



Using Board Portals to Keep Directors Connected

Here's how one organization solved a key board problem – and how you can do the same.

By Alex Sodi

Keeping board members engaged and informed is one of the toughest, yet most crucial, of all nonprofit tasks. For the Humane Society of the United States (HSUS), with more than 500 employees in its Washington, D.C., headquarters and various state and regional offices, this task was especially demanding.

Between meetings, many of the 27 directors would call Janet Frake, the Humane Society's corporate secretary, to request policy documents and meeting minutes. They would admit they had the information somewhere, says Frake, but it was often more efficient to get a new copy than to scan through thousands of pages from past meetings.

Seeking a way to provide these directors better access to information, Frake began researching "online libraries" with guidance from a board member who had experience with internal Web sites used at many corporations.

Online Library Gives Way to Board Portal Solution

Frake's research brought her to a relatively new technology called "board portals," which were gaining popularity. In its simplest form, a

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board portal is a secure, password-protected Web site created by an organization's senior management solely for use by its board members as a convenient way to access board information. Many organizations have implemented portals as a way of eliminating traditional, paper "board books" and the efforts that go into producing and distributing these books.

The Humane Society soon discovered that board portals not only solved the challenge of providing an information repository for board members but were also a more efficient way to distribute pre-board-meeting materials. To truly work, though, the board portal had to meet a number of requirements:

- It had to be easy to use for directors with varying levels of computer literacy.
- The process of posting material to the site had to be straightforward so that staff could handle the work quickly and easily.
- The portal couldn't be burden-

some for the organization's information technology department.

• Among these requirements, ease of use was Priority No. 1. Of the 27 directors, only two grew up in what we call the "computer generation." The rest had differing levels of computer experience.

The Humane Society found a board portal that met these requirements, not only fulfilling the organization's need for a place to locate standing policies but also providing online versions of the organization's board briefing books. The portal's technical support team trained Frake over several hours on how to upload documents and customize the board portal, and worked with directors individually to train them via phone. Despite many directors' lack of computer expertise, they were able to navigate the system easily and soon mastered the technology.

Benefits Go Beyond the Board Meeting

The portal has enhanced board communications by providing a central source for directors to stay up to date not only on board mate-

Having briefing material online has streamlined virtual meetings.

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rials but on organizational initiatives. E-mails alert directors to document changes on the site. Board members, who can even make online notes within their own board portals, are better prepared. The board portal's ability to archive information and make it readily available through a simple key-word search (much like a search engine) has also been a benefit.

Because the Humane Society's directors are dispersed across the country, most committee meetings and all but two of its board meetings are held via teleconference. Having the briefing material online has streamlined these virtual meetings.

“Directors can jump to various pages more effectively, and we know that they are all looking at the latest version of documents,” says Frake. “I can hear them typing on their computers in the background rather than shuffling papers, so I know they're accessing the material online.”

Preparing for board meetings has become far more efficient. Printing, collating, and messengering 27 board books before each meeting was a time-consuming (and thankless) task. There was also the small matter of finding out where board members were so that the books were overnighted to the right location. Now, Frake has reduced the time required to produce board briefing books from 35 to 10 hours. At the same time, the Humane Society is saving roughly 25,000 sheets of paper a year (the elimination of 25 board books at 150 pages apiece, six times a year) and lowering carbon emissions by eliminating overnight delivery, thus begetting a more environmentally conscious organization. ■

Alex Sodi is president and CEO of Diligent Board Member Services (www.boardbooks.com), makers of Diligent Boardbooks, a leading board portal solution.

The Humane Society is saving roughly 25,000 sheets of paper a year.

Resources

Brinckerhoff, Peter, “Using Technology to Advance Your Board,” *Nonprofit World*, Vol. 27, No. 3.

Clark, Della, “Beyond the Board Package,” *Nonprofit World*, Vol. 27, No. 5.

These resources are available at www.snpo.org/members. Also see Learning Institute programs online: Board Governance (www.snpo.org/lino).

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