

OutReach

Vol. 5, No. 2 2014

A Christian Brothers Services Publication

**Christian Brothers Services Acquires
Catholic School Management**

From Pillar to Post

The Homeless Find Help and Hope in Chicago

**Protecting Your
Organization's Treasures**



**CHRISTIAN
BROTHERS
SERVICES**

This article first appeared in OutReach, a Christian Brothers Services publication. Vol. 5, No. 2, 2014.
Reprinted with permission from Christian Brothers Services. All rights reserved.

Are Your Board Meetings Bored Meetings?

Reduce the Clutter and Your Costs

Consider how many board meetings you need to prepare for and attend each year. Also, consider the time and expense necessary to create, produce, ship and carry all of the materials needed for a productive meeting. Do you consider your meetings to be board meetings or *bored* meetings? Bored meetings are those meetings where all necessary materials are still produced on paper and shipped out at least a week in advance of the meeting, where directors and trustees await their packets, carry them on the airplane and (possibly) back to the place where the materials originated. Once at the meeting, board members stake out premium surface space in order to spread all the paper about, only to have the presenter neatly display everything in electronic form on a projector screen. Successful board meetings are those which are most effective and efficient, where board members receive information in a timely and economical fashion.



Stone Age or Modern Times

The days of printing, assembling, making changes, reprinting and shipping cumbersome packets of materials in preparation for board meetings is now a thing of the past. Online board portals can eliminate the hassle and expense of printing, mailing and making changes, reduce the time spent assembling physical packets and allow all members 24/7 access to the documents. These are a few reasons why board portals are becoming increasingly popular with organizations of all types and sizes.

A board portal is collaborative software that allows boards of directors or trustees secure access to board documents via a web browser from any device with Internet access. A board portal can be a custom built, in-house application; an off-the-shelf, commercial application that is deployed by an IT department; or a subscription-based software service. There are a variety of options available, with the more popular portals ranging in base price from \$9,000 to \$28,000.

Board portals provide a variety of benefits for both the administrator and board members. Administrators can reduce time spent on board administration duties; manage and deliver documents through a secure web-based portal; reduce or eliminate the need to print and mail sensitive documents; and easily distribute materials prior to meetings.

Board members receive board packets electronically, notification when new material is posted and have secure instant access to necessary documents, as well as being able to view a dashboard conveniently organized to display recent updates.

Although there are a broad range of features available in the various board portal offerings, some more common trends that will be a part of most portals are listed below.

- ▶ **Strict security:** *Due to the sensitive nature of board information, security and confidentiality are critical. Sometimes, board portals will use two-factor authentication for user logins, role-based access control to information and full encryption of stored materials.*
- ▶ **Online accessibility:** *Board members can review documents and materials at any time, even when they are on the road.*
- ▶ **Offline accessibility:** *Board members can download documents to their computer or mobile device for offline review.*
- ▶ **Board packet creation, modification and distribution:** *Corporate administrative assistants can use the board portal to create board materials and disseminate them online. Edits or document deletions can be made and the changes are immediately distributed.*
- ▶ **Dashboard of recent activity:** *A flexible dashboard is often an integral part of board portal packages. It displays the most recent activity in the board portal, conveniently organized for easy access to updates.*
- ▶ **Data retention policy support:** *To mitigate company liability, board portals enforce data retention policies on documents. Maintaining a board portal allows for electronic copies of records to be stored without having each member maintain hard copies of documents/packets.*

Transform Stone Age Bored Meetings Into Modern Day Board Meetings

While the market place offers a variety of choice, much of what is available contains nice-to-have features not all boards will need or use -- and many of which are priced beyond what some organizations are willing or able to spend. In response to requests from our own board members, Christian Brothers Services (CBS) saw a need for a less expensive solution. The goal was to create a board portal product with the most necessary features, while providing an affordable solution for those organizations that do not need, or want, the expense which accompanies some of the larger products with all of the bells and whistles. The result is the XpressIT Board Portal. Simply put, this is a purpose-driven website which includes the features most needed by larger boards, at a price that is affordable for smaller, budget-conscious organizations.

The CBS XpressIT Board Portal provides members with secure online accessibility. Members can access documents from any device with Internet access and documents can be downloaded to members' devices to provide for offline accessibility as well. The dashboard of recent activity gives members a quick overview of recent documents and updates to the portal and provides one centralized location for all board documents and announcements. Administrators benefit by having the ability to manage committees, documents and members, all in a secure environment using a centralized administration console. User settings and permissions are easily managed from this same console. Administrators can make changes to documents quickly and notify members of updates immediately. The activity log allows the administrator to see which members have logged in, which have not, and which members may need a reminder or assistance. If your organization is interested in transforming your bored meetings to board meetings with a board portal, we are happy to help with the effective, efficient, capable and very economical XpressIT Board Portal. And as for the Stone Age, it's time to leave it in the past and embrace the future. ☀

Lisa Matlock is the Education & Proficiency Manager in the IT & Website Services Division at Christian Brothers Services.

For more information on XpressIT Board Portals, contact Brian Page at 800.807.0100 x3092 or brian.page@cbservices.org.

Take a few minutes to view the member area of the XpressIT Board Portal at <http://www.boardxpress.org/index.php>.
Sign in with the user ID: boardmember
and the password: XpressIT



CHRISTIAN
BROTHERS
SERVICES

1205 Windham Parkway
Romeoville, IL 60446
800.807.0100 cbservices.org

Health / Retirement

Property / Casualty

Consulting / Technology