



The Not-for-Profit Guide to Board Management Software

How Not-for-Profit boards can leverage board management software to boost effectiveness and maximise impact

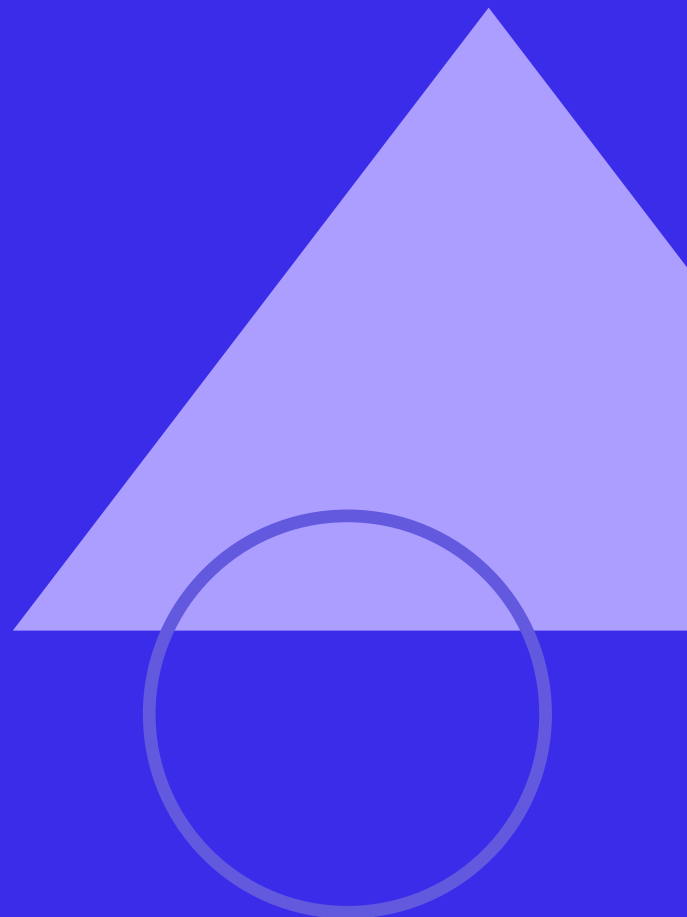


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Foreword

There are approximately 62,000 Charities and Not-for-profit organisations in Australia. These organisations, which support causes ranging from hunger and health care to literacy and animal welfare, play a critical role in our society and our economy.

A board of directors is central to the operations of many of these nonprofit organizations.

Yet, all too often, not-for-profit boards rely on outdated, paper-based processes and procedures. Other boards claim to have “gone digital.” But often, switching from printed materials to PDFs distributed via email is the extent of their “digital transformation.” Neither approach allows a nonprofit board to reach its full potential.

However, a growing number of not-for-profit boards are making the switch to true digital board management by investing in board management software. This trend isn’t surprising, as the right software increases board effectiveness before, during, and between meetings. As a result, nonprofit boards can spend less time on tedious processes and more time making decisions and taking action.

In this guide, we’ll explore what board management software is, how it can increase the effectiveness of your nonprofit board, and what key capabilities to look for when weighing your options. We’ll also share tips for increasing adoption of board management software so you can see the greatest impact.

We hope you’ll find this guide useful – whether you’re exploring board management software for the first time or looking to make the switch from an old solution that no longer fits your needs.



Not-for-Profit Board Management Software, Explained

Every not-for-profit board is on a different stage of its journey. So, it's not surprising that there are varying degrees of familiarity with board management software.

Perhaps this is one of the first times you've heard the phrase "board management software." Maybe you're familiar with the term but could use some clarity on what constitutes board software. Perhaps you've heard this software category referred to by another name – like a board portal, board meeting software, board governance software, or something else altogether.

We're ready to meet you wherever you are on this journey. The best place to start is to take a closer look at what board management software is and how it can help your board streamline everything that happens before, during, and after meetings.

Other names for board management software:

- Board portal
- Board meeting software
- Board governance software
- Board management solution

Not-for-Profit Board Management is Often Rife with Inefficiency

All too often, nonprofit board members are bogged down with inefficient processes and procedures. This inefficiency can stand in the way of a board reaching its potential.

Consider board packets. In many cases, directors don't receive meeting materials until shortly before the meeting – or even at the beginning of the meeting itself. As a result, directors spend a good portion of the meeting reviewing materials and getting up to speed, rather than having productive discussions, making decisions, and acting.

This is just one example of the inefficiency of traditional not-for-profit board management.

The good news is there's a solution: board management software.



What is Not-for-Profit Board Management Software?

Board management software was created to simplify and streamline every step of the board meeting life cycle. That way, boards can achieve more for the organisations they serve.

Board management software provides a secure environment for administrators, executives, and board directors to access meeting materials, collaborate, and execute their governance responsibilities – all in one location. In other words, it's a one-stop-shop for everything related to your governance.

The right board management software drives better collaboration and faster actions, which results in better outcomes for the organization.

The capabilities of board management software vary from vendor to vendor, which we'll explore in more detail later. However, the following outline provides a simple, high-level framework for how any board management solution boosts effectiveness and efficiency before, during, and after board meetings.

How Board Management Software Supports Boards Throughout the Meeting Life Cycle

Driving efficiency and impact before, during, and after board meetings.



Before the meeting

Streamline and simplify meeting preparation so board members can arrive at meetings prepared and ready for productive discussions.

Administrators can:

- Organise and update information, upload minutes, and check director availability
- Distribute board reports, compile agendas, invite directors, and publish board books

Directors can:

- Receive and review board books, annotate and share notes, review past materials, reference documents, and chat with colleagues.



During the meeting

Facilitate productive, collaborative board meetings.

Administrators can:

- Take minutes within the platform, assign tasks, and track follow-ups as the meeting progresses

Directors can:

- Avoid last-minute changes, keeping metrics on track with one-tap navigation.
- Vote within the app, sign paperwork electronically, set deadlines, assign tasks, and follow up on outstanding questions



After the meeting

Drive accountability and collaboration between meetings.

Administrators can:

- Send reminders and notifications to alert directors on outstanding tasks
- Track every vote, signature, survey, minutes, and report for compliance and follow-ups

Directors can:

- Submit eSignatures, cast votes, and respond to surveys

Key Features and Capabilities

Not-for-profit board management software can increase the effectiveness of your board. In fact, the impact of board software on board outcomes is proven.

Nearly three-fourths of leaders who use board management software said their board has become more effective in the past 12 months; 64% said their boards have become more collaborative.

But choosing a board management solution at random doesn't guarantee results.

Not all board management software is the same and it's important to find a solution with features and capabilities that address the unique needs of your nonprofit board.

Your chosen solution should offer a wide range of tools to help directors, administrators, and executives improve processes. These tools must be able to work from anywhere, on any mobile device including iPhones, iPads, and Androids.

Let's take a closer look at some of the must-have features and functionality for board directors and administrators.

Director Features and Capabilities

The success of a nonprofit largely hinges on the effectiveness of its board. Board management software should incorporate intuitive, user-friendly features and capabilities that enable any director to be active and engaged throughout the meeting life cycle.

Let's take a closer look at some of the essential features a solid not-for-profit board management solution should provide for directors.

Preparation

- **Dashboard Homepage:** View upcoming meetings, company announcements, news, and important board information in a centralised space
- **Meeting Calendar:** See upcoming meetings; review prior meeting decisions, notes, and materials
- **Up-To-Date Meeting Materials:** Always view the most current information
- **Notes & Annotations:** Use tools that sync across devices to highlight important information in board books, or mark notes and questions
- **Secure Chat:** Converse with colleagues and staff in the same app that houses the board book

Board management software empowers not-for-profit boards

- **74%** of board management technology users said their board was more effective during the past 12 months
- **64%** said their boards are more collaborative



Engagement

- **Integrated Video Conferencing:** Meet face-to-face within the platform with integrated tools such as Zoom or Microsoft Teams
- **Any Device Access:** Read, review, annotate, and chat on any device
- **Document Archive:** Easily access old board books and vital documents like bylaws, financial reports, and committee assignments
- **eSignatures:** Allow directors to govern from anywhere and execute decisions with one-tap signatures
- **Offline Access:** Sync offline work to automatically save actions and annotations when you go back online
- **Multi-Board Support:** Allow directors who serve on multiple boards to work across organisations with a single login

Security and Compliance

- **Biometric Security:** Require a thumbprint or facial recognition to restrict access and safeguard sensitive board information
- **D&O Questionnaires:** Complete mandated annual Director & Officer (D&O) Questionnaires to disclose relevant business relationships and identify possible conflicts of interest
- **Approvals:** Execute board votes virtually and safeguard compliance with digital records of all board actions

Administrator Features and Capabilities

There are myriad moving pieces involved in board business. Administrators play a key role in keeping everything on track. Board management software should incorporate a broad range of capabilities that enable administrators to optimise their time and effectively manage the many complexities of board business.

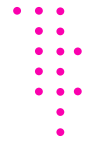
Here's a look at some of the key features a winning board management solution should provide to administrators.

Preparation

- **Meeting Minutes:** Take minutes, create tasks, track attendance, and mark motions as meetings progress
- **Agenda Clone:** Update old agendas with new reports and documents for upcoming meetings
- **Intuitive Board Book Builder:** Quickly compile disparate reports, PDFs, PowerPoints, and Excel sheets with easy-to-use drag-and-drop controls
- **Instant Update:** Update agendas and files within board books and automatically notify directors and others of changes

Managing Board Business

- **Task Management:** Streamline work with a single platform to create, assign, and track tasks
- **Collaboration Tools:** Distribute board book responsibilities to get information to directors faster
- **Announcements and Reminders:** Quickly communicate meeting or policy changes with the whole board or specific committees
- **Resource Center:** Archive and reference mission-critical documents, meeting minutes, and process notes
- **Complete File Compatibility:** Work with various file types, including Word documents, PDFs, Excel spreadsheets, PowerPoint decks, Google Docs, videos, and more
- **Autosave:** Instantly save your work as you go
- **Surveys and Questionnaires:** Collect any opinion or preference from the board, such as member availability or meeting availability
- **Board Assessments:** Complete annual board assessments to help define priorities and foster continuous improvement
- **Skills Tracking:** Map directors' skills and areas of expertise to know where your board stands and identify any gaps
- **Granular User Access Controls:** Stay compliant by restricting director access when there is a conflict of interest



Driving Director Adoption with an Outstanding User Experience

You might purchase the best board management software on the market. But if your directors aren't using it, it won't do much (if anything) in the way of improving board effectiveness.

As such, promoting director adoption is key. This isn't always easy, as nonprofit directors come from a variety of personal and professional backgrounds. While some are tech-savvy and accustomed to using digital tools in their everyday lives, others may be stuck in their ways or uncomfortable with technology and reluctant to adopt a new solution.

How can you get your entire board – even those seasoned, change-resistant directors – on board with board management software? The first step is to choose a solution that offers an excellent user experience.

Directors shouldn't have to hunt for essential information. Instead, everything should be front-and-center, easy to use, and quickly accessible at any time, from any device.

The easier the solution is for directors to learn, the faster they'll adopt it. The faster board members adopt the solution, the faster you'll see improvements in your meeting experiences and board outcomes.

Key UX Considerations

All too often, nonprofit board management software is difficult to use. This creates a poor user experience that weakens adoption – especially among less tech-savvy members.

When considering board management software, user experience (UX) must be top of mind. There are 3 core considerations when evaluating user experience.

1

Intuitive Design

- Clear, well-organised layout
- Easy to explain
- Designed with all users in mind

2

Device Compatibility

- Accessible to directors on the devices they already love
- Works well on all operating systems, including Windows, Mac, iPhones, iPads, Android phones, Android tablets, and Kindle Fires

3

In-App Guides

- Includes an initial tour that shows you where you are, where you can go, and what you can do
- Directors know where to go to learn more or find answers if questions arise



Supporting Board Work – Wherever it Happens

In the past, board meetings primarily took place in a conference room, with all members attending in-person. Today, that's not always the case.

Not-for-profit boards work in a variety of formats. Board meetings can be in-person, virtual, or a combination of the two. Board management software should facilitate simple communication, collaboration, and instant access to board documents and information – regardless of meeting format.

The following capabilities and functionality are key to ensuring your nonprofit board can get work done – regardless of location.



Video Conferencing

- Provides integrated, reliable audio and video streaming
- Works side-by-side with meeting agenda, minutes, and other information functions
- Provides everything you need for your meeting alongside a live video feed



Real-Time Communication

- Provides a secure communication channel that's context-rich and suited for business
- Places real-time communication next to your vital business documents
- Prevents wasted time flipping between emails, text messages, and instant messages looking for context
- Facilitates end-to-end communication and governance in real time



Centralized Resources

- Offers an unlimited, secure, and organised online file system
- Makes past decisions and documents immediately searchable
- Equips executives and directors to learn from the past and make decisions today with tools like:
 - Voting
 - Approvals
 - eSignatures
 - Surveys
 - Secure messaging



Conclusion

Today, a growing portion of nonprofit boards are making the transition to digital board management by investing in a board management portal. With the right board portal, boards can streamline and simplify work and improve collaboration throughout the meeting life cycle. This means boards can achieve more for the nonprofit organizations they serve.

But not all board management software is the same. It's important to find the solution that best fits the needs of your organisation.

With so many choices and so much to consider, it's easy to feel overwhelmed. But it doesn't have to be that way. That's where this guide comes in.

We hope you walk away with a clear understanding of what board management software is, why it's important, and what features and functionality are key to improving the effectiveness of your board. We also hope this becomes a trusted resource you reference often as you navigate the world of board management software – wherever you are on your journey.

OnBoard is the Most Trusted Board Software for Not-for-Profits

Not all not-for-profit board management software is created equal. It's important to find the right solution for the needs of your board and your nonprofit organisation.

Today, a wide variety of successful nonprofit boards, both small and large, leverage OnBoard to simplify and streamline board work and increase their effectiveness and impact.

OnBoard is a purpose-built solution for nonprofit governance and board management. With OnBoard, your board members and administrators always have everything they need related to board work – all in one, secure portal. This enables better collaboration and frees board members to engage in thoughtful discussions and make impactful decisions. And our special nonprofit pricing means our solution is accessible to small teams doing big work.

Here at OnBoard, we're committed to helping you achieve 100% adoption – even among your seasoned, change-resistant board members. That way, you can see the biggest impact possible from your investment.



Ready to see firsthand why top not-for-profit organisations turn to OnBoard to improve collaboration and drive bigger impact? Schedule your live demo today.

[Schedule your live demo today.](#)