

# Charlbury Town Council

## Internal Communications Update

**Dated 30/08/2022**

### 1 Introduction

Good internal communication within the town council and associated working groups is essential if it is to operate effectively and achieve its objectives. The chosen IT platform (Basecamp in our case) is an important enabler but it is only a tool and its deployment alone is not sufficient to ensure effective communication. In addition:

- a. We need an operational PROTOCOL to ensure that Basecamp and other communications channels are used consistently and appropriately;
- b. Basecamp must be configured to reflect and support the council structure and method of operation. We also need to make use of important Basecamp features that we have largely ignored until now (e.g. schedules and to-do lists).
- c. All concerned (councillors, working group members and the clerk) must understand and accept the protocol. They must also adhere to it!!

In recent weeks, Gary has been working on the Basecamp configuration ((b) above), concentrating initially on the core Council operation but there is much more to do. In particular, once we have an agreed structure for the Town Council (HQ in Basecamp), this needs to be rolled out as appropriate to the working groups. We also know that the structure must and will evolve over time so a review process needs to be part of the protocol. Many thanks Gary for your hard work so far.

This update note aims to:

- Outline why we need a protocol;
- Summarise the key elements of the proposed protocol indicating how these map onto the Basecamp configuration;
- Invite comment and suggestions.

### 2 Why we need a protocol

To support the increased breadth and depth of activity undertaken by the council we now communicate with each other in a variety of different ways and the deployment of Basecamp has been a real help in this respect. Unfortunately there is currently no consistency in the way we use Basecamp, email or other means of communication and this has led to a number of issues. For example:

- Too many places to look for information meaning some messages are missed;
- Not being able to find documents or messages due to a lack of structure or consistency of naming;
- Being bombarded by a plethora of emails that may or may not be relevant; resulting in wasted time and/or ignoring important information.

The main aim of the protocol is to avoid these issues by introducing simple structures and standards that everyone can understand and then all adhering to them!

### 3 Basecamp and the Protocol

Basecamp is the council's chosen IT platform for internal council communication and the platform is being configured to reflect the protocol. Basecamp supports many relevant features that we don't currently use much, if at all. Features such as schedules, to-do lists will be exploited in the future to assist in project and task management as well as avoiding meeting clashes etc.

Where we are already using features of Basecamp extensively, there is often little or no consistency in the way that they are used. The protocol attempts to address this and, where possible, Basecamp is being reconfigured to reflect identified structures and ways of working. A key aspect of the protocol relates to the management and access to documents through the implementation of a Document Repository Structure which is covered in much more detail in section 4 of this note.

### 4 Elements of the Protocol

#### 4.1 *Messaging and Communication*

The Basecamp Message Board will be the standard method of communication between councillors, the clerk and other working group members. Email should NOT be used for internal communications unless unavoidable. General communication by email can cause inboxes to be inundated by unwanted emails and risks important messages being lost or overlooked. The message board automatically includes chains of discussion and provides easy access to any who may wish to refer to them without the need for individuals to keep or archive email chains individually.

If you want someone specific to respond to a message on the Message Board, reference them within your message using the "@name" convention to force notification.

If you need to contact a person individually, use the Ping functionality.

#### 4.2 *Reflecting the Council Structure and Operation*

The Basecamp and Document Repository structures need to reflect the structure and operation of the council including its working groups and committees. The Working Groups are already reflected in the current Basecamp structure as "Teams" but this approach should be expanded to include the standing committees of the council (i.e. Finance, Planning, Allotments, Traffic, Personnel and Awards) and to encompass the document repository.

This separation will make it easier for individuals to focus on documents and information that is of immediate relevance to them. See section 4 for more details on the Document Repository.

In Basecamp, the Town Council appears as "HQ" and this distinction is important as not all information available to councillors and the clerk can be shared with non-councillor working group members. In addition to the HQ, the Basecamp configuration includes the following teams:

- **Land and Nature Group**
- **Journeys Group**

- **Energy Group**
- **Food Group**
- **Buildings Group**
- **Communications Group**
- **Planning Committee**
- **Finance Committee**
- **Traffic Committee**
- **Allotments Committee**
- **Personnel Committee**
- **Awards Panel**

### 4.3 *Document Repository*

All documents used by the council or working groups should be held in a repository accessible to all members (subject to access restrictions if necessary). This repository will be located in cloud-based storage and be accessed via Basecamp “folders” defined using the “Docs & Files” functionality.

Initially the intention is to use cloud space provided by Basecamp but, if appropriate, an alternative allocation can be purchased and used (e.g. Google drive) and referenced in Basecamp.

#### 4.3.1 **Repository Structure**

Within the Basecamp HQ and each Team, separate “document” folders will be created to reflect the current usage and/or status of documents as explained below. Other folders may be created if required and the requirements of individual teams may vary.

- **Working Documents** – live documents that members are working and/or collaborating on. These will typically be in an editable format such as MS office or Googledoc and access may be restricted to members of the appropriate team.
- **Finalised Documents** – When documents are finalised, they will be converted into a non-amendable format such as PDF and placed in a separate folder. Typically read-only access will be granted for these documents to all council members and working group members as appropriate. Responsibility for maintenance of each team’s Finalised Documents folder will be vested in an identified administrator and in the case of the main Town Council HQ, this will be the town clerk. This control is important to ensure orderly curation of finalised documentation. “Source” versions of each finalised document will be held separately by the administrator to enable it to be used if necessary as the base for any future formal document revision. Many Finalised Documents will be placed in the public domain in which case the town clerk will make them publicly available via the Town Council website.
- **Governance Documents** (within the Town Council HQ section only). Agreed governance documents (e.g. code of conduct, terms of reference and agreed budgets) should be held in a separate folder or folders. Although these are examples of “Finalised Documents”, they are so fundamental to council operation that they should be clearly identified as such.
- **Meeting Papers** – a separate folder to hold agendas, minutes and other meeting papers for each meeting, particularly for meetings open to the public. Within this folder, a separate

sub-folder should be created for each meeting and these sub-folders should be named according to naming standards (see \$).

- **Information** – documents of relevance to councillors and/or working group members which have not been created by the council and are held for information only. For example this may include local and national planning documents, government white papers and newsletters from other bodies.
- **Archive** – to hold material that is no longer current but which needs to be retained from previous years. Separation of archive material will avoid the current document folders from becoming cluttered

#### 4.3.2 Access Permissions

- **Finalised Documents, Meeting Papers and Governance Documents** – Read-only access should be available to all council and working group members except in exceptional circumstances. Update access should only be available to the administrator and deputy. Linked folders may be required to make documents visible outside the home group (e.g. within other Basecamp teams).
- **Working Documents** – full access should be available to members of the appropriate team only. Each document should have a clearly defined “owner” who should take charge of all modifications to the document and who should include their initials within the document filename. Other team members may comment or add tracked changes but the owner must be responsible for accepting or rejecting them. The owner is also responsible for passing finalised versions to the administrator for inclusion in the Finalised Documents folder.

#### 4.3.3 Naming Standards

To assist in finding and identifying documents, some simple naming rules should be followed, especially for Finalised Documents. The most important aspect of this is the inclusion of a date within all document filenames using the standard 6-digit reverse (or ISO) date format. This format takes the form “yymmdd” with no spaces so that, for example, 23<sup>rd</sup> July 2022 would be written as “220723”. The use of this standardised format ensures that documents within a folder always appear in chronological order and are therefore much easier to locate, especially as the number of documents build up.

For meeting papers, this same date format standard should be used based on the meeting date, for naming sub-folders, agendas, minutes etc.

Whilst no further specific naming standards are imposed, the administrator should adopt the same naming convention for documents of the same type (e.g. “220831 Agenda Full Council” for the agenda for a full council meeting held on 31<sup>st</sup> August 2022).

#### 4.3.4 Document Search

It is important for effective search facilities to be available to enable documents to be located based on keywords or content.

## ***4.4 Use of Other Basecamp Facilities***

### **4.4.1 Basecamp Schedule**

All meetings and other important events should be recorded using the Basecamp schedule. This will help to avoid clashes and make it easier for everyone to schedule their council time. You can subscribe to your Basecamp schedule from Google Calendar, Apple Calendar or MS Outlook to view your council scheduled alongside other commitments.

### **4.4.2 Project Management**

Basecamp supports simple project management that should be sufficient for our requirements. Specific projects can be set up within the HQ or any team with members invited as required. In addition to the Basecamp Schedule, the main tool provided is To Do lists. These allow tasks to be defined, assigned to one or more individuals with due dates, and then progressed. This feature should be used whenever appropriate to ensure timely progression of projects.