



Beyond the Board Package



**Technology has revolutionized board-meeting preparation
Here's how to tap into these innovations.**

By Della Clark

In my 16 years as head of a community nonprofit, I've probably sent well over 2,000 board packages to dozens of board members. It's a mind-numbing chore that we repeated time after time, year after year.

You know the drill. A few days before the board meeting, you finalize documents with your staff, make copies, and spread them out on the conference room table.

When The Enterprise Center was in its infancy, I remember collating board documents myself and stuff-

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ing envelopes addressed to board members. Then, usually late in the evening, my staff and I would take armloads of packages to the post office, pay a few dollars to ship each one, and then head home, thinking about all the ways our time—the most precious resource for a small nonprofit—could have been better spent serving our mission.

And, the worst part, much of that time was often wasted altogether. Too many times, board members would tell us “I didn't get my package” or sheepishly admit they'd

lost their packages before they had a chance to open them.

But, I'm happy to say that those days are over.

For the last two years, The Enterprise Center has been using an online service called a board portal to keep our board informed and our staff efficient.

The Case for a Nonprofit Board Portal

Using BoardEffect—our board portal of choice—we now maintain a valuable repository of board information and distribute updates to our board quickly, securely, and efficiently.

Now, days before a board meeting, we finalize documents and upload them to the board portal. The portal then notifies board members of the updates so they can easily download the documents they need for the meeting. In addition, with the board's permission, we can monitor progress and ensure that they've downloaded their materials.

Knowing that we can keep our board up-to-date with just a few mouse clicks takes a huge administrative burden off the staff. Shorter preparation times give everyone more flexibility in planning board meetings. No more marching around the conference room collating papers. No more last-minute trips to the post office. No more planning weeks in advance.

A rough estimate reveals that

we've realized a more than six-fold return on our investment. For every dollar we've invested into our board portal, we've saved six in administrative costs and staff time.

Beyond the administrative savings, there's a strategic advantage. Before using a board portal, our board members spent a lot of time on document review; now, they re-dedicate that time to substantive topics and decision-making. Making the best use of their time makes the best use of our funders' dollars.

Despite the growing pains that always happen when an organization implements a new system, our board members have fully adopted BoardEffect. For them, it means no longer worrying about waiting for the board package to arrive or wondering whether they have the most recent version of an important document before a meeting. Board members can always log in, review the materials, and pull the ones they need.

After the meeting, board members don't have to worry about filing materials for later reference. They can leave documents behind and know they'll be available online.

Our use of board portals is catching on with others we work with, too. Our legal counsel and accountants find reassurance in a system that stays secure, increases board accountability, and maintains version control over our most critical

board documents.

No matter how you measure it—staff time, board satisfaction, saved resources—setting up a board portal system has been a success.

The Challenges of Implementation

We identified one of our biggest challenges early on: getting people on-board with the new system. It's not that our board members aren't technologically savvy or willing or able. It's that they're very busy people. So, rather than asking them to create their own account names and passwords, we set up their accounts in advance, making the first log-ins as seamless and effortless as possible.

Our staff played a key role by encouraging members to use the portal to access important information. Before the portal, staff would send documents as unsecured e-mail attachments. Once the board portal was implemented, staff members sent links to documents on the secure portal, with reminders of how to log in.

After more than two years of gentle encouragement and demonstrated value, I'm proud to say that our board has embraced its board portal. In fact, our new board chair is one of the most vocal advocates for the system and is looking forward to taking advantage of more of its functions.

The Next Step: Board Interaction

Despite our steps forward, we have yet to make the most of our board portal. Now, with the encouragement of our board chair, we're looking forward to using new functions, like the development of an online resource library of important board documents.

A survey by the Alliance for Nonprofit Management reinforces why an online resource library can be a valuable asset to a board. Four out of five nonprofits update their board manuals *at least* every two years. Anyone who has gone through that process knows that it can be a time-consuming exercise that requires strict attention to detail and version control.

For The Enterprise Center, that's valuable time that we could use to further our mission. That's why, in

place of a board manual, we'll be using our portal to store important documents for easy access and review by the board.

We also plan to use the portal to foster more board engagement online. We hope our members will use the portal to collaborate on documents and form special committees to tackle all the challenges that face a mid-sized nonprofit organization.

My job is to promote our organization's mission and values. For years, I've been doing that by motivating and engaging the board. Our board portal simply makes that job easier and more efficient for everyone. ■

Della Clark is president of The Enterprise Center (www.theenterprisecenter.com), an award-winning business accelerator that provides minority entrepreneurs with professional skills, resources, and opportunities to generate and sustain business in the Greater Philadelphia region. The Enterprise Center's board portal provider, BoardEffect® (www.boardeffect.com) is a comprehensive e-governance tool that enables nonprofits to reduce administrative burdens of managing boards and mitigate regulatory and legal risks.

How Do Managers Contact their Boards, and What's the Cost?

According to research from the Alliance for Nonprofit Management and BoardEffect®, many nonprofits face the board management challenges that The Enterprise Center once did. A survey of Alliance members shows that the average nonprofit spends more than \$7,500 annually and requires the efforts of 2-5 staff members to manage the work of its board.

While the average nonprofit is most likely to rely on one-to-one phone calls and e-mail to contact board members, a growing number of nonprofits are using Web-based board portals to facilitate the board's work. On an annual basis, nonprofits reported using the following to contact their boards:

- **one-to-one phone calls:** 2,083 times
- **e-mail:** 1,684
- **face-to face meetings:** 1,095
- **board portal:** 844
- **public Web site:** 719
- **mailings:** 704

For more research results, visit www.boardeffect.com/alliance.

Resources

Bazan, Stan, "Improving Board Meetings: Three Steps to Success," *Nonprofit World*, Vol. 24, No. 6.

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

"Defining Your Board's Needs," *Nonprofit World*, Vol. 26, No. 1.

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

