



## Southwestern College migrates to Diligent Community with immediate impact

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Southwestern Community College District is a public institution of higher education in Southern San Diego County with more than 24,000 students on five campuses and online. A governing board comprised of five elected members and one student member along with 20+ councils and committees ensure the district leads and serves its diverse community of students by providing quality academic programs, student support service and pathways to student success.

Myra Lomahan, Executive Assistant to Superintendent/President & Governing Board, helped to spearhead the district's migration to Diligent Community from BoardDocs in early 2024. Southwestern had been using BoardDocs since 2012 but became an early adopter of Diligent Community. The migration process took approximately 6 months from start to finish. This included data transfer, system setup, user training and testing.

Constituency leaders, administrators and support staff collaborated closely during the transition to Diligent Community to ensure a smooth and impactful migration that would benefit all stakeholders. The district has seen a successful migration with impressive results.

## Better tech for best practices

Making the transition to Diligent Community was an easy decision, though the Southwestern leadership team knew it would not be without some trepidation given how long the district had been using BoardDocs. “Change can be hard, but we realized this change would be well worth the time and effort,” Myra says.

The district decided to migrate to Diligent Community for several reasons. The solution aligned with Southwestern’s district-wide technology upgrades and was much more user-friendly. It also offered a visually aesthetic, modern design that appealed to students, staff and educators, the board, committee and council members, as well as the community at large. A significant feature of Diligent Community, compared to BoardDocs, is that it is accessible from any handheld device. It also significantly reduces the amount of time required to produce meeting agendas for the board, councils and committees.

Myra explains that other Diligent Community features such as notifications, advanced search filters and the enhanced agenda builder with auto-save and one-click print fueled the district’s decision to move to Diligent Community.

“We also realized that even though Diligent Community offers more functions than BoardDocs, we could choose to enable those that would benefit us and give us time to adjust to the new solution. It doesn’t mean that you have to jump in with both feet right away,” she says.

Diligent Community is configured so that certain functions can be turned on or off depending upon your needs and requirements. “This would allow us to get used to the software and determine what

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to get used to the software and determine what features would enhance our effectiveness,” Myra adds.

## The migration and training process

Going into the migration process Myra, a cross-functional Southwestern integration team and end-users — with the help of Diligent Community customer support — addressed three overarching concerns. The first was IT-related. How would the new solution integrate with current campus apps? Would data remain secure throughout the migration? What measures were in place to prevent the loss of critical documents like board agendas, contracts, meeting minutes and approved agreements?

We quickly resolved all these concerns without disruption to any of our day-to-day activities thanks to Diligent Community’s migration team,” Myra says.

A second and common concern was an anticipated resistance to change, particularly with so many years using BoardDocs. Myra adds, “Even for me, as I’ve been using BoardDocs for more than 10 years, change is hard. But you know, it’s like upgrading to a new phone – confusing at first as you learn new features. And then you wonder why you didn’t switch sooner,” she explains.

To ensure users were comfortable with the change and understood the improvements and features with Diligent Community, the Southwestern team collaborated across departments in a coordinated effort and engaged in a road show. They made presentations to the various councils, committees, college administration, academic senate and departments that used BoardDocs. The district's migration team also conducted hands-on training sessions to test demo board agendas, and offered Diligent Live webinars and training videos to all users.

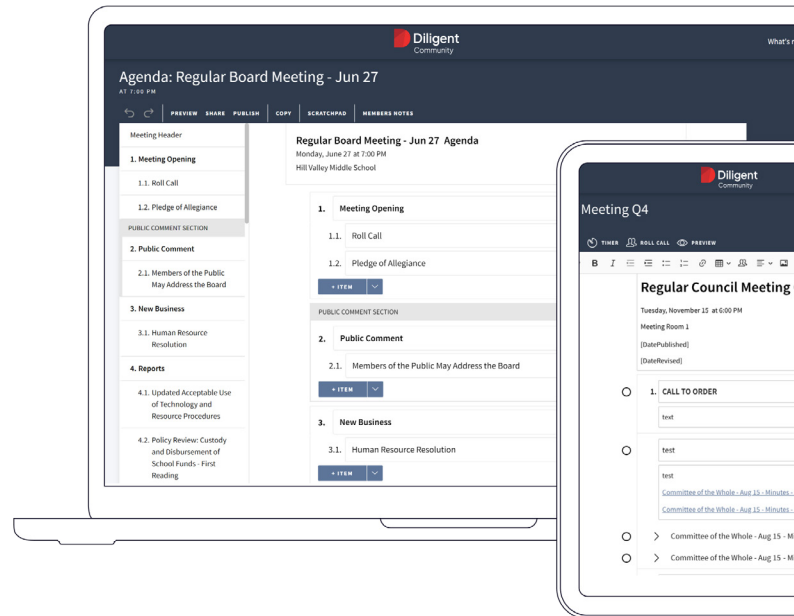
"We worked to overcome user resistance with a transition plan that included these helpful training resources and extensive support from Diligent Community's expert team," Myra says.

The third pressing concern for the college when it came to migration was ongoing support. It turned out not to be a worry in the end. "We've worked very closely with the Diligent Community support team. They are fantastic and very responsive to our feedback, improving the platform to better suit our needs," she adds.

## The results: A smooth integration with many advantages

The migration from BoardDocs to Diligent Community, a team effort, both internally across the college and externally with Diligent, has been successful and the solution is actively used and valued by the district and constituents. "It has made our lives so much easier by speeding up and streamlining processes that with BoardDocs took more time and effort," Myra cited.

Preparing board, council and committee meeting packets before implementing Diligent Community could take an entire day. Myra said, "We previously had a staff member dedicated to manually create



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PDFs and attaching the individual files, an extremely time-consuming process. Depending on the agenda packet, it could take nearly a full day.”

Now, packets often containing thousands of pages of documents, are assembled faster with a one click print feature. “We no longer need to manually input or copy and paste content. Now we simply attach a Word or PowerPoint file and it automatically uploads and saves instantly with the Autosave feature. Another benefit is that we can revise or edit these documents within the platform eliminating the need to downloading the file, make edits and then reattaching the file,” Myra explains.

With Diligent Community, agenda packets are shared seamlessly and viewed easily from mobile devices enhancing collaboration and access. Board members can effortlessly search through the agenda packet and print select pages easily with one-click print. “The automatic bookmark feature is a game-changer as bookmarks help the user navigate to various categories and documents in the agenda packet. This is a huge time-saver for pages numbering in the thousands,” Myra says.

The search function is also a winner, she adds. “We’re able to search by keywords, then filter and sort the results. This helps users find what they need quickly to review or address certain issues.

Diligent Community also improves communication and enhances transparency with the notifications feature. This helps board, council and committee members and the community keep abreast of meetings, decisions and actions impacting the district and its students.

Myra encourages other higher education systems to transition to Diligent Community for greater efficiency, better communications and more collaboration with all constituents.





She has this advice that will make the migration successful and even fun!

- Gather your team and devise a transition plan with timelines and deliverables. Get users on board with demos, presentations and videos.
- Make training a priority using Diligent Community resources.
- Collect feedback on what works and share it with users. If a feature doesn't work, alert Diligent Community's Customer Success team.
- Request enhancements that will benefit your system's requirements.

"Here's another secret," she adds. "Make the Diligent Community support team your 'bestie' during the migration. The transition will be smoother and far less stressful."

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Smooth transition to Diligent Community from BoardDocs



Significant time savings in agenda packet preparation



Enhanced collaboration across divisions, councils, and committees



Diligent Community supports every step of the migration and beyond

## About Diligent Community

Diligent Community is the next-generation governance solution designed to enhance effectiveness and efficiency for public boards and leadership teams. Tailored to cater to the unique needs of diverse public organizations, Diligent Community empowers streamlined decision-making, ensuring transparent and effective governance. As a trusted offering from Diligent, a leader serving over 14,000 mission-driven organizations globally, Diligent Community is your essential tool for driving impactful governance, fostering better communication, and achieving shared success.

**Learn more**

[community@diligent.com](mailto:community@diligent.com) | [diligent.com/community](https://diligent.com/community)