



From Today to Future-Ready

How to Advance State, Local and Education Digitalization and Data Accessibility Efforts

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WHITE PAPER

FROM TODAY TO FUTURE-READY

HOW TO ADVANCE STATE, LOCAL AND
EDUCATION DIGITALIZATION AND
DATA ACCESSIBILITY EFFORTS

LET'S BE HONEST...

Most state, local and education organizations have miles to go on their digitalization and data accessibility journey. According to Gartner, most government CIOs are exploring or deploying digital services to citizens and other stakeholders, yet they face challenges in terms of organizational silos, insufficient funding and risk-averse cultures.

The COVID-19 pandemic accelerated some digitalization and data accessibility programs in the public sector and education markets. State, local and education organizations were forced to provide remote work and learning opportunities, at the same time establishing digital-first programs to better serve constituents.

As the pandemic eases, digitalization will continue, suggests a recent survey¹ by Forrester Consulting and commissioned by Adobe.

Among U.S. decision-makers across federal, state and local agencies



TWO-THIRDS

of respondents said accelerated digitalization would continue and have applied for or plan to apply for government funding that would further support these efforts.

5 Major Challenges

The Gartner report found that government CIOs must overcome five major challenges in order to scale digital solutions across their organizations:



Organizational
Silos



Risk-Averse
Cultures



Insufficient
Funding



Digital Skills
Gaps



Lack of IT
Business Resources

This whitepaper provides a roadmap for success.

¹ Forrester

DIGITALIZATION AND DATA ACCESSIBILITY: WHAT IS IT & WHY IS IT SO IMPORTANT?

Digitalization and data accessibility encompasses any initiative that uses technology to improve resiliency, performance and service.

Today's tech-savvy and digitally native citizens expect immediate engagement with state and local government agencies, as well as schools and universities. Gartner takes that a step further in its "[Top 10 Government Technology Trends for 2022](#)" report, predicting that "by 2023, most governments without a total experience (TX) strategy will fail to successfully transform government services. TX offers governments a way to improve talent management strategies and develop stronger digital skill sets across their organizations, while improving service delivery to citizens. The lack of a TX strategy can increase service friction, leading to risk of service delays and underwhelming service experiences," the report adds.



By 2023...

most governments without a total experience (TX) strategy will fail to successfully transform government services.

Before considering TX, state, local and education organizations must start with constituent experience (CX) (aka customer/consumer/citizen experience). Upgrading their core operational processes to provide constituents with the service they have come to expect should be step one. Not every vertical market has the same digitalization needs, yet the result is the same: streamlined access to information, more efficient processes, enhanced security and cost savings. For state, local and education organizations, the goal—and results—are no different.

A PUBLIC SECTOR POINT OF VIEW

State, local and education organizations are seeking improved operational efficiencies and more advanced digital services for constituents. They're also focused on ensuring business continuity and resiliency when disruptive events like the pandemic occur. Digitizing information ensures that it can be accessed electronically over long periods of shut down.

Organizations are adopting solutions that promise to increase agility, efficiency, effectiveness and security. Yet as the number and complexity of digital solutions expands, organizations must modernize and integrate emerging technologies and systems in ways that support secure and flexible work environments.

In the [2022 Public Sector Identity Index²](#), conducted by AuthO and Market Connections, the vast majority of government entities surveyed indicated they are considering the expansion of digital services in the next two years. With these expanded service offerings, organizations will be held accountable for the security of constituent data, the volume of which is expected to grow rapidly. As a result, government agencies and education organizations consider the protection of citizen's privacy and data as one of their most critically important priorities.

A [2021 Deloitte survey³](#) titled "Improving Trust in State and Local Government" revealed that individuals who are pleased with a state government's digital services tend to rate the state highly in measures of overall trust. Citizens had a very positive view of state agencies that have digital services that are easy to use; web-based services that meet citizens' needs; and security measures that keep citizens' data safe.

Digital services that are inadequate or difficult to use lower citizens' trust in state government agencies. These results suggest a reasonable correlation between citizens' digital experiences and their general confidence in the government.

At every level of government, agencies must "use technology to modernize and implement services that are simple to use, accessible, equitable, protective, transparent and responsive," according to the Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government, which was issued in December.

Citizens and students alike expect an Amazon-like experience when interacting with government and education institutions. Erik Avakian, former chief information security officer for Pennsylvania, encourages colleagues to "think about how citizens access their favorite retail website. They can go to different areas of the site and buy what they need with one unified credential."



In the higher education arena...

EDUCAUSE's "2022 Top 10 IT Issues" report looks at the technology needed to deliver on students' expectations.

#1 Issue



Cybersecurity

#2 Issue



Accelerating Digital Transformation

The Pace of Digital Transformation

13%

Actively Engaged

32%

Developing a Strategy

38%

Exploring

The proliferation of digital capabilities and the large amount of data held by public agencies creates risk for state, local and education organizations. Constituent data held by agencies includes personally identifiable information (PII), such as Social Security numbers (SSNs), driver's license information, tax return data, health and school records – attractive targets for criminals seeking to profit from stolen data.

Every good digital initiative baseline starts with modernizing an organization's data and information management systems. Only when everyday workflows streamline and reduce manual and paper-based processes can digital transformation and acceleration emerge in a safe and reliable way.

Organizations that do not convert to digital workflows risk lagging behind and facing a dissatisfied constituent base. Do you have a digitalization and data accessibility plan in place?

² 2022 Public Sector Identity Index

³ Deloitte

HOW TO DIGITALLY TRANSFORM YOUR ORGANIZATION

Most records today are “born digital,” but if you look at state and local government agencies, as well as education institutions, paper records are still prevalent and may always be required for certain purposes depending on retention requirements, and in some cases due to historical significance.

It’s important to seek balance between the physical and digital files organizations keep. Any unnecessary use of paper results in a hybrid physical-and-digital information landscape that can be difficult to manage. It duplicates efforts and increases risk to often-sensitive citizen data and intellectual property.

Loss of critical data and information continues to draw the attention of state, local and education organizations. Among other consequences, data loss erodes constituents’ trust. NASCIO’s latest annual [State CIO Top 10 Priorities](#)⁴ ranks “Cybersecurity and Risk Management” as the top concern of 2022. Similarly, EDUCAUSE listed “developing processes and controls, institutional infrastructure, and institutional workforce skills to protect and secure data and supply-chain integrity” as its [number-one IT issue for 2022](#)⁵.

THE DIGITAL TRANSFORMATION PROCESS

Having a solid digital transformation guide is key to modernizing data and information management processes while accelerating digitalization, data accessibility, and security.



⁴ State CIO Top 10 Priorities

⁵ Number-one IT issue for 2022



IDENTIFY

Determine What Should be Retained, Defensibly Destroyed, or Digitized

Legacy records cleanup is an essential step for any government agency or educational institution's digitalization and data accessibility journey. It's difficult to make sound decisions if you don't know what you have in your records and information inventory. A well organized and culled inventory is a critical first step to a digitally transformed organization. With a well-organized inventory, you can make the right decisions about what records to retain, defensibly destroy, or digitize.

If you don't need it, destroy it. Organizations should have retention schedules in place based on legal, regulatory, and operational requirements (for their specific location) to inform decision-making. Records that have met compliance obligations based on these rules can be defensibly destroyed.

While the notion of keeping everything may be tempting, it's also potentially damaging:

Increased cost > Storing records that have met their compliance retention requirements only adds to your organization's information.

Compliance risk > Certain regulations require destruction once records have met their retention requirement.

Lost productivity > The **average employee** spends 25% of their week filing, copying, indexing or retrieving paper records.

Security risk > Unmanaged records that include PII add a risk of being lost or stolen.



DIGITIZE

Go Paper-Free or Paper-Light

Paper documents that remain fundamental to operations should be converted into digital format to enable easier access and deeper analysis. But not everything needs to be digitized. It's important to earmark those records that either need to remain in paper format or can be destroyed during the identification step. This will allow you to focus on only those records you need to digitize.

By digitizing records, your team can securely access data anywhere, identify, extract, and understand insights across departments, streamline workflows, and respond quickly with informed decisions to improve citizen and employee experience.

When it comes to digitizing, you have options:

Entire Backlog > This route puts you in the fast lane for digitalization, but it's a labor-intensive process and not always necessary. Start by categorizing your files by priority into smaller conversion projects, which is known as Backfile Conversion.

Imaging As Needed > Digitizing records as they are needed reduces the upfront burden of fully going digital, but you risk not having a digital copy immediately available.

Day Forward and Digital Mailroom > Typically used in conjunction with Backfile Conversion or imaging as needed options, this path allows for digitizing, indexing and conversion of new incoming documents.



STORE

Access Digitized Information from a Secure, Future-Ready Repository

As you continue your digitalization and data accessibility journey, it can be difficult to manage all aspects. It may seem as though your team can successfully maintain a hybrid environment of paper and digital.

However, storing information digitally in a centralized cloud-based repository enables employees to access and more effectively manage stored data. This is why the [NASCIO 2021 State CIO Survey](#) indicates that 49 percent of respondents said they have a cloud smart strategy in place to migrate legacy applications to the cloud.

The shift to advanced digital storage technologies has been shown to:

- › Ensure compliance and reduce risk
- › Protect against data loss and cyber threats
- › Accelerate innovation
- › Streamline workflows
- › Respond to audits or FOIA requests
- › Make data accessible for analytics

	 PROS	CONS 
On-Premises	› No third-party involvement › No offsite data transfers › Reduced risk of downtime	› Significant infrastructure investment › Requires additional staff › Reduced data resiliency
Colocated Data Centers (offsite)	› Lower total cost vs. private data center › Rapid scalability › Strong data security and resiliency	› Data must be transferred by third party › Potential risk of downtime
In The Cloud	› Flexibility › Scalability › Reliability › Access virtually anywhere	› Complex vetting process - not all cloud services are created equally › Services may emphasize security, volume, access, and scalability differently



AUTOMATE

Enable Collaboration and Workflow Automation for Document-Centric Processes

Now that you've organized and made decisions about your information, it's time to automate manual processes that consume a significant portion of your employees' valuable time. This is especially relevant to the parts of the organization that manage numerous records.

Take Accounts Payable (AP) as an example of a common document-centric process found across nearly all organizations. Supplier invoices typically arrive at multiple locations, in multiple formats (paper and digital), layouts and languages, and are transmitted one by one as email attachments to the centralized AP team for invoice and purchase order matching and approvals. This manual, paper-intensive process is often inefficient and results in late payments to suppliers.

To streamline a manual process, we suggest a combination of digitization and leveraging modern technology like artificial intelligence (AI) and machine learning (ML). This helps to create a digital mailroom where you can automatically pull key data out of digitized documents to get the right information to the right person at the right step in your process. It's important the platform you choose can integrate with relevant systems where users need to access information as part of your process.

Automating habitual administrative tasks eliminates bottlenecks, making your organization faster, leaner and more agile. It also frees up your employees' time to focus on strategic, high-value, mission-oriented initiatives, rather than being inundated with resource-heavy tasks that have less impact for your organization.

For any state and local agency or educational institution, breakdowns in records and information management force employees to waste time chasing down solutions to avoidable problems, preventing your organization from becoming faster, more efficient and adaptable.



UNLOCK

View and Interpret Key Data to Identify Patterns and Trends

This is the final step in your organization's digitalization and data accessibility program. After you've identified what to keep, digitized what you need, defined where to store it, and begun to automate manual processes, it's time to gain a better understanding of your data. Getting this far in the process enables you to start taking advantage of data insights to uncover true value.

AI and ML capabilities allow you to classify and extract data so your team can search and analyze information across multiple repositories. By aggregating and visually connecting this data through dashboards on one platform, you'll gain powerful insights to make more informed, data-driven decisions. With these advanced analytics, identifying patterns and trends becomes a simple task to help you better understand your organization's data landscape.

MODERNIZE YOUR ENVIRONMENT

Going digital and incorporating new technologies positively impacts organizations of all sizes, across all states, localities, and educational institutions. It reshapes the employee and constituent experience, to which all organizations need to respond. Therefore, the question isn't whether to pursue a digitalization and data accessibility effort but how to accelerate your transformation.

Through this journey, you'll inventory your entire backlog of paper records and decide what to digitize, store and destroy. You'll automate key workflows and start unlocking insights from your information. You'll be a more productive agency or institution that can rival leading organizations in the private sector in terms of offering a digital-first experience.

By following the five steps provided in this whitepaper, organizations will set themselves on a path that will collectively benefit the citizen/student experience, the efficiency of government and the security/resiliency of data.

We hope this guide sets you on the right path for [effective digitalization and data accessibility](#).

To help you on your journey or simply for expert guidance, Iron Mountain Government Solutions is here to help.

Contact us today.

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ABOUT IRON MOUNTAIN

Iron Mountain Government Solutions, a division of Iron Mountain Incorporated (NYSE: IRM), is a leader in innovative storage and information management services, storing and protecting billions of valued assets, including critical business information, highly sensitive data, and cultural and historical artifacts. We understand the complexities of bridging the gap between a hybrid physical and digital world, with data siloed across organizations. We help public sector agencies digitally transform, while implementing next-generation technologies that generate insights and unlock the value of your information. Our full suite of records and information management solutions improve asset management, reduce physical footprints, decrease costs, and streamline operations, while greatly enhancing citizen experience, and mitigating security and privacy risks. Visit www.ironmountain.com/publicsector to learn more, and follow us on LinkedIn.

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