together. Although that means I'm sitting in a much less comfy chair than I normally read my board papers but I will just have to run with that and see how that goes.

Tammy Atkins 15:02

But you'll be sitting there for much less time because you'll be much more efficient and effective when you're reading your papers.

Helga Svendsen 15:09

This is brilliant. I honestly didn't think I was this hopeless at being digital savvy, but you are teaching me so much. It's brilliant. Actually, I'm interested to know how you coped with the transition to digital papers. What's your advice to me in switching your brain from and your hands from doing those papers on paper to doing it in the digital world.

Tammy Atkins 15:34

I'll take advantage of all the training that's out there, whichever platform you're using will have training available, and do the training programs and do the webinars because you don't know anything until you learn it. And it doesn't take that long to learn. And you'll just jump on this so quickly, because it makes your meetings easier, your meeting prep easier. I love that I can just turn up with my iPad, rather than all these scraps of paper and my desk. Yes, it's full of post it notes. But it's not full of separate notepads anymore, much more efficient about how I'm operating. And I've got all my notes on me at any one time, because I've usually got my iPad or my phone on me.

Helga Svendsen 16:18

It is magnificent for that I, again, on all of the boards I'm on, there's usually at least one person who still has the folder of printed notes. And I think of some poor EA, who's probably had to print them out for them. And just lugging that around it is a hefty folder of stuff.

Tammy Atkins 16:37

It's interesting, you mentioned that because looking at it from a cybersecurity angle as well, there are some really solid reasons to consider the move to digital board papers. First up, there's the

improved security that comes with the Cloud Storage. And then there's the control aspect. So whoever manages your your system can set up who gets to do what, who gets to see what, who can change things, who could share documents, certainly one of my boards, we're not allowed to print papers, and our papers have a watermark with their name on top there so that it should we screenshot them, or take a photo of our page, it's clearly you can see where it came from. And this tight access control really helps make sure that only the right people are getting their hands on the important stuff. You can track things. And that's a big plus, with the tracking features, you can say who looked at a document when they did that. And it makes everyone really accountable for what they're doing.

Helga Svendsen 17:30

That cyber safety aspect. And particularly when you were talking before about messaging within the app, I mean, I know lots of different board directors groups that leave their email, stuff around whether it's conversations, or some will have a WhatsApp group or a Signal group or something similar. Presumably doing it all in app is a million times more secure and traceable and trackable. Rather than accidentally sending your family group something confidential from the board that you're on. By tapping the wrong WhatsApp group by mistake.

Tammy Atkins 18:03

Mistakes can happen so easily can't they.

Helga Svendsen 18:06

Okay, the boards that you're on, you know, on that messaging side of things, do they use the messaging function? For some of that chit chat out? Not that the chit chats not important? In fact, it is important and sometimes it's a more informal way of asking some questions. Is it used in that way? How is it used?

Tammy Atkins 18:25

Look not really the boards I'm on there's a lot more communication, because we're still meeting quite often. And we make between board meetings, we have those deep dives, we have those committee meetings there. So there's a lot, lot of interaction going on. We haven't really needed to have that conversation. But everyone has certainly had the training and knows how to use it and has it set up correctly on their devices. So it is an option. But we've we've just not needed to take it out.

Helga Svendsen 18:52

You know, as I say, I wonder about those other groups, WhatsApp group, Signal groups, and so on and using it in that way.

Tammy Atkins 18:58

Well, I think also, it's worth considering that when you're using a professional platform with a really good reputation, especially one with ISO certification, you know, it's got those rigorous security approaches, you know, it has a help desk, you're really giving yourself the best shot at keeping your documents and your conversations secure. If you've already got a board management system, you should perhaps look at using its messaging service if you're not already, rather than using those offline systems.

Helga Svendsen 19:25

I use Diligent and I use it for all of my boards, but we use it as board packs. Actually one thing I will say for those that also use Diligent and maybe it's the same in the others. It took me again, maybe I'm a bit slow at this stuff, but I had three boards on Diligent and it took a while for me to work out you could join those boards together. So you only needed one login rather than your three different logins and your three passwords because no one tells you this. So I kept getting logged out because I was using the wrong password for the wrong board. I chopped between one and the other end get booted off. I felt like I was on a first name basis with Diligence support. But yeah, so if you're if you're on multiple boards, and you're using whatever platform, join them together, one password, oh my god, life changing for not getting locked out of your board papers.

Tammy Atkins 20:15

And call the help desk because that's what they're there for. And I'll take you through this.

Helga Svendsen 20:19

What should I have asked you that I haven't?

Tammy Atkins 20:22

Well, I think we need to look at this, the board management software from the three perspectives of the directors benefits, the benefits to the organisation, and then the cyber benefits as well.

So from the director benefits, there's the accessibility, the efficiency, the timeliness that we talked about. And then eco friendly, we're not using as much paper as we used to do. From the organisation's perspective or management's perspective, it's, it's cost effective, because they're not printing and posting and storing as much information as they used to. The updates are easier, they can update a document and all directors can have it updated in their system instantaneously. There's those engagement tools, depending on whether you choose to use them or not, or depending on whether you subscribe to them or not. And I think there's also a reduction in the preparation time, because once you've done the documents, you can upload them they instantly become PDFs, that instantly in the cloud, they're instantly on everyone's devices, no matter what device your board directors choose to use, you know, it's their personal preference as to what they might like to use. They using them in a device that works well for them. So there's that time saving there as well. So there's several strong reasons to consider the shift to digital board papers if you're not doing it already.

And then from a cybersecurity perspective, there's that enhanced security, so long as you're going with a company with a really good reputation, and there's a whole handful of them out there. There's the access control. So should you leave that board, IT administrators can remove your permission to all of the documents, they can also control who can view, edit, share all of those functionalities, there's the audit trail so you can see who accessed what and when. So that, that added accountability. And of course, there's the data backup. So there's that data integrity and availability, even if there's a disaster, odds are you're going to still be able to access your documents online. And if I can just say also, I live out in regional Victoria and this spotty mobile coverage and a lot of places I go I do a lot of my reading while I'm waiting for my daughter to finish her sports after school. And I can still access all of my documents offline without any trouble whatsoever. It doesn't matter if I'm in Moyhu or Beechworth I can still do all my board work.

Helga Svendsen 22:43

So you've touched on being in regional Victoria and I know from before we started this conversation, you have excellent internet, where you are better than I do in downtown Thornbury. What about those that aren't in places where it's so fabulous? Does this all work for them? Whether it's in regional Victoria regional Australia, or indeed downtown Thornbury? If the internet is not so strong? How can we work around that for access to all of these things?

Tammy Atkins 23:12

Again, it depends on the board management software that you choose to go with. But certainly the two platforms that I work with work offline, once your computer has been online and has downloaded the papers, you've got access to them offline. So I could be working on my board papers at home and then drive somewhere where there is no internet access, open up my device and continue working.

Helga Svendsen 23:36

And you could just let them even if your internet slow, just let them download slowly, overnight. Next morning, everything's there and all of your different platforms here. Nice, lovely, our Tammy, this has been magnificent, hopefully, for everyone listening definitely for me. And as many know, you know, I created this podcast because I was looking for something like this myself couldn't find it. So I thought I better create it for myself. So this has been absolutely magnificent for me. What are the key things you want people to take away from the conversation that we've had today?

Tammy Atkins 24:08

Well, I'd like to talk a little bit further about board papers, if you don't mind. I've had the privilege to work with a number of leaders and board chairs and board directors and one of which has a great saying of 'give us papers that make us think not read'. And so if you can give board directors concise and impactful documents that encourage us to think deeply rather than spending time reading through LinkedIn materials, or having trouble downloading documents, so we can access documents, so we can't find the right documents, make it really easy for us, then you're going to get the best from the board. And so board papers that can spark thoughtful discussions and that critical analysis. They need to be brief and they need to prompt us to engage, ask questions and leave that room for strategic conversations, rather than getting us lost and bogged down. into the detail. So give us papers that make us think not read. And one of the great ways to do that is to look at electronic papers and board management software, because it's gonna save us time. It's efficient, and it's effective. And it means that we're going to have easy and simple access to our board papers. So we've got more of that time to be strategic.

Helga Svendsen 25:20

Love it... think not read. It reminds me of that saying, I'm not even sure who said it. But I didn't have time to write your short letter. So I wrote you a long letter instead? And is there a resource you would like to share with the Take on Board community?

Tammy Atkins 25:35

Look, there's not one in particular, other than the help desks of all of the board management software, there's, there's a whole swag of software to look at. And don't make the mistake of just using it and not accessing the help desk and all of the webinars and all of the resources that are online and the YouTube clips, because as they say, there's no such thing as a silly question. If you've got that question, or you can't work something out, odds are not only as somebody already asked that question, but they've done a YouTube clip on it answering your question.

Helga Svendsen 26:06

Lovely Tammy. Thank you. Like I say this has been a magnificent lesson for me. I've got definitely more tips. So thank you so much. And thank you. I think it was Susan Benedyka, who recommended you thank you, Susan, you are right on the money in terms of Tammy's tips. Thanks for sharing with me and thank you for sharing with the Take on Board community today.

Tammy Atkins 26:27

It's been a privilege. Thank you very much.

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