The PublicLogic Journey: A Step-by-Step Guide to Modernization

Every town runs two systems: the one written in policies and the one lived by staff every day. Real modernization requires understanding both. This document outlines the step-by-step process PublicLogic uses to help towns modernize their operations by starting with a deep understanding of how work *actually* gets done. The core philosophy is that lasting change must be grounded in operational reality. This practical, human-centered process was designed by a Town Administrator (Nathan Boudreau) and a behavioral systems scientist (Dr. Allison Rothschild) to be grounded in Massachusetts General Laws and make modernization achievable and sustainable.

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1. The First Step: The Discovery Session

Every partnership begins not with a sales pitch, but with a conversation. The **Discovery Session** is a focused, 30-45 minute collaborative meeting designed to understand your organization from the inside out. This initial step is crucial for building a foundation of trust and realism before any project begins. The session has three primary goals:

- **Understand the Current Structure:** We first map how work *actually* moves through the town, looking beyond official policies to identify real-world bottlenecks. This prevents building new systems on top of broken processes, which only automates failure.
- **Identify Constraints and Priorities:** We acknowledge the real-world pressures of municipal life, including small teams, tight budgets, and seasonal demands. This ensures the solution is staff-ready and avoids the common pitfall of designing systems that require more staff capacity than a town actually has.
- **Determine the Right Fit:** The session is an honest assessment of whether the PublicLogic framework is the right solution for your organization's specific needs. An open conversation ensures that if a partnership moves forward, it does so with a shared understanding of goals and a high probability of success.

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2. The Assessment: Creating a Map of "What Is"

Before any new systems are built, PublicLogic delivers a complete operational assessment based on the discovery session. This provides leaders with a clear, shared understanding of their starting point, documented in a way that can be shared with staff, boards, and the community. These deliverables turn the initial conversation into an actionable picture for everyone to see.

Discovery Deliverables

Deliverable	What It Is	Why It's Important
Operational Process Map	A precise visual map that shows how work enters the town, how it moves between departments, where it sits, and where breakdowns occur. It reflects the real workflow, not the ideal one.	It provides a shared picture of bottlenecks and risk points, allowing everyone to see and agree on the problems that need to be solved.
System Readiness Report	An analysis of the organization's capacity to sustain change. It looks at factors like staff workload, communication paths, and decision-making structures.	It protects against staff burnout and ensures modernization strengthens institutional knowledge instead of straining it.
Compliance Analysis	A report that identifies where current practices align with legal requirements and where gaps might create legal exposure for the town.	Transforms legal obligations from abstract risks into a clear, actionable roadmap, strengthening the town's position in audits and public records responses.
Recommended First Pilot	A specific recommendation for a pilot project based on the highest-value opportunity that will create the least disruption for staff.	It allows the town to see a tangible impact quickly, building staff confidence and momentum for future modernization efforts.

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3. The Implementation Journey: A 90-Day Plan for Change

Every implementation follows a predictable 60 to 90-day timeline, broken into three distinct phases. This structure is designed to build new habits and ensure staff are supported and confident, not overwhelmed by change.

3.1. Phase 1 (Days 1-30): Setup and Training

This initial 30-day phase is about building a solid foundation for the new system and preparing the team for the transition.

1. **System Configuration:** The PublicLogic framework is set up on platforms the town already owns, such as Microsoft 365, Google Workspace, or CivicPlus. This avoids the cost and learning curve of introducing entirely new software.
2. **Initial Staff Training:** The team receives evidence-based training, designed by Dr. Rothschild to be clear, repeatable, and aligned with how municipal teams actually learn and retain new habits.

3. **Identifying Champions:** Key staff members are trained as internal experts. This creates a sustainable, in-house support network that reduces reliance on external help and empowers staff to lead the change.
4. **Starting a "Parallel Run":** The new system is run alongside the old one. This allows staff to see the new system in action and build confidence with it while their familiar process is still available, de-risking the final switch.

3.2. Phase 2 (Days 31-60): First Live Cycles

This is where the new system makes contact with reality, supported by intensive, in-person guidance. This phase is the most critical for adoption, as staff are never left to "figure it out" on their own.

- **Floor-Walking Support:** PublicLogic partners are physically present to offer on-hand coaching as the staff completes the first two complete cycles of a new process (e.g., running the first two payroll warrants or preparing the first two town meeting agenda packets).
- **Real-Time Refinement:** During these first live cycles, the process is closely monitored. Staff adoption is tracked, and refinements are made based on real use and behavioral feedback, not assumptions.

3.3. Phase 3 (Days 61-90): Stabilization

This final stage is about making the new process the official standard and ensuring it's built to last.

1. The system is optimized based on all the staff feedback gathered during the live cycles.
2. The old, parallel systems are officially retired.
3. The full audit trail is verified to ensure all actions are documented and compliance requirements are met, completing the go-live process.

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4. Life After Go-Live: Ongoing Support and Evolution

The 90-day implementation is designed to make the new system work, but the partnership ensures it *keeps* working. Modernization is not a one-time project, so PublicLogic provides continuous resources to ensure the system remains effective through staff turnover, new regulations, and changing priorities.

Your Support Toolkit

- **A "Living" SOP Library:** Designed for "just-in-time" learning, this library of short videos, QR desk cards, and one-page guides provides answers in the moment of need, reducing frustration and speeding up adoption.
- **Office Hours:** Reliable, scheduled time to get expert help, offered twice-weekly during the first 90 days and weekly thereafter.
- **Quarterly Reviews:** Regular check-ins are scheduled to review how the system is performing, discuss new challenges, and ensure the framework continues to grow with the town's needs.
- **Fast Content Updates:** A promise to update any instructional content within 5 business days, ensuring that documentation always matches the reality of the process.

Conclusion: Ownership and Stronger Communities

Throughout the entire journey, one principle remains constant: the town always owns its records, its workflows, and its structure. PublicLogic and its partners are there to design, configure, and support—not to take custody of municipal data or institutional knowledge. This separation of duties ensures that decision rights, legal responsibility, and institutional memory remain inside Town Hall, building internal capacity, not vendor dependency.

This step-by-step journey fulfills a simple mission: to build smart systems that create stronger communities by making modernization **lawful, measurable, and human.**

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