



A Consumers Guide to Board Portals

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CONSIDERING BOARD PORTALS

INTRODUCTION

A foundation's board of directors requires a lot of collaboration—with other board members, committee members, and foundation staff. That collaborative work requires the ability to review, comment on, and even vote on an enormous amount of material. Everyone involved wants that information to be easily accessible, readable, and actionable. Historically, preparing it could put a burden on foundation staff.

Board members are often spread out geographically, adding another challenge to successful collaboration. Even if board meetings are held face-to-face, much of the work between meetings is done virtually. Software can bridge the distance and unite dispersed collaborators by making it easy to present, review, and comment on information.

The software market is full of tools designed for collaboration, from email and document sharing apps to online conferencing and project management systems. Many of these can be tailored to meet the more specific needs of a board. But a breed of tools has been designed specifically for the board environment.

At its core, this type of tool—called a board portal—helps organization staff manage and create board documents and lets board members share, read, and annotate board books and other meeting documents electronically. Almost all of these systems provide streamlined, easy-to-use interfaces to let even the least tech-savvy board member collaborate and mark up documents on a mobile device. Since most of these tools originated in the for-profit sector and were designed for banks and corporate boards subject to stringent regulations, they provide robust permission and security settings that make it easy to ensure the appropriate users or committee members are accessing sensitive documents.

As the pricing of these tools has come down in recent years, the nonprofit sector has become increasingly interested in them. Vendors have responded by adapting

Board portals are tools designed specifically for organization staff to manage and create board documents and to help board members share, read, and annotate board books and other meeting documents electronically.

to better meet the needs of foundation and nonprofit boards. However, while there are more tools than ever before for smaller foundations and larger nonprofits, the more fully-featured tools can still cost tens of thousands of dollars a year. As a result, there are several distinct classes of tools available, each suited to boards of different sizes and with different needs.

How do you decide which is right for your organization? The first step in choosing any software tool, of course, is understanding your own needs. In this detailed report, we provide a glimpse into the features and functionality different systems provide to help you get a sense of what

to look for in a board portal. We then dive in for a closer look at specific systems and do an apples-to-apples comparison of features to help you understand what might work for you, as well as what differentiates each system.

We began our research by conducting nearly a dozen interviews with foundation staff and board members who had recently gone through the board portal selection process to learn about the features and functionality most needed in such a system. From those interviews, we developed a list of 89 requirements against which we reviewed the systems. We chose to review six systems most commonly used by foundations—Accelus BoardLink, BoardEffect, Boardvantage, Diligent Boardbooks, Directors Desk, and Passageways OnBoard—and conducted two-hour demos of each. For more information about our selection process or other research methodology, see *Appendix A* beginning on page 54.

In the next section, we'll look at the different features and functionality each of the systems we chose provides to meet your foundation's particular needs. If you're not sure your foundation even needs board portal software, you might consider some of the more general tools designed to facilitate collaboration. There's a whole host of options available. We've included an article about them called *Board Portals and Other Tools for Collaboration* beginning on page 58—consider starting there.

WHAT DO THESE SYSTEMS DO?

As you assess your own needs, it can be helpful to understand the typical features and functions that are available in the different systems on the market and compare the functionality between basic and more advanced systems. Based on our interviews with foundation staff and other subject matter experts, we compiled a detailed list of requirements. Generally, those requirements fall under a handful of categories of features and functions described below.

Reading and Annotating Documents

A lot of work goes into creating board books and other materials. Making it easy and intuitive for board members to read and comprehend those documents is essential. Consider how the system handles the Table of Contents for a document. Is it just a listing of sections and page numbers, or does it support a drill-down model where users can click an item to jump to a specific section or document? Does the system create those links in the Table of Contents automatically, or does an administrative user need to manually link each section or document individually?

Documents should also be easy to search through and navigate. Most board portals will let you search for a specific word or phrase within an open document, but can you search all documents at once? In addition, board members need to be able to annotate or mark up meeting documents, highlight or strikethrough text, and write notes or comments. It's important to think about how notes and annotations are handled—ideally, notes should be viewable alongside the original text. Users should also be able to see all notes and annotations in a document at once, either through a summary view or by searching the text of notes for a specific word or phrase.

Some board members may want the ability to print out hard copies of documents. When considering a board portal, it's important to make sure it allows both print and online versions of documents to use the same formatting and images.

Calendars

Board members are busy people. They want to easily see upcoming meeting schedules and to RSVP for board and committee meetings. Most board portals make this functionality prominent and easy to use. Some tools also allow users to assign or view tasks and due dates directly in their calendars—for example, to set a due date in the system for when the board secretary should have the previous meeting's minutes ready, or to assign documents or sections for an upcoming board book to particular users.

Creating Board Books

Assembling a board book and related meeting materials is among the most important roles of a board portal. You may need to create, upload, and organize hundreds of documents for every board meeting, which is why it's essential that the system make this process as smooth and practical as possible. You could always compile multiple documents and assign page numbers and a Table of Contents using Microsoft Word and Adobe Acrobat, or similar tools, but this approach requires considerable time and effort. A board portal, on the other hand, facilitates this task by letting you upload all the documents at once, in order, for automatic assembly—including page numbers, and in some tools, hyperlinked tables of contents.

Depending on who is involved in creating board books (organization staff, the board secretary, committee chairs), you may want to assign specific documents to be created and compiled along with due dates for completion. Some of the more feature-rich—and expensive—board portals provide dedicated editorial workflows for meeting documents with rounds of approval and automatic notifications. Most board portals will enable restricting access to particular documents or sections of a board book by user or group, effectively allowing you to provide a different board book for each committee without creating multiple versions.

Organizing Other Documents

In addition to board books, board members also need access to—and the ability to edit and upload—other materials, including by-laws, meeting minutes, and policies. A good board portal will allow users to easily organize multiple folders and let administrators restrict access to certain folders by user or group, allowing each committee to have its own private workspace within the system.

Collaboration

For organizations with a geographically dispersed board, it's important to provide a centralized space for board members to access documents and communicate with each other. Most board portals will let users share their annotations with other board members, letting them compare notes on possible changes.

Almost all board portals will also support collaboration during meetings. Online official voting and informal straw polls are common, but many lower-cost systems will not distinguish between official and unofficial votes and will record all the votes in the meeting minutes because the laws and regulations around electronic voting for both nonprofit and for-profit boards varies by state. Most board portals will also provide the option for board members to cast their votes anonymously, at least during informal straw polls.

The functionality of mobile apps for board portals is focused on the tasks that a board member will likely need to carry out, including reading and annotating meeting documents or calendar functions.

Mobile Usability

Board portals offer streamlined, user-friendly apps for tablets and other mobile devices that allow users to easily read and annotate documents. In fact, because so many corporate and foundation boards have begun using tablets, a lot of design work has gone into these apps, making them easier to use than desktop or web interfaces. While almost all board portals provide an app for iPads, fewer provide dedicated mobile interfaces for smartphones or Android or Windows tablets. The functionality of mobile apps for board portals is focused on the tasks that board member most likely need to carry out, including reading and annotating meeting documents or calendar functions. Administrative features, such as uploading and creating documents, are restricted to the desktop interface. Most systems have made efforts to provide a layout and design for the desktop version similar to that of the mobile app, but some older systems have focused on the mobile interface to the exclusion of their desktop

interfaces—primarily used by admins—which now look and feel dated. Finally, almost all board portals will let users download meeting documents to the mobile app for offline viewing.

Use in Board Meetings

For boards with geographically dispersed members, the board portal can be an especially useful tool during meetings of either the full board or individual committees. Most lower-cost tools don't provide online conferencing or presentation functionality within the tools themselves, but may be able to integrate with third-party conferencing tools such as WebEx or GoToMeeting at additional cost. More fully-featured board portals may provide their own conferencing platform, which may be desirable for organizations or foundations that don't want to complicate meetings for board members by adding more tools into the mix. If a tool does provide this built-in functionality, it should also let board members with a presenter role share their notes or annotations with the rest of the group.

Finally, some board portals will provide some form of online chat or discussion feature, allowing board members to have conversations about specific documents, committee work, or other topics without leaving the system.

Security and Access Management

Security is a major concern for all organizations, but especially for large, multinational foundations, which may find themselves the target of spying or cyber-attacks as a result of their international giving. While all of the systems reviewed in this report are Cloud-based—hosted on vendor servers and accessed online—many have come out of the for-profit space and are already prepared to meet the security needs of multinational corporations and other large institutions subject to rigorous laws and regulations.

Most board portals provide granular control over who can access specific folders or documents in the system. Admins have the ability to restrict access by user or group, and most systems allow committees to establish their own private folders that other committees

Many board portals will allow you to prevent former users from accessing documents they downloaded to their mobile device, but fewer systems can restrict access to copies of documents saved to a computer.

cannot open or view. Many board portals will allow you to prevent former users from accessing documents they downloaded to their mobile device—possibly by deleting them, but more likely by requiring a valid system login for access—but fewer systems can restrict access to copies of documents saved to a computer. The systems that do provide this feature often use a proprietary encryption on the PDF that requires someone to log into the board portal in order to read the file.

Of course, robust security often comes at the expense of usability, especially for board members who may be less tech savvy. While two-factor authentication—for example, through a code texted to a cell phone or through the Touch ID feature now available for iPad apps—is widely available for these systems, and also widely-recommended, most board portals will allow you to require only a single password for a board member to access documents.

System Administration

A board portal is only useful if board members actually log in and use the tool. Admin users should be able to easily view a summary of how the system is being used—both to see when a particular individual has last logged in and to see the overall usage across all users.

It's also important to consider the data and documents stored in your board portal. Almost all board portal vendors should be backing up your foundation's data with at least two redundant copies—ideally in different, geographically separate data centers—to protect against data loss. Some vendors may have more than two data centers, or maintain multiple backup copies, but as long as the copies are saved in different geographic locations, your data should be safe from most accidents or natural disasters. Finally, most board portals should let you export your own copy of all user data and files, in the original file format, to maintain your own backup or in the event that you want to migrate to a new system.

Support and Training

Whatever else you need in a board portal, at some point you're likely to need customer support. Virtually all reviewed vendors offered solid, basic-level support—phone support, system documentation, and informal training upon request.

In terms of phone support, the difference is likely to be price and quality. How much do you have to pay per incident or per year? Can existing customers typically reach someone knowledgeable when they call for support?

Good user manuals or other support documentation, either printed or online, is also critical. Ideally, information should be available when you need it within the system. For example, you should be able to see what clicking a button will do before you actually click it. However, printed manuals are also useful. You may want to tailor the documentation to your own processes, especially if you're going to roll out a system to a wide range of users, so make sure your system allows you to do this without a lot of extra work.

Training varies among vendors from affordable over-the-phone and online options to more formal on-site instruction. Does the vendor offer training materials? How much will you pay for each training option? Remember that documentation and training have to consider both the needs of admin users (likely your organization's staff) and board members themselves. Does the vendor provide resources specifically tailored for board members, written in a way that lets them quickly and easily find the answer to their question or problem?

Product Background

It takes considerable effort to choose a board portal, upload your files, and get your board members to adopt the tool. You don't want to be forced to repeat the process in a year because the vendor went out of business. When considering a system, consider the vendor, too.

Ask some background questions—how long has it been in business? How many clients does it have, and how many staff members? Does the revenue earned from its system cover the personnel and operational expenses required to support it?

A vendor with a few hundred clients whose revenue covers expenses is likely to be as stable as any other company. Take your own preferences into account when thinking about company size. A small company might provide a more personal feel and better service, while a larger company might have more defined processes around upgrades and issues.

HOW TO CHOOSE

This is not an exhaustive list of the systems available to help you meet your needs, but a list of systems chosen because they are both well-suited to the needs of foundation boards and because they are in widespread use among foundations we surveyed. (For more about our methodology and how we chose these systems, see *Appendix A* starting on page 54.) If you're not sure you need a board portal and think another type of tool might meet your collaboration needs, you can read more about those types of tools in the *Board Portals and Other Tools for Collaboration* article included in *Appendix C* starting on page 58.

Choosing the right system can be difficult, and switching systems can be both expensive and time-consuming, so it's important to think through your needs up front and make a choice that will meet your needs both now and as your foundation evolves. How should you narrow down the choices and focus on the packages likely to work best for you? Here are a few tips:

Consider how board members will access the portal.

All the board portals in this report provide both a desktop interface and an app for tablets, but the vendors heavily promote the tablet apps. It's important to think about how your board members will likely access the portal—or, if you're looking to replace an existing board portal, how they access the current one. If tablets are important to your board members, keep in mind that some board portals will not support devices that run Android or Windows 8.1—in fact, only three of the six board portals in this report provide any support for Android or Windows tablets, and only two provide a Windows app with the same functionality as their iPad apps. Very few board portal tools provide apps for smartphones.

Switching systems is a time-consuming process, so it's important to think through your needs up front and make a choice that will last.

While the tablet apps tend to be streamlined and easy to use, the interfaces for board members who access the portal from a desktop or laptop computer vary widely between systems. Most are substantially different from their complementary iPad apps. If some of your board members are likely to access the board portal from computers while others will access it from tablets, selecting a system with relatively similar web and tablet interfaces will make supporting your board more straightforward.

As a rule, administrative functionality—such as uploading documents and creating the board book—will only be available on the desktop interface. If you expect board members to take an active role in preparing documents or helping put together the board book, you may also want to consider how easy it is to use the portal on a computer in addition to the tablet app.

Identify your meeting priorities.

Board portals also vary considerably in how they support board meetings. Few systems provide any built-in functionality for online presentations for virtual board meetings, and those that do are at the high end of the price range. Most board portals will require you to use third-party online conferencing tools, such as WebEx or GoToMeeting, if board members are geographically dispersed and you need fully virtual meetings.

Also consider whether it's important for your board members to chat with each other within the portal. While some systems will provide the ability for users to chat individually or in groups or share annotations and notes on documents with other individuals or an entire group, others explicitly don't provide this, meaning you'll need to keep those conversations outside of the system in a third-party chat tool. Some foundations, depending on what regulations they are subject to, may prefer to keep any conversations that may be subpoenaed separate from the board portal.

RECOMMENDATIONS

Which of the board portals we reviewed are the best? As always, it depends upon your specific needs. The detailed reviews starting on page 18 will show how each system meets the 89 requirements we used to review them. Only you can determine what features and functions are of most value to your foundation.

To help you choose which system is right for you, we've defined a set of scenarios common to foundation and nonprofit boards and suggested which systems best meet those needs based on our criteria. More than one scenario might fit your own organization's situation, so consider this a starting point. It's worth noting that these scenarios are not mutually exclusive. Each system may be appropriate for more than one scenario, and systems not included in each scenario may also meet those needs—just not, in our opinion, to the same extent as those we chose to mention.

You need to conduct official votes electronically...

While all the board portals in this report provide a voting functionality that works for informal straw polls, these tools provide dedicated functionality for official votes, incorporating electronic signatures to allow your board members to sign documents within the system.

- **Accelus BoardLink**, by Thomson-Reuters
- **Boardvantage**, by Boardvantage, Inc.
- **Diligent Boardbooks**, by Diligent Board Member Services, Inc.
- **Directors Desk**, by The NASDAQ OMX Group, Inc.

You have a small board and price is critical...

You've just been emailing documents between board members and need to upgrade to a board portal to keep everything in one place, but money is tight.

- **Passageways OnBoard**, by Passageways LLC
- **BoardEffect**, by BoardEffect

You need to be able to conduct meetings online within the system...

Because your board members are geographically dispersed, it's not practical to conduct meetings in person. You also don't want to complicate matters for board members by using a third-party online conferencing tool for your meetings.

- **Boardvantage**, by Boardvantage, Inc.
- **Directors Desk**, by The NASDAQ OMX Group, Inc.

You need robust collaboration support...

While all board portals will provide a central place to store important board documents for your committees, these tools will let board members collaborate on those documents by sharing their notes and annotations with each other, either individually or to a whole group.

- **Boardvantage**, by Boardvantage, Inc.
- **Directors Desk**, by The NASDAQ OMX Group, Inc.

Your board members want to use Android or Windows tablets...

While most board portals provide a dedicated interface for iPads, only a few will support other mobile operating systems. Apple's tablets are the most common devices among the nonprofit and foundation boards we spoke with, but if some board members want to use Android or Windows 8.1 tablets, these tools will provide support for multiple operating systems.

- **Diligent Boardbooks**, by Diligent Board Member Services, Inc.
- **Directors Desk**, by The NASDAQ OMX Group, Inc.

You need a robust user workflow for creating board books...

Multiple staff or board members are creating and providing materials for each board book, and you need strong control over who is responsible for each section or document. It's important that your board portal can automatically notify an admin user when each document is uploaded and needs comments or approval.

- **Diligent Boardbooks**, by Diligent Board Member Services, Inc.

COMPARISON MATRIX

	Accelus BoardLink	BoardEffect	Boardvantage	Diligent Boardbooks	Directors Desk	Passageways OnBoard
First-year Costs (10 board members, 1 admin, 1 committee, 1 GB cloud storage)	***	\$6,000	\$12,000	\$7,800	***	\$1,750
Recurring Annual Costs (10 board members, 1 admin, 1 committee, 1 GB cloud storage)	***	\$6,000	\$12,000	\$6,800	***	\$1,250
First-year Costs (20 board members, 5 admins, 5 committees, 50 GB cloud storage)	***	\$8,000	\$26,000	\$17,800	***	\$5,750
Recurring Annual Costs (20 board members, 5 admins, 5 committees, 50 GB cloud storage)	***	\$8,000	\$26,000	\$15,500	***	\$3,750
First-year Costs (40 board members, 10 admins, 10 committees, 100 GB cloud storage)	***	\$10,000	\$51,000	\$35,500	***	\$8,000
Recurring Annual Costs (40 board members, 10 admins, 10 committees, 100 GB cloud storage)	***	\$10,000	\$51,000	\$30,900	***	\$6,000
Reading and Annotating Documents	●	○	○	○	◉	●
Calendars	○	○	○	◉	○	◉
Creating Board Books	◉	◉*	○	●	○	◉
Organizing Other Documents	●	○	●	●	●	○
Collaboration	◉	◉	●	○	●	◉
Mobile Usability	○	○	○	○	●	○
Use in Board Meetings	•	◉	●	•	○	•
Security and Access Management	•	○	●	●	●	○
System Administration	●	●	○	○	●	○
Overall Usability	○	○**	○	●	○	●

• None ◉ Fair ○ Good ● Excellent

* At the time of the demo, this system did not meet a criteria needed for a 'Solid' rating. The vendor has since launched or will launch an update to the system to provide this functionality, but Idealware could not confirm or review it by publication time.

** At the time of the demo, this system did not meet a criteria needed for an 'Excellent' rating. The vendor has since launched or will launch an update to the system to provide this functionality, but Idealware could not confirm or review it by publication time.

*** The vendor declined to provide pricing for the system.

INDEX OF BOARD PORTALS

INDEX OF BOARD PORTALS

Now that you've read through our thoughts and recommendations about the systems, it's time to dive down into more detail. This section provides short Idealware reviews of each of the board portals included in this report. Detailed reviews begin on page 18.

Accelus BoardLink

Thomson-Reuters Accelus BoardLink provides support for creating and managing board books and other meeting documents, with an easy-to-use interface that allows mobile users to read and annotate documents, access text annotations across a variety of devices, and share individual annotations with other system users via email messaging. Creating a board book is a straightforward process in which an admin creates a section and then links associated documents to the section. The tool makes it easy to replace documents with updated versions, but annotations do not carry over to new version(s). The web interface for the system contains prominent navigation items labeled with a large, easy-to-read font, and a dashboard separated into four sections that display key content. The Voting and Survey functions are very easy to use and official votes can even include board signatures. There is no presentation mode or online conferencing ability. Users can email each other through the system, but there is no chat or open discussion capability. The vendor declined to provide pricing for the system.

BoardEffect

BoardEffect provides solid support for creating and managing board books and other meeting documents. Its intuitive iPad interface makes it easy for board members to read and annotate documents. Admin users can create multiple layout templates for board books, which is particularly useful for organizations with more than one board or that need substantially different materials for different committees. Creating a board book is a straightforward process. You can restrict permissions to specific documents to individual board members or groups, but this may be tedious for board books with a large volume of documents (grant summaries or proposals needing board review, for example) as you can only upload up to 10 documents at a time through the drag-and-drop interface and uploading documents to specific sections may require several steps or screens. The system no longer provides built-in chat functionality for board members, and there is no built-in support for online conferencing or presentations. Organizations looking to support fully virtual or remote board meetings will need to use a third-party conferencing tool. As of report publication, the vendor has released an updated user interface. Upcoming meetings and board books will now be located more prominently. In addition, a more streamlined process for creating board books, including a drag-and-drop interface for uploading or arranging documents on a single screen, is also now available. Pricing starts at \$6,000 per year for up to 20 users, including support, training, and unlimited data.

Boardvantage

Boardvantage provides solid support for creating and managing board books and other meeting documents. Its easy-to-use interface allows mobile users to read and annotate documents, access annotations across a variety of devices, and share annotations with other system users. Creating a board book is a straightforward process, and while the tool makes it simple to upload a variety of documents to include in a board book, linking the documents to an agenda or Table of Contents is a more manual process. The tool makes it easy to replace documents with updated versions, and Word, Excel and PowerPoint documents can be edited within the system. The desktop interface is similar to an intranet or SharePoint site, with smaller fonts and sometimes hidden contextual menus in the Repository module. Board members have quick access to important documents, meetings, approvals, and surveys in the Briefcase module. The Approval and Survey

modules are very easy to use and official approvals can even include board signatures. Present mode in the Meetings module is a built-in online conferencing tool that allows presenters to guide meeting participants' views of materials. Online discussions are also possible within Meetings. Pricing is based on the number of users and license type, starting at \$12,000 per year for up to 10 users and one admin.

Diligent Boardbooks

As one of the most established systems on the market, Diligent Boardbooks provides solid functionality for organizations that need granular permission settings or editorial controls over their meeting documents. The system provides robust workflow for board books, including automated notifications for internal review and a multi-step approval process that allows directors to add notes on what needs to change for approval. The iPad and Windows 8.1 apps for the system are easy-to-use and intuitively labeled, with a modern interface; the online version is labeled clearly and intuitively, but the interface itself—which is designed to resemble a physical notebook—is straightforward but dated. The voting functionality for official board votes is well-thought-out, allowing board members to add their e-signatures to approve a specific document, but as an admin user must add a signature block for each voting board member directly to the document, this functionality may be less well-suited for spontaneous votes or informal straw polls. There is no internal chat or presentation functionality provided in the system—as with many other board portal solutions, you'll need to use third-party chat or online conferencing tools if that is important to your organization. Licensing costs are based on annual user fees, starting at \$6,800 per year for North American nonprofits—including training, support, and data—in addition to the cost of implementation.

Directors Desk

Directors Desk is a full-featured tool that allows organizations to manage most aspects of board collaboration and governance, including scheduling board meetings, creating and managing board books and other meeting documents, managing meeting activities, and tracking board participation and preparedness. The iPad app provides access to nearly all of the portal's board-facing functionality, including reading and annotating documents, voting, document libraries, and messaging. Creating a board book is a straightforward process in which an admin creates a section and then links associated documents to the section. Documents can be replaced and annotations are carried over into new version(s). The web interface for the system contains two separate navigation menus with tabs for different tools across the top, and contextual action items to the left. The vendor reports that the web interface colors can be customized. The dashboard contains a list of new items and upcoming meetings and events. The Voting and Survey functions are very easy to use and official votes can even include board signatures. Board members can use the tool for presentations, and it integrates with third-party conferencing tools. Users can email each other through the system or participate in discussions on the site, but there is no chat capability. Pricing for the system is an annual fee and scales based on the number of users who need access to the site, but the vendor declined to provide further details.

Passageways OnBoard

Originally developed for the financial sector, Passageways OnBoard provides a streamlined, easy-to-use platform for organizations that need solid functionality for creating and reading board books and other meeting documents. Both the iPad app and web interface for the system are well laid out and easy to use. Creating a board book is a straightforward and intuitive process of building out the sections and agenda items through a drag-and-drop interface and uploading the related document to each section or agenda item. The voting functionality for official votes in a meeting is prominently located and easy enough to set up on the fly, but you'll need a third-party tool to create and conduct a survey or self-assessment of board members. In the spirit of streamlining the system for ease of use, there is no additional functionality to support online or virtual board meetings. If this is important to your organization, you'll likely need a third-party online conferencing tool. Pricing for the system starts at \$1,250 a year for up to 11 users for the Essential Edition, with an initial set-up fee of \$500.

REVIEWS OF THE BOARD PORTALS

ACCELUS BOARDLINK

Thomson-Reuters Accelus BoardLink provides support for creating and managing board books and other meeting documents, with an easy-to-use interface that allows mobile users to read and annotate documents, access text annotations across a variety of devices, and share individual annotations with other system users via email messaging. Creating a board book is a straightforward process in which an admin creates a section and then links associated documents to the section. The tool makes it easy to replace documents with updated versions, but annotations do not carry over to new version(s). The web interface for the system contains prominent navigation items labeled with a large, easy-to-read font, and a dashboard separated into four sections that display key content. The Voting and Survey functions are very easy to use and official votes can even include board signatures. There is no presentation mode or online conferencing ability. Users can email each other through the system, but there is no chat or open discussion capability. The vendor declined to provide pricing for the system.

- **Pricing—Small Boards:** The vendor has declined to provide pricing for the system.
- **Pricing—Mid-Sized Boards:** The vendor has declined to provide pricing for the system.
- **Pricing—Large Boards:** The vendor has declined to provide pricing for the system.

Reading and Annotating Documents

- **Document Quick Search:** Users can easily find and navigate through documents in a board book using the search tool in the left menu.
- **Searching Document Text—Within Document:** Lets you search the text of a board book for a specific word or phrase, using the built-in search functionality.
- **Searching Document Text—All Documents:** Lets you search the text of all documents in the board portal for a specific word or phrase, using the built-in search functionality.
- **File Format:** Lets you view documents in their native file format or a familiar PDF format.
- **Document Formatting:** Electronic documents look exactly the same as a printed version of the board book.
- **URLs in the Document:** When board members click on a link in a document, it opens as a new window in the browser.
- **Documents From Past Meetings:** Documents from past meetings are stored in the Documents section of the tool.
- **Printing the Board Book:** Lets you print the entirety of the board book if print functionality is enabled.
- **Printing Excerpts:** Lets you print out specific sections or pages of the board book if print functionality is enabled.
- **Table of Contents:** The Table of Contents does not support a drill-down module. Links to documents must be added manually. If there are numerous documents in a section, you can add them via multi-select.
- **Document Bookmarks:** Board members can bookmark a page in the board book, to easily return to for later reading.
- **Document Annotation—Writing Notes in a Document:** Lets board members add a note that they can see next to a particular piece of text in the document.

- **Document Annotation—Summary of Notes:** Lets board members see all the notes they've made in a "notes view" rather than having to page through the whole document.
- **Document Annotation—Searching Within Notes:** Board members can search their own notes in a document.
- **Document Annotation—Marking Up Text:** Lets board members highlight or strike through text in a document, or draw free hand notes.
- **Document Annotation—Method:** Lets you annotate board book documents using functionality embedded in the tool itself.
- **Document Annotation—Integration:** The software does not allow for linking to third party software or databases.

Calendars

- **Calendar of Meetings:** Board members can see a calendar of all their upcoming grant and committee meetings on the user dashboard.
- **Calendar of Deliverables:** Board members can see a list of upcoming deliverables on their calendar.
- **Calendar Customization:** Board members cannot customize their calendar. Board members cannot choose which calendars to display.
- **Scheduling a Meeting Time:** Does not let you send out a meeting scheduling survey to board members to find a time to schedule a meeting and automatically confirm availability onto the calendar.
- **Calendar Integration:** Users can sync meetings and events with Microsoft Outlook.

Creating Board Books

- **Board Book Assembly:** Lets you associate all the documents for a board meeting by uploading documents or selecting existing documents from the Documents section and linking them to items in the Table of Contents.
- **Creating a Table of Contents:** You can create a Table of Contents when creating the book.
- **Reusing Table of Contents:** Lets you copy the structure of the Table of Contents from a previous board book using the layout template functionality.
- **Arranging Board Book Documents:** Lets you re-order documents for a board book through a drag-and-drop interface, either by reordering the sections of the board book or by reordering each document one at a time within a single section, or by using the move up or down option on the contextual menu.
- **Uploading Files to Board Book:** You can upload files individually or upload a zip file containing multiple files and link them to the relevant section when creating the board book. The system automatically generates unique page numbers for the documents within the board book.
- **Bulk Uploading of Files to Board Book:** Lets you upload a zip file containing multiple documents.
- **Meeting Agenda:** You can add an agenda item as a section and upload a meeting agenda to attach to that section.
- **Updating Uploaded Documents:** You can easily update a document in the board book by using the "replace" function.
- **Syncing Updated with Offline Copies:** The system notifies users when a new version is available for download.
- **Preserving Annotations:** Uploading a new version of a document in the board book does not preserve annotations from the previous version(s).
- **File Formats for Upload:** Lets you easily incorporate Microsoft Word, Excel and PowerPoint documents, PDF, and image files into board book packets.
- **Preserving Original Formatting:** Lets you incorporate documents with complex formatting, including chapters and columns, into board book packets.

- **Draft Versions:** Lets you save a board book in progress as a draft version to restrict board members from accessing it.
- **Workflow/Editorial Controls:** There is no automated workflow for editorial approval of documents or board books.
- **Importing Grant Reports:** You can upload a grant report as you would any other document.
- **Multiple Meeting Documents:** Lets you publish multiple board books for one board meeting (i.e. for committee meetings), and set permissions by version to restrict access to specific committees or groups.
- **Archiving:** Board books can be archived by moving them to a different folder. Archived versions do not retain annotations.

Organizing Other Documents

- **Organization Structure:** Lets you create folders to store documents that aren't associated with meetings (e.g. bylaws).
- **File Hierarchy:** Lets you create an unlimited number of levels of folders to organize documents.
- **Uploading Other Documents:** Lets you upload and easily view documents associated with a meeting that aren't in the board book (e.g. meeting minutes).
- **Saving Documents in Multiple Locations:** Lets you upload a particular document to a particular a folder in the system, and link to that file in a board book.

Collaboration

- **Official Voting:** Lets a board take an official board vote within the portal, in the Voting section. Votes can even include electronic signatures. There is no distinction in the system functionality between official and informal voting or polls.
- **Informal Polling:** Lets a board take a non-official vote or poll within the portal, in the Voting section. There is no distinction in the system functionality between official and informal voting or polls.
- **Board Surveys:** Lets a board take a longer survey in the Survey section.
- **Anonymous Voting:** Does not let a board take an anonymous vote. Users can always see which way each board member voted on a particular vote.
- **Call-to-Vote:** A board member can setup a call-to-vote or poll, if granted admin access.
- **Shared Annotations:** Lets a board member email individual annotations to another board member or group.
- **Collaborative Editing:** Does not let multiple users edit the same document collaboratively in real-time.
- **Email Notifications:** Provides the option to send board member email alerts when a board book is ready and/or updated.
- **Capturing Email Threads:** Does not let board members capture in the portal email discussions from outside the system.
- **Discussion Digest:** Does not provide a daily email digest of portal discussions to board members.
- **Proposal Evaluation:** There is no dedicated functionality to facilitate board members rating or scoring individual grant proposals within the portal, but the vendor reports that the Voting or Survey functionality could be used for this purpose.
- **Document Versioning:** Replacing a document in the system will not overwrite the previous uploaded version. Admins can access versions from the contextual menu by date.

Mobile Usability

- **Mobile Usability—iOS:** The iPad app for the system is well laid-out and easy to use. Navigation and menu items are prominently located and large enough to effectively use on the touchscreen, and labeled intuitively. Annotation and navigation buttons within a document are located in a slide-out menu and intuitively labeled with graphic icons.
- **Mobile Usability—Android, Windows, other mobile OS:** There is no dedicated mobile interface for Android or Windows devices.
- **Desktop Usability:** The web interface for the system contains prominent navigation items labeled with a large, easy-to-read font, and a dashboard that is separated into four sections that display key content.
- **Mobile Access—Smartphones:** The iPhone app contains all the features and functions of the iPad app. There is not an app available for other mobile operating systems.
- **Annotating on Mobile Devices:** The system syncs text annotations across all devices. Freehand annotations sync between the iPad and iPhone apps only.
- **Offline Access:** Lets you download documents to a computer or mobile device for offline viewing.

Use in Board Meetings

- **Multiple Presenters:** The system does not have a presentation mode.
- **Facilitated Reading:** The system does not have a presentation mode.
- **Chat:** The system does not provide online chat functionality. Board members can send email messages in the system.
- **Online Conferencing and Presentation Tools:** There are no online conferencing or presentation tools. The system does not integrate with any external tools.
- **Managing Documents for Policy-Based Governance:** Grant Reports can be linked to board books as any other document in the system.

Security and Access Management

- **Security Settings:** Admin users cannot specify security settings for users, or turn off all security features except a single-factor login.
- **Secure File Format:** Board documents are stored in the system with 128-bit encryption. Board books are stored in the system with 128-bit encryption.
- **Download Permissions:** Lets you prevent users from downloading or printing a board book or other document.
- **Password-Protected Folders:** Lets you grant access to specific folders by individual user or group of users, to allow only members of a specific committee to view the documents in that folder.
- **Board-Only Folder Access:** Does not let you setup folders to store documents that the system admin cannot access. System admins always have the ability to access all files in the system.
- **Single Sign-On:** A board member using the tool for a different board can use the same log in information for both boards.
- **Two-Factor Authentication:** Standard two-tier authentication consists of a unique user name and password as well as a challenge question or hardware token.
- **Robustness of Security Protocols:** The system security meets the needs of large, international or security conscious foundations or corporations.
- **Non-Retrieveable Documents:** Documents saved within the mobile app for offline reading can be purged from the user's device next time the user connects to the system.

System Administration

- **Login History:** Admin users can run a report to see when users have last logged into the portal.
- **Summary of Usage:** Admin users can run a report to see a summary of overall user access.
- **System Backup:** The vendor backs up all client data to two redundant data centers in North American and Europe.
- **Exporting System Data:** All user data and files can be exported by an admin user, in their original formats.

Support and Training

- **User Support:** The vendor provides 24/7 phone and email user support and training, tailored for board member users, at no additional cost.
- **User Documentation:** The vendor provides live online training and written documentation tailored for board member users. Admin users can edit or customize the written documentation.
- **Manuals and Documentation:** The vendor provides live online training and written documentation tailored for admin users.
- **Training:** The vendor provides live online or in-person training for board member users.
- **Migration:** The vendor can provide migration assistance for new clients, including uploading documents into the system, at no additional cost.

Product Background

- **History:** Thomson Reuters Corporation in its current incorporation has existed since 2008; Accelus BoardLink has been in use since 2005.
- **Clients:** The vendor has declined to provide information for this criteria.
- **Sustainability:** The vendor has declined to provide information for this criteria.

Usability

- **Ease of Use—Board Members:** The iPad app for the system is well laid-out and easy to use. Navigation and menu items are prominently located and large enough to effectively use on the touchscreen, and labeled intuitively. Annotation buttons within a document are located in a slide-out menu and intuitively labeled with graphic icons. The web interface for the system contains prominent navigation items labeled with a large, easy-to-read font, and a dashboard that is separated into four sections that display key content.
- **Ease of Use— Administrators:** The admin interface for the system contains prominent navigation items labeled with a large, easy-to-read font, and a dashboard that is separated into four sections that display key content. Creating a new meeting and board book is easy, as is uploading files for a board book, and files are linked to section-by-section. Many settings for meetings and board books, such as privacy settings, pagination, and style and layout options, are controlled through checkboxes and drop-down menus.

BOARDEFFECT

BoardEffect provides solid support for creating and managing board books and other meeting documents. Its intuitive iPad interface makes it easy for board members to read and annotate documents. Admin users can create multiple layout templates for board books, which is particularly useful for organizations with more than one board or that need substantially different materials for different committees. Creating a board book is a straightforward process. You can restrict permissions to specific documents to individual board members or groups, but this may be tedious for board books with a large volume of documents (grant summaries or proposals needing board review, for example) as you can only upload up to 10 documents at a time through the drag-and-drop interface and uploading documents to specific sections may require several steps or screens. The system no longer provides built-in chat functionality for board members, and there is no built-in support for online conferencing or presentations. Organizations looking to support fully virtual or remote board meetings will need to use a third-party conferencing tool. As of report publication, the vendor has released an updated user interface. Upcoming meetings and board books will now be located more prominently. In addition, a more streamlined process for creating board books, including a drag-and-drop interface for uploading or arranging documents on a single screen, is also now available. Pricing starts at \$6,000 per year for up to 20 users, including support, training, and unlimited data.

- **Pricing—Small Boards:** \$6,000 annual recurring fee for up to 20 users includes support, training, and unlimited data.
- **Pricing—Mid-Size Boards:** \$8,000 annual recurring fee for up to 40 users includes support, training, and unlimited data.
- **Pricing—Large Boards:** \$10,000 annual recurring fee for up to 80 users includes support, training, and unlimited data.

Reading and Annotating Documents

- **Document Quick Search:** You can easily find and navigate through documents in a board book using the prominently-located search tool in the user navigation menu. The search tool is only available in the directory and the Resource Library.
- **Searching Document Text—Within Document:** Lets you search the text only of the documents in the Resource Library for a specific word or phrase by using the built-in search functionality.
- **Searching Document Text—All Documents:** Does not let you search the text of all documents in the board portal for a specific word or phrase.
- **File Format:** Lets you view documents in a familiar PDF format.
- **Document Formatting:** Electronic documents look exactly the same as a printed version of the board book.
- **URLs in the Document:** When board members click on a link in a document, it opens as a new tab in the browser.
- **Documents From Past Meetings:** Board members can easily navigate to documents from a past board meeting through the archive functionality.
- **Printing the Board Book:** Lets you print out the entirety of the board book by downloading the PDF and printing from your computer's PDF viewer.

- **Printing Excerpts:** Lets you print out specific sections or pages of the board book by downloading the PDF and printing from your computer's PDF viewer.
- **Table of Contents:** The Table of Contents supports a drill-down model of automatically linking to subsections.
- **Document Bookmarks:** Board members can bookmark a page in the board book to easily return to for later reading.
- **Document Annotation—Writing Notes in a Document:** Lets board members add a note that they can see next to a particular piece of text in the document.
- **Document Annotation—Summary of Notes:** Lets board members see all the notes they've made in a "notes view" rather than having to page through the whole document.
- **Document Annotation—Searching Within Notes:** Lets a board member search the full text of the board member's own notes in a document.
- **Document Annotation—Marking Up Text:** Lets board members highlight or strike through text in a document, or draw free hand notes.
- **Document Annotation—Method:** Lets you annotate board book documents using functionality embedded in the tool itself.
- **Document Annotation—Integration:** Lets you choose the PDF annotation software that you want to use for downloaded/offline copies of documents only.

Calendars

- **Calendar of Meetings:** Board members can see a calendar of all their upcoming grant and committee meetings on the user dashboard.
- **Calendar of Deliverables:** Board members can easily see a list of upcoming tasks and their due dates on the user dashboard.
- **Calendar Customization:** Lets you filter upcoming meetings and events on the calendar by event type. By default, you only see events assigned to the groups to which you belong.
- **Scheduling a Meeting Time:** Does not let you send out a scheduling survey to board members to find a time to schedule a meeting and automatically confirm availability onto the calendar. You could create multiple meetings with RSVPs or create a survey (to collect feedback on availability, but not schedule the meeting) to accomplish this.
- **Calendar Integration:** You can download meetings and events and manually import them to Microsoft Outlook or other email and calendar client.

Creating Board Books

- **Board Book Assembly:** Lets you associate all the documents for a board meeting by uploading documents or selecting existing documents from the Resource Library. You can create or select from a list of templates to set the layout for the board book.
- **Creating a Table of Contents:** Lets you easily create a Table of Contents for a board book as part of the board book creation process. The sections and items of the Table of Contents are not automatically linked to those documents in the board book itself, but it does create bookmarks for each section or item.
- **Reusing Table of Contents:** Lets you copy the structure of the Table of Contents from a previous board book using the layout template functionality.
- **Arranging Board Book Documents:** Lets you easily reorder documents for a board book one at a time within a single section through a drag-and-drop interface.
- **Uploading Files to Board Book:** Lets you upload documents for a board book in a specific order and automatically generate unique page numbers for the documents within the board book.

- **Bulk Uploading of Files to Board Book:** Lets you easily upload up to 10 documents at a time from one folder to the board book and reorder them through a drag-and-drop interface.
- **Meeting Agenda:** The system automatically creates a meeting agenda for each board book, which is separate from the Table of Contents.
- **Updating Uploaded Documents:** Does not let an admin user upload a new version of a document into the board book after the board book is published. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.
- **Syncing Updated with Offline Copies:** The iPad app will notify users if a new version of a document that has been downloaded for offline reading is now available.
- **Preserving Annotations:** Uploading a new version of a document preserves and carries over annotations from the previous version(s). In the iPad app, downloading an updated version of a document that has been downloaded for offline reading preserves and carries over annotations from the previous version(s).
- **File Formats for Upload:** Lets you easily incorporate Microsoft Word and Excel documents, PDF, and image files into board book packets.
- **Preserving Original Formatting:** Lets you incorporate Microsoft Word documents with complex formatting, including chapters and columns, into board book packets.
- **Draft Versions:** Lets you save a board book in progress as a draft version to restrict board members from accessing it until it is ready to be published.
- **Workflow/Editorial Controls:** There is no automated workflow for editorial approval of documents or board books, but the vendor reports that the poll and notification functionalities could be used for this purpose.
- **Importing Grant Reports:** Lets you import a grants management system report as you would any other file. The vendor can integrate the system with third-party grants management systems using the API, at additional cost.
- **Multiple Meeting Documents:** Lets you publish multiple board books for one board meeting (i.e., for committee meetings) and set passwords by version to restrict access to specific committees or groups.
- **Archiving:** Lets you easily archive board books after a meeting through a prominent link next to the board book. Archived board books do not retain annotations.

Organizing Other Documents

- **Organization Structure:** Lets you create folders to store documents that aren't associated with meetings (e.g., bylaws).
- **File Hierarchy:** Lets you create an unlimited number of levels of folders to organize documents.
- **Uploading Other Documents:** Lets you upload and easily view documents associated with a meeting that aren't in the board book (e.g., meeting minutes) as part of the Resource Library.
- **Saving Documents in Multiple Locations:** Lets you upload a particular document to a particular folder in the system and copy that file to a board book.

Collaboration

- **Official Voting:** Lets a board take an official board vote within the portal using the Board Polls functionality. There is no distinction in the system functionality between official and informal voting or polls.
- **Informal Polling:** Lets the board take a non-official vote or poll using the Board Polls functionality. There is no distinction in the system functionality between official and informal voting or polls.
- **Board Surveys:** Lets the board take a longer survey, such as a self-assessment. Survey responses can be made confidential or anonymous.
- **Anonymous Voting:** Lets the board take either an anonymous or non-anonymous vote or poll. If you want to keep voting records confidential from board members, but still allow admin users to view how each member voted, you would need to use the survey functionality instead.

- **Call-to-Vote:** A board member can set up a call-to-vote or poll if granted control of a workroom or meeting by an admin user.
- **Shared Annotations:** Does not let a board member share notes with other users within the system. They must download copies of a document in order to share annotations.
- **Collaborative Editing:** Does not let multiple users edit the same document collaboratively in real time.
- **Email Notifications:** Sends email alerts to a board member when a board book is ready and/or updated.
- **Capturing Email Threads:** Does not let board members capture in the portal email discussions from outside the system.
- **Discussion Digest:** Does not provide to board members a daily email digest of portal discussions.
- **Proposal Evaluation:** There is no dedicated functionality to facilitate board members rating or scoring individual grant proposals within the portal, but the vendor reports that the poll or survey functionality could be used for this purpose.
- **Document Versioning:** Uploading a new version of a document to the portal will not overwrite the previous uploaded version.

Mobile Usability

- **Mobile Usability—iOS:** The iPad app for the system is well laid out and easy to use. Navigation and menu items are prominently located, labeled intuitively, and large enough to effectively use on the touchscreen. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons.
- **Mobile Usability—Android, Windows, Other Mobile OS:** There is no dedicated mobile interface for Android or Windows devices.
- **Desktop Usability:** The web interface for the system is straightforward and navigation and menu items are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be found on the user dashboard. Creating a new meeting or board book is mostly intuitive, but may require several steps or screens to upload documents. As of report publication, the vendor has released an updated user interface with upcoming meetings and board books located more prominently and a more streamlined process for creating board books, including a drag-and-drop interface for uploading or arranging documents on a single screen.
- **Mobile Access—Smartphones:** There is no dedicated mobile interface for smartphones.
- **Annotating on Mobile Devices:** The system does not currently sync annotations between the app and the web interface.
- **Offline Access:** Lets you download documents to a computer or mobile device for offline viewing.

Use in Board Meetings

- **Multiple Presenters:** As the system does not include online conferencing functionality, there is no presenter role.
- **Facilitated Reading:** The system does not provide functionality that would allow a meeting facilitator to control all board members' view of the board book on their individual tablets.
- **Chat:** Does not provide functionality for board members to participate in an online chat within the portal. Board members can collaborate using the discussion functionality.
- **Online Conferencing and Presentation Tools:** The system does not include online conferencing functionality to facilitate virtual board meetings. The vendor can integrate the system with third-party online conferencing tools using the API, at additional cost.

- **Managing Documents for Policy-Based Governance:** Does not allow you to link to an uploaded document from the Resource Library in a board book. You must make a new copy of the document.

Security and Access Management

- **Security Settings:** Admin users can specify security settings by user and per folder or document, with the potential to turn off all security features except a single-factor login.
- **Secure File Format:** Board documents are stored in the system as PDF files.
- **Download Permissions:** Lets you prevent users from downloading or printing a board book or other document.
- **Password-Protected Folders:** Lets you create different folders for different committees that allow only members of that committee to view the documents in that folder.
- **Board-Only Folder Access:** Does not let you set up folders to store documents that the system admin cannot access. System admins always have the ability to access all files in the system.
- **Single Sign-On:** A board member using the tool for multiple boards cannot use the same login information to access each board's information.
- **Two-Factor Authentication:** Admin users can enable two-factor authentication for both web and mobile app access using either an encryption key or hardware token.
- **Robustness of Security Protocols:** The system security meets the needs of large, international, or security-conscious foundations and corporations.
- **Non-Retrieveable Documents:** Documents saved within the mobile app for offline reading can be completely deleted from the user's device when access to the system is revoked. It is not possible to delete or revoke access to documents that have been downloaded to a user's computer.

System Administration

- **Login History:** Admin users can run a report to see when users have last logged into the portal.
- **Summary of Usage:** Admin users can run a report in the Administration section to see a summary of overall user access.
- **System Backup:** The vendor backs up all client data to two redundant data centers.
- **Exporting System Data:** All user data and files can be exported in their original formats by an admin user.

Support and Training

- **User Support:** The vendor provides 24/7 phone, email, and online user support, tailored for board member users.
- **User Documentation:** The vendor provides online training videos, live online or in-person training, and written documentation tailored for board member users. Admin users can edit or customize the written documentation.
- **Manuals and Documentation:** The vendor provides online training videos, live online or in-person training, and written documentation tailored for admin users.
- **Training:** The vendor provides online training videos and live online or in-person training for both board member and admin users.
- **Migration:** The vendor can provide migration assistance for new clients, including uploading documents into the system, at additional cost.

Product Background

- **History:** The vendor has been in business since 1996. BoardEffect has been in use since 2007.
- **Clients:** The vendor reports around 1,200 North American clients for this system. Approximately 10 percent of those are foundations.
- **Sustainability:** The vendor reports that the revenue earned from this system covers the personnel and operational expenses required to support it.

Usability

- **Ease of Use—Board Members:** The iPad app for the system is well laid out and easy to use. Navigation and menu items are prominently located, labeled intuitively, and large enough to effectively use on the touchscreen. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons. The web interface for the system is straightforward and navigation and menu items are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be found on the user dashboard. As of report publication, the vendor has released an updated user interface, with upcoming meetings, board books, and “Workrooms” (i.e., committees) located more prominently.
- **Ease of Use—Administrators:** The admin interface is straightforward and navigation and menu items are prominently and intuitively labeled. Creating a new meeting or board book is mostly intuitive, but may require several steps or screens for uploading documents. Many settings for meetings and board books, such as privacy settings, pagination, and style and layout options, are controlled through checkboxes and drop-down menus. As of report publication, the vendor has released an updated user interface with a more streamlined process for creating board books, including a drag-and-drop interface for uploading or arranging documents on a single screen.

BOARDVANTAGE

Boardvantage provides solid support for creating and managing board books and other meeting documents, with an easy-to-use interface that allows mobile users to read and annotate documents, access annotations across a variety of devices, and share annotations with other system users. Creating a board book is a straightforward process, and while the tool makes it simple to upload a variety of documents to include in a board book, linking the documents to an agenda or Table of Contents is a more manual process. The tool makes it easy to replace documents with updated versions, and Word, Excel, and PowerPoint documents can be edited within the system. The desktop interface is similar to an intranet or SharePoint site, with smaller fonts and sometimes hidden contextual menus in the Repository module. Board members have quick access to important documents, meetings, approvals, surveys, and a briefcase for storing favorite documents. The Approval and Survey modules are very easy to use and official approvals can even include board signatures. Present mode in the Meetings module allows for a level of online conferencing so that presenters can guide meeting participants' views of meeting materials. There is also the capability for online discussions within meetings. Pricing is based on the number of users and license type.

- **Pricing—Small Boards:** Pricing is based on the number of users and license type. The approximate cost for 10 users and 1 admin is \$12,000 per year.
- **Pricing—Mid-Size Boards:** Pricing is based on the number of users and license type. The approximate cost for 20 users and 2 admins is \$26,000 per year.
- **Pricing—Large Boards:** Pricing is based on the number of users and license type. The approximate cost for 40 users and 10 admin is \$51,000 per year.

Reading and Annotating Documents

- **Document Quick Search:** Users can easily find and navigate through documents in a board book using the search tool in the toolbar at the top of the page.
- **Searching Document Text—Within Document:** Lets you search the text of a board book for a specific word or phrase, using the built-in search functionality.
- **Searching Document Text—All Documents:** Lets you search the text of all documents in the board portal for a specific word or phrase, using the built-in search functionality.
- **File Format:** Lets you view documents in a familiar PDF format.
- **Document Formatting:** Electronic documents look exactly the same as a printed version of the board book.
- **URLs in the Document:** You can click on links in the document text to open a page or a file.
- **Documents From Past Meetings:** Documents from past meetings are stored in the Repository Module.
- **Printing the Board Book:** Lets you print the entirety of the board book if print functionality is enabled.
- **Printing Excerpts:** Lets you print out specific sections or pages of the board book if print functionality is enabled.
- **Table of Contents:** The Table of Contents does not support a drill-down module. Links to documents must be added manually. If there are numerous documents in a section, you can group them together and then link to the group.

- **Document Bookmarks:** Board members can bookmark a page in the board book, to easily return to for later reading.
- **Document Annotation—Writing Notes in a Document:** Lets board members add a note that they can see next to a particular piece of text in the document.
- **Document Annotation—Summary of Notes:** Lets board members see all the notes they've made in a “notes view” rather than having to page through the whole document.
- **Document Annotation—Searching Within Notes:** Board members can see a list of annotations by page number or user, but cannot search their own notes in a document.
- **Document Annotation—Marking Up Text:** Lets board members highlight or strike through text in a document, or draw free hand notes.
- **Document Annotation—Method:** Lets you annotate board book documents using functionality embedded in the tool itself.
- **Document Annotation—Integration:** The software does not allow for linking to third party software or databases.

Calendars

- **Calendar of Meetings:** Board members can see a calendar of all their upcoming grant and committee meetings on the user dashboard.
- **Calendar of Deliverables:** Board members can see a list of upcoming deliverables on their calendar if they are created as “appointments.”
- **Calendar Customization:** Board members cannot customize their calendar. Board members cannot choose which calendars to display.
- **Scheduling a Meeting Time:** Admins can send out a survey to board members regarding meeting scheduling, but this does not integrate with the Calendar function.
- **Calendar Integration:** Users can add meetings and events to Microsoft Outlook or other calendar clients through .ics files attached to meeting Alerts.

Creating Board Books

- **Board Book Assembly:** Lets you associate all the documents for a board meeting, by uploading documents or selecting existing documents from the Repository and include them in the board book through a simple drag-and-drop process.
- **Creating a Table of Contents:** You can create a Table of Contents for board book items.
- **Reusing Table of Contents:** You can copy previous agendas and use them for new meetings.
- **Arranging Board Book Documents:** You can easily re-order documents for a board book one at a time through a drag-and-drop interface, but you would need to manually change the Table of Contents or agenda to reflect those changes.
- **Uploading Files to Board Book:** You can upload files individually, upload multiple files, or upload entire folders and specify the order when creating the board book. The system automatically generates unique page numbers for the documents within the board book.
- **Bulk Uploading of Files to Board Book:** Lets you easily upload entire folders and subfolders at one time, and maintains the folder structure.
- **Meeting Agenda:** You can add a meeting agenda to a board book.
- **Updating Uploaded Documents:** You can easily update a document in the board book by using the “replace” function.

- **Syncing Updated with Offline Copies:** All documents are synced automatically when a user logs into the system.
- **Preserving Annotations:** Replacing a document preserves and carries over annotations from the previous version(s).
- **File Formats for Upload:** Lets you easily incorporate Microsoft Word, Excel and PowerPoint documents, PDF, and image files into board book packets.
- **Preserving Original Formatting:** Lets you incorporate documents with complex formatting, including chapters and columns, into board book packets.
- **Draft Versions:** Lets you save a board book in progress as a draft version to restrict board members from accessing it until the meeting is activated.
- **Workflow/Editorial Controls:** There is no automated workflow for editorial approval of documents or board books.
- **Importing Grant Reports:** The software does not allow for linking to third party software or databases.
- **Multiple Meeting Documents:** Lets you publish multiple board books for one board meeting (i.e. for committee meetings), and set permissions by version to restrict access to specific committees or groups.
- **Archiving:** Board books can be archived within the Repository Module. Archived books retain annotations, unless organization policy requires otherwise.

Organizing Other Documents

- **Organization Structure:** Lets you create folders to store documents that aren't associated with meetings (e.g. bylaws).
- **File Hierarchy:** Lets you create an unlimited number of levels of folders to organize documents.
- **Uploading Other Documents:** Lets you upload and easily view documents associated with a meeting that aren't in the board book (e.g. meeting minutes) in the Repository.
- **Saving Documents in Multiple Locations:** Lets you upload a particular document to a particular a folder in the system, and link to that file in a board book.

Collaboration

- **Official Voting:** Lets a board take an official board vote within the portal, using the Approval function. Votes can even include electronic signatures. There is no distinction in the system functionality between official and informal voting or polls.
- **Informal Polling:** Lets a board take a non-official vote or poll within the portal, using the Approval function. There is no distinction in the system functionality between official and informal voting or polls.
- **Board Surveys:** Lets a board take a longer survey through the survey module.
- **Anonymous Voting:** Lets a board take an anonymous vote if the admin chooses not to display responses, but the admin sees what the board members votes are.
- **Call-to-Vote:** A board member can setup a call-to-vote or poll, if granted access to the Approval module.
- **Shared Annotations:** Lets a board member share their notes with another board member, group or with everyone.
- **Collaborative Editing:** Does not let multiple users edit the same document collaboratively in real-time.
- **Email Notifications:** Sends board member email alerts when a board book is ready and/or updated. An admin can also send secure notification that says there is an update in the board portal, but without a link.
- **Capturing Email Threads:** Does not let board members capture in the portal email discussions from outside the system.
- **Discussion Digest:** Does not provide a daily email digest of portal discussions to board members.

- **Proposal Evaluation:** There is no dedicated functionality to facilitate board members rating or scoring individual grant proposals within the portal, but the vendor reports that the Approval functionality could be used for this purpose.
- **Document Versioning:** Replacing a document in the system will not overwrite the previous uploaded version. Admins can access versions from the document menu. System indicates who is editing a document when it is in use.

Mobile Usability

- **Mobile Usability—iOS:** The iPad app for the system is well laid-out and easy to use. Navigation and menu items are prominently located and large enough to effectively use on the touchscreen, and labeled intuitively. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons.
- **Mobile Usability—Android, Windows, Other Mobile OS:** There is limited functionality on Surface tablets and Android phones. Board members can only view and annotate documents on these devices.
- **Desktop Usability:** The web interface for the system is similar to that of many intranet tools or Sharepoint sites. Fonts are small, and most of the key actions within the Repository are contained in context-specific menus that are accessed through arrows that appear to the right of items when you highlight them. Admins can push items of importance to board members through a variety of modules (New Items, Briefcase, Meetings and Calendar) and board members are trained that they should focus on documents and meetings in those areas of the site.
- **Mobile Access—Smartphones:** The iPhone app contains all the features and functions of the iPad app. There is limited functionality on Android phones, only allowing board members to view and annotate documents.
- **Annotating on Mobile Devices:** The system syncs annotations across all devices.
- **Offline Access:** Lets you access documents on a mobile device for offline viewing. This is not available from the web-based version of the software.

Use in Board Meetings

- **Multiple Presenters:** The system allows for presentations during board meetings with Present Mode in the Meeting Module. Presenter control can be passed from attendee to attendee.
- **Facilitated Reading:** In Present mode, a meeting facilitator can control all board members' view of the board book on their individual tablets or laptops to a particular page.
- **Chat:** Board members can communicate within a meeting through a discussion wall, where board members can post and others can comment.
- **Online Conferencing and Presentation Tools:** The system allows for some online conferencing functionality, using Present Mode in the Meeting Module.
- **Managing Documents for Policy-Based Governance:** Grant Reports can be linked to board books as a non-agenda items for users' reference before, during and after meetings or can be uploaded and distributed individually or as groups by the administrator at any time as often as necessary throughout the year.

Security and Access Management

- **Security Settings:** Admin users can specify security settings for users and by folder or document.
- **Secure File Format:** Board documents are stored in the system as proprietary PDF files.
- **Download Permissions:** Lets you prevent users from downloading or printing a board book or other document.
- **Password-Protected Folders:** Lets you create specify access privileges for folders by group or by individual.
- **Board-Only Folder Access:** Lets you setup folders to store documents that certain admins cannot access, by creating different levels of admin users, but the overall system owner retains the ability to see all folders.

- **Single Sign-On:** A board member using the tool for a different board can use the same log in information for both boards, provided the administrators at both organizations agree to this.
- **Two-Factor Authentication:** Standard two-tier authentication consists of a unique user name and password as well as rolling security questions. Other forms of second tier authentication include SMS, Touch ID and PIN Code. Admins can disable two-factor authentication if they choose.
- **Robustness of Security Protocols:** The system security meets the needs of large, international or security conscious foundations or corporations.
- **Non-Retrieveable Documents:** Documents available for offline reading on the mobile app can be called back or purged from devices by an administrator.

System Administration

- **Login History:** The system does not provide this functionality in order to limit liability exposure.
- **Summary of Usage:** The system does not provide this functionality in order to limit liability exposure. Admin users can see a report of changes made to individual documents.
- **System Backup:** The vendor backs up all client data to two redundant data centers on the west and east coasts, as well as European and Asian servers for global clients.
- **Exporting System Data:** All files can be exported by an admin user, in their original formats, through a tool available in the system.

Support and Training

- **User Support:** The vendor provides 24/7 phone, email, and online user support, tailored for board member users. Admins receive one-on-one training with an Account Manager, as well as access to guides, videos, Quick References, and 24/7 support via phone or email.
- **User Documentation:** The vendor provides user guides updated with each new release, and customized for users only, as well as training videos, client testimonials and white papers.
- **Manuals and Documentation:** The vendor provides user guides updated with each new release, and customized for users only, as well as training videos, client testimonials and white papers.
- **Training:** The vendor provides an onboarding specialist to train board members during the implementation process and for new board members after implementation.
- **Migration:** The customer is responsible for all data migration.

Product Background

- **History:** The vendor has been in business since 2004.
- **Clients:** Vendor reports around 1,700 clients for this system, 55 of which are foundations.
- **Sustainability:** The vendor reports that the revenue earned from this system covers the personnel and operational expenses required to support it.

Usability

- **Ease of Use—Board Members:** The iPad app for the system is well laid-out and easy to use. Navigation and menu items are prominently located and large enough to effectively use on the touchscreen, and labeled intuitively. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons. The web interface for the system is similar to that of an intranet or Sharepoint, with smaller fonts and text-based rather than graphic. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be pushed to users' briefcases.

- **Ease of Use— Administrators:** The admin interface for the system is similar to that of many intranet tools or Sharepoint sites. Fonts are small, and most of the key actions within the Repository are contained in context-specific menus that are accessed through arrows that appear to the right of items when you highlight them. Creating a new meeting is easy, as is uploading files for a board book, but the process of assembling the board book involves manual linking of files to agenda or Table of Contents. Many settings for meetings and board books, such as privacy settings, pagination, and style and layout options, are controlled through checkboxes and drop-down menus.

DILIGENT BOARDBOOKS

As one of the most established systems on the market, Diligent Boardbooks provides solid functionality for organizations that need granular permission settings or editorial controls over their meeting documents. The system provides robust workflow for board books, including automated notifications for internal review and a multi-step approval process that allows directors to add notes on what needs to change for approval. The iPad and Windows 8.1 apps for the system are easy-to-use and intuitively labeled, with a modern interface; the online version is labeled clearly and intuitively, but the interface itself—which is designed to resemble a physical notebook—is straightforward but dated. The voting functionality for official board votes is well thought-out, allowing board members to add their e-signatures to approve a specific document, but as an admin user must add a signature block for each voting board member directly to the document, this functionality may be less well-suited for spontaneous votes or informal straw polls. There is no internal chat or presentation functionality provided in the system—as with many other board portal solutions, you’ll need to use third-party chat or online conferencing tools if that is important to your organization. Licensing costs are based on annual user fees, starting at \$6,800 per year for North American nonprofits—including training, support, and data—in addition to the cost of implementation.

- **Pricing—Small Boards:** Averaging \$6,800 per year for a nonprofit organization, plus an initial implementation fee of \$1,000. Annual cost includes unlimited consultation, account management services, live help-desk support, and data storage.
- **Pricing—Mid-Size Boards:** Averaging \$15,500 per year for a nonprofit organization, plus an initial implementation fee of \$2,300. Annual cost includes unlimited consultation, account management services, live help-desk support, and data storage.
- **Pricing—Large Boards:** Averaging \$30,900 per year for a nonprofit organization, plus an initial implementation fee of \$4,600. Annual cost includes unlimited consultation, account management services, live help-desk support, and data storage.

Reading and Annotating Documents

- **Document Quick Search:** You can easily find and navigate through documents in a board book using the prominently-located search tool in the user navigation menu, the links in the meeting agenda, or the navigation menu.
- **Searching Document Text—Within Document:** Lets you search the text of a board book for a specific word or phrase by using the built-in search functionality.
- **Searching Document Text—All Documents:** Lets you search the text of all documents in the board portal for a specific word or phrase by using the built-in search functionality.
- **File Format:** Lets you view documents in a familiar ebook format.
- **Document Formatting:** Electronic documents look exactly the same as a printed version of the board book.
- **URLs in the Document:** When board members click on a link in a document, it opens as a new tab in the browser.
- **Documents From Past Meetings:** Board members can easily navigate to documents from a past board meeting by navigating to the “Archived Books” section of either the web or mobile interface.
- **Printing the Board Book:** Lets you print out the entirety of the board book.

- **Printing Excerpts:** Lets you print out specific sections or pages of the board book.
- **Table of Contents:** The Table of Contents supports a drill-down model of automatically linking to sub-sections.
- **Document Bookmarks:** Lets board members bookmark a page in the board book allowing them to easily return to that page for later reading.
- **Document Annotation—Writing Notes in a Document:** Lets board members add a note that they can see next to a particular piece of text in the document.
- **Document Annotation—Summary of Notes:** Lets board members see all the notes they've made in a "notes view" rather than having to page through the whole document.
- **Document Annotation—Searching Within Notes:** Does not currently let a board member search the full text of the board member's own notes in a document.
- **Document Annotation—Marking Up Text:** Lets board members highlight, but not strikethrough text or draw freehand notes, in a document.
- **Document Annotation—Method:** Lets you annotate board book documents using functionality embedded in the tool itself.
- **Document Annotation—Integration:** Does not let you choose the PDF annotation software that you want to use for reading and annotating documents. Due to the proprietary encryption used by the system, documents that have been downloaded to a user's computer can only be accessed with the user's log-in credentials.

Calendars

- **Calendar of Meetings:** Board members can see a calendar of all their upcoming grant and committee meetings. The navigation item for this functionality is located prominently on the user dashboard.
- **Calendar of Deliverables:** The system calendar does not provide a task functionality with due dates. Users could possibly use the questionnaire functionality to accomplish this.
- **Calendar Customization:** By default, users only see events assigned to the groups to which they belong. Users do not have the ability to view other users' personal calendars.
- **Scheduling a Meeting Time:** Does not let you send out a scheduling survey to board members to find a time and automatically confirm availability onto the calendar. Users could possibly use the questionnaire functionality to accomplish this.
- **Calendar Integration:** Lets a board member sync calendar events with a personal Microsoft Outlook calendar.

Creating Board Books

- **Board Book Assembly:** Lets you associate all the documents for a board meeting by building out the agenda and uploading documents or linking to existing documents from the Resource Center. Users can either create a board book from scratch or copy and rename an existing board book.
- **Creating a Table of Contents:** The system creates the Table of Contents automatically. Lets you create a meeting agenda by either uploading all meeting documents in bulk or by manually uploading or linking to individual documents.
- **Reusing Table of Contents:** Lets you reuse the structure of the Table of Contents from a previous board book by copying and renaming an existing board book.
- **Arranging Board Book Documents:** Lets you easily reorder documents for a board book using a drag-and-drop interface either by reordering the sections of the board book or by reordering each document one at a time within a single section.
- **Uploading Files to Board Book:** Lets you upload all the many documents for a board book in a specific order, and generates unique page numbers for them.
- **Bulk Uploading of Files to Board Book:** Lets you easily upload many documents from one folder to the board book and reorder them through a drag-and-drop interface.

- **Meeting Agenda:** It's possible to create an easy to see agenda which is separate from the Table of Contents.
- **Updating Uploaded Documents:** Lets an admin user upload a new version of a document into the board book after the board book is published.
- **Syncing Updated with Offline Copies:** The iPad app will notify users when a new version of a document that has been downloaded for offline reading is now available.
- **Preserving Annotations:** Uploading a new version of a document preserves and carries over a previous version's sticky note annotations, but not freehand notes or highlighted text.
- **File Formats for Upload:** Lets you easily incorporate Microsoft Word, PowerPoint, Excel, and PDF files into board book packets. Other file formats must be converted to PDF in order to upload to the board book packet.
- **Preserving Original Formatting:** Lets you incorporate Microsoft Word documents with complex formatting, including chapters and columns, into board book packets.
- **Draft Versions:** Lets you save a board book in progress as a draft version to restrict board members from accessing it until it is ready to be published.
- **Workflow/Editorial Controls:** Provides an automated workflow for creating board books, including email notifications to admin users who need to approve each document. Included in the approval process is the opportunity for multiple levels of approval and the ability to create notes for other admin users.
- **Importing Grant Reports:** Lets you import documents from a grants management system report as you would any other file.
- **Multiple Meeting Documents:** Lets you restrict access by individual user or group to specific documents within the board book.
- **Archiving:** Lets admin users easily archive board books after a meeting by saving the book as "archived." Admin users can choose whether or not archived board books retain annotations.

Organizing Other Documents

- **Organization Structure:** Lets you create folders to store documents that aren't associated with meetings (e.g., bylaws).
- **File Hierarchy:** Lets you create an unlimited number of levels of folders to organize documents.
- **Uploading Other Documents:** Lets you upload and easily view documents associated with a meeting that aren't in the board book (e.g., meeting minutes) as part of the Resource Center. Documents can be organized into sections in a similar manner to the meeting agenda, but there is no bulk upload functionality for Resource Center documents.
- **Saving Documents in Multiple Locations:** Lets you upload a particular document to a particular a folder in the system and link to that file in a board book.

Collaboration

- **Official Voting:** Lets a board take an official board vote within the portal, complete with electronic signatures for board members voting in favor of a resolution, on any document in the board book.
- **Informal Polling:** Lets the board take an unofficial vote or poll using either the voting or questionnaire functionality. There is no distinction in the system functionality between official and informal voting or polls.
- **Board Surveys:** Lets the board take a longer survey, such as a self-assessment.
- **Anonymous Voting:** Lets the board take either an anonymous or non-anonymous vote or poll.
- **Call-to-Vote:** As the voting functionality must be added to a meeting document directly, only an admin user can set up a call-to-vote or poll within the system.
- **Shared Annotations:** As of report publication, lets a board member share notes with all users in a group, but not by individual. The vendor reports that this feature will be available in Q2 of 2015.

- **Collaborative Editing:** Does not let multiple users edit the same document collaboratively in real time.
- **Email Notifications:** Sends board member email alerts when a board book is ready and/or updated.
- **Capturing Email Threads:** Email discussions from outside the system can be captured in the portal by uploading them to the resource center as a Microsoft Word document.
- **Discussion Digest:** Does not provide a daily email digest of portal discussions to board members.
- **Proposal Evaluation:** There is no dedicated functionality to facilitate board members rating or scoring individual grant proposals within the portal, but the vendor reports that the questionnaire functionality could be used for this purpose.
- **Document Versioning:** Provides version control for documents, if multiple people are editing the same document, by creating separate copies for each user. Users can merge the two versions to choose which changes to keep or discard.

Mobile Usability

- **Mobile Usability—iOS:** The iPad app for the system is well laid out and easy to use. Navigation and menu items are prominently located, labeled intuitively, and large enough to effectively use on the touchscreen. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons.
- **Mobile Usability—Android, Windows, Other Mobile OS:** The Windows 8.1 app for the system is virtually identical to the interface for the iPad. There is no dedicated mobile interface for Android devices.
- **Desktop Usability:** The web interface for the system is straightforward but looks dated because it's designed to resemble a physical book or organizer. Navigation and menu items are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be found on the user dashboard. Creating a new meeting or board book is mostly intuitive, but it may require several steps to organize the documents, which may cause a longer learning curve for novice users.
- **Mobile Access—Smartphones:** There is no dedicated mobile interface for smartphones.
- **Annotating on Mobile Devices:** The system can sync annotations between the apps and the web interface.
- **Offline Access:** Lets you download documents to a computer or mobile device for offline viewing.

Use in Board Meetings

- **Multiple Presenters:** As the system does not include online conferencing functionality, there is no presenter role.
- **Facilitated Reading:** The system does not provide functionality that would allow a meeting facilitator to control all board members' views of the board book on their individual tablets or navigate the board member to a particular page.
- **Chat:** Does not provide functionality to let board members participate in an online chat within the portal.
- **Online Conferencing and Presentation Tools:** Does not include online conferencing functionality to facilitate virtual board meetings.
- **Managing Documents for Policy-Based Governance:** Allows you to link to an uploaded document from the Resource Center in a board book instead of making a new copy of the document.

Security and Access Management

- **Security Settings:** Admin users can specify security settings for users and can potentially to turn off all security features except a single-factor login.
- **Secure File Format:** Board documents are stored in the system as PDF files with a proprietary encryption method.

- **Download Permissions:** Lets you prevent users from downloading, printing, or emailing a board book or other document.
- **Password-Protected Folders:** Lets you limit access to specific folders by individual user or group of users (for example, members of a specific committee).
- **Board-Only Folder Access:** Lets you set up folders to store documents that the system admin cannot access through additional levels of admin use.
- **Single Sign-On:** A board member using the tool for multiple boards can use the same login information.
- **Two-Factor Authentication:** Admin users can enable two-factor authentication for both web and mobile app access by creating security questions.
- **Robustness of Security Protocols:** The system security meets the needs of large, international, or security conscious foundations or corporations.
- **Non-Retrieveable Documents:** Documents saved within the mobile app for offline reading can be completely deleted from the user's device when access to the system is revoked. Due to the proprietary encryption used by the system, documents that have been downloaded to a user's computer can only be accessed with the user's log-in credentials.

System Administration

- **Login History:** As the system does not record user access, admin users cannot see a login history for users.
- **Summary of Usage:** As the system does not record user access, admin users cannot see a summary of overall user access.
- **System Backup:** The vendor backs up all client data to two redundant data centers.
- **Exporting System Data:** All user data and files can be exported in their original formats by an admin user.

Support and Training

- **User Support:** The vendor provides 24/7 phone and online user support and training, tailored for board member users, at no additional cost.
- **User Documentation:** The vendor provides live online training and written documentation tailored for board member users. Admin users can edit or customize the written documentation.
- **Manuals and Documentation:** The vendor provides live online training and written documentation tailored for admin users.
- **Training:** The vendor provides live online or in-person training for both board member and admin users.
- **Migration:** The vendor can provide migration assistance for new clients, including uploading documents into the system, at additional cost.

Product Background

- **History:** Diligent Board Member Services, Inc. has been a publicly-traded company since 2007. Diligent Board-books has been in use since 2002.
- **Clients:** The vendor reports that over 30 percent of the Fortune 1000 and 40 percent of the Canadian ROB companies use the system. More than 100 clients in North America are foundations.
- **Sustainability:** The vendor reports that the revenue earned from this system covers the personnel and operational expenses required to support it.

Usability

- **Ease of Use—Board Members:** The tablet interface for the system is well laid out and easy to use. Navigation and menu items are prominently located, labeled intuitively, and large enough to effectively use on the touchscreen. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons. The web interface for the system is straightforward but looks dated since it is designed to resemble a physical book or organizer. Navigation and menu items are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be found on the user dashboard.
- **Ease of Use—Administrators:** The admin interface is straightforward but looks dated since it is designed to resemble a physical book or organizer. Navigation and menu items are prominently and intuitively labeled. Creating a new meeting or board book is mostly intuitive, but it may require several steps to organize the documents, which may cause a longer learning curve for novice users. Users can create a board book by adding files to a folder within the system or by uploading a bookmarked PDF document—the system automatically converts those bookmarks into sections for the meeting agenda and navigation menu.

DIRECTORS DESK

Directors Desk is a full-featured tool that allows organizations to manage most aspects of board collaboration and governance, including scheduling board meetings, creating and managing board books and other meeting documents, managing meeting activities, and tracking board participation and preparedness. The iPad app provides access to nearly all of the portal's board-facing functionality, including reading and annotating documents, voting, document libraries, and messaging. Creating a board book is a straightforward process in which an admin creates a section and then links associated documents to the section. Documents can be replaced and annotations are carried over into new version(s). The web interface for the system contains two separate navigation menus with tabs for different tools across the top, and contextual action items to the left. The vendor reports that the web interface colors can be customized. The dashboard contains a list of new items and upcoming meetings and events. The Voting and Survey functions are very easy to use and official votes can even include board signatures. Board members can use the tool for presentations, and it integrates with third-party conferencing tools. Users can email each other through the system or participate in discussions on the site, but there is no chat capability. Pricing for the system is an annual fee and scales based on the number of users who need access to the site, but the vendor declined to provide further details..

- **Pricing—Small Boards:** The vendor has declined to provide pricing for the system.
- **Pricing—Mid-Size Boards:** The vendor has declined to provide pricing for the system.
- **Pricing—Large Boards:** The vendor has declined to provide pricing for the system.

Reading and Annotating Documents

- **Document Quick Search:** Users can easily find and navigate through documents in a board book using the built-in search functionality.
- **Searching Document Text—Within Document:** Lets you search the text of a board book for a specific word or phrase, using the built-in search functionality.
- **Searching Document Text—All Documents:** Lets you search the text of all documents in the board portal for a specific word or phrase using the built-in search functionality.
- **File Format:** Lets you view documents in their native file format or a familiar PDF format.
- **Document Formatting:** Electronic documents look the same as a printed version of the board book.
- **URLs in the Document:** When board members click on a link in a document, it opens as a new tab in the browser.
- **Documents From Past Meetings:** Documents from past meetings are stored in the Documents section of the tool.
- **Printing the Board Book:** Lets you print the entirety of the board book if print functionality is enabled.
- **Printing Excerpts:** Lets you print out specific sections or pages of the board book if print functionality is enabled.
- **Table of Contents:** The Table of Contents supports a drill-down model of automatically linking to sub-sections.
- **Document Bookmarks:** Board members cannot bookmark a page in the board book to return to for later reading, but can add an annotation to mark the page.

- **Document Annotation—Writing Notes in a Document:** Lets board members add a note that they can see next to a particular piece of text in the document.
- **Document Annotation—Summary of Notes:** Lets board members see all the notes they've made in a "notes view" rather than having to page through the whole document.
- **Document Annotation—Searching Within Notes:** Board members cannot search their own notes in a document.
- **Document Annotation—Marking Up Text:** Lets board members highlight or strike through text in a document, or draw free hand notes.
- **Document Annotation—Method:** Lets you annotate board book documents using functionality embedded in the tool itself.
- **Document Annotation—Integration:** Lets you choose to use Adobe Acrobat Reader to read and annotate documents.

Calendars

- **Calendar of Meetings:** Board members can see a calendar of all their upcoming grant and committee meetings on the user dashboard.
- **Calendar of Deliverables:** Board members can see a list of upcoming deliverables on their calendar if they are created as events.
- **Calendar Customization:** Board members cannot customize their calendar, but can select from one of three display formats. Board members cannot choose which calendars to display.
- **Scheduling a Meeting Time:** Does not currently let you send out a meeting scheduling survey to board members to find a time to schedule a meeting and automatically confirm availability onto the calendar, but this can be done manually with the survey tool on the portal. The vendor reports that an update to the system that will provide this functionality will be available in May 2015.
- **Calendar Integration:** Users can sync meetings and events with Microsoft Outlook and iCal programs.

Creating Board Books

- **Board Book Assembly:** Lets you associate all the documents for a board meeting by uploading documents or selecting existing documents from the Documents section and linking them to sections of the board book.
- **Creating a Table of Contents:** The portal automatically creates a Table of Contents when creating the book.
- **Reusing Table of Contents:** Lets you copy the structure of the meeting agenda from a previous board book using the layout template functionality.
- **Arranging Board Book Documents:** You can re-order documents for a board book by using the move option on the contextual menu.
- **Uploading Files to Board Book:** You can upload files individually or in a group and link them to the relevant section when creating the board book. The system automatically generates unique page numbers for the documents within the board book.
- **Bulk Uploading of Files to Board Book:** Lets you easily upload many documents to the board book and reorder them through a drag-and-drop interface.
- **Meeting Agenda:** You can add an agenda item as a section and upload a meeting agenda to attach to that section.
- **Updating Uploaded Documents:** You can update a document in the board book by choosing the edit option and then the option to upload a newer version.
- **Syncing Updated with Offline Copies:** The system notifies users, via an announcement feature, when a new version is available for download.
- **Preserving Annotations:** Annotations are carried over into new versions of documents.

- **File Formats for Upload:** Lets you easily incorporate Microsoft Word, Excel and PowerPoint documents, .PDF, and image files into board book packets.
- **Preserving Original Formatting:** Lets you incorporate documents with complex formatting, including chapters and columns, into board book packets.
- **Draft Versions:** Lets you save a board book in progress as a draft version to restrict board members from accessing it.
- **Workflow/Editorial Controls:** The system provides an automated workflow for adding documents to a board book. Users can upload and suggest documents to include in the board book, and notify admin users that need to approve each document.
- **Importing Grant Reports:** You can upload a grant report as you would any other document.
- **Multiple Meeting Documents:** Lets you publish multiple board books for one board meeting (i.e. for committee meetings), and set permissions by version to restrict access to specific individuals, committees, or groups.
- **Archiving:** Board books are automatically archived after meetings and retained for an admin-specified period of time. Admins can elect to hide annotations from archived board books.

Organizing Other Documents

- **Organization Structure:** Lets you create folders to store documents that are not associated with meetings (e.g. bylaws).
- **File Hierarchy:** Lets you create an unlimited number of levels of folders to organize documents.
- **Uploading Other Documents:** Lets you upload and easily view documents associated with a meeting that are not in the board book (e.g. meeting minutes).
- **Saving Documents in Multiple Locations:** Lets you upload a particular document to a particular a folder in the system, and link to that file in a board book.

Collaboration

- **Official Voting:** Lets a board take an official board vote within the portal. Votes can even include electronic signatures. There is no distinction in the system functionality between official and informal voting or polls.
- **Informal Polling:** Lets a board take a non-official vote or poll within the portal. There is no distinction in the system functionality between official and informal voting or polls.
- **Board Surveys:** Lets a board take a longer survey in the Surveys section.
- **Anonymous Voting:** Lets a board take an anonymous vote if the admin chooses not to display responses, but the admin sees what the board members' votes are.
- **Call-to-Vote:** A board member can set up a call-to-vote or poll, if granted Vote Master privileges.
- **Shared Annotations:** Lets a board member share individual pages and assign annotations to another board member.
- **Collaborative Editing:** Does not let multiple users edit the same document collaboratively in real-time.
- **Email Notifications:** Provides the option to send board member email alerts when a board book is ready and/or updated.
- **Capturing Email Threads:** Does not let board members capture in the portal email discussions from outside the system.
- **Discussion Digest:** Does not provide a daily email digest of portal discussions to board members. New items to review are located in the Hot Topics section of the Document Center.
- **Proposal Evaluation:** There is no dedicated functionality to facilitate board members rating or scoring individual grant proposals within the portal, but the vendor reports that the Surveys functionality could be used for this purpose.

- **Document Versioning:** Uploading a new version of a document to the portal automatically archives the previous uploaded version.

Mobile Usability

- **Mobile Usability—iOS:** The iPad app for the system is well laid-out and easy to use. Navigation and menu items are prominently located and large enough to effectively use on the touchscreen, and labeled intuitively. Annotation and navigation buttons within a document are clearly visible at the top of the screen.
- **Mobile Usability—Android, Windows, Other Mobile OS:** The Windows 8.1 app for the system is virtually identical to the interface for the iPad. There is no dedicated mobile interface for Android devices.
- **Desktop Usability:** The web interface for the system contains two separate navigation menus with tabs for different tools across the top, and contextual action items to the left. The vendor reports that the web interface colors can be customized. The dashboard contains a list of new items and upcoming meetings and events.
- **Mobile Access—Smartphones:** The vendor reports that there is a mobile version of the web interface available for smartphone users.
- **Annotating on Mobile Devices:** The system syncs annotations across all devices.
- **Offline Access:** Lets you download documents to a computer or mobile device for offline viewing.

Use in Board Meetings

- **Multiple Presenters:** The system allows for multiple presenters with a Presenter mode feature.
- **Facilitated Reading:** The system allows the presenter to control the display on attendees' devices.
- **Chat:** The system does not provide online chat functionality. Board members can participate in online discussions or send secure email messages in the system.
- **Online Conferencing and Presentation Tools:** The system can integrate with third-party online conferencing tools.
- **Managing Documents for Policy-Based Governance:** Grant Reports can be linked to board books as any other document in the system.

Security and Access Management

- **Security Settings:** Organizations can turn off security settings they do not want with the potential to turn off all security features except a single-factor login.
- **Secure File Format:** Documents stored in the system are encrypted.
- **Download Permissions:** The system lets you prevent users from downloading or printing a board book or other document.
- **Password-Protected Folders:** Access to folders can be restricted by group or user.
- **Board-Only Folder Access:** Folder access rights can be set to restrict individual admin users from accessing specific folders or documents.
- **Single Sign-On:** A board member using the tool for a different board can use the same log in information for both boards.
- **Two-Factor Authentication:** Standard two-tier authentication consists of a unique user name and password as well as a keyfob or a PIN that a user enters into a scrambled PIN pad.
- **Robustness of Security Protocols:** The system security meets the needs of large, international or security-conscious foundations or corporations.

- **Non-Retrieveable Documents:** Documents saved within the mobile app for offline reading can be purged from the user's device next time the user connects to the system.

System Administration

- **Login History:** Admins can see last log-in for all users.
- **Summary of Usage:** Admins can run a report showing log-ins, which documents board members have read, sessions and pageviews per person.
- **System Backup:** The vendor backs up all client data to at least two redundant data centers.
- **Exporting System Data:** All user data and files can be exported by an admin user, in their original formats or as PDF.

Support and Training

- **User Support:** The vendor provides 24/7 phone and email user support, at no additional cost.
- **User Documentation:** The vendor provides live online training, and written documentation tailored for board member users, at no additional cost.
- **Manuals and Documentation:** The vendor provides live online training and written documentation tailored for admin users at no additional cost.
- **Training:** The vendor provides live online training for both board member and admin users at no additional cost, and live in-person training for an additional fee.
- **Migration:** The vendor can provide migration assistance for new clients on a case-by-case basis, at no additional cost.

Product Background

- **History:** Directors Desk has been in business since 2003 and has been in use since that time. NASDAQ OMX Corporate Solutions acquired Directors Desk in 2007.
- **Clients:** The vendor reports more than 1,000 clients globally; of those, over 300 are foundations.
- **Sustainability:** The vendor reports that the revenue earned from this system covers the personnel and operational expenses required to support it.

Usability

- **Ease of Use—Board Members:** The iPad app for the system is well laid-out and easy to use. Navigation and menu items are prominently located across the bottom and large enough to effectively use on the touchscreen, and labeled intuitively. Annotation buttons within a document are clearly visible at the top of the document and intuitively labeled with graphic icons. The web interface for the system contains a dashboard that shows new content added to the system and upcoming events.
- **Ease of Use—Administrators:** The admin interface for the system contains two separate navigation menus with tabs for different tools across the top, and contextual action items to the left. Creating a new meeting and board book is easy, as is uploading files for a board book, and files are linked to section-by-section. Admins are able repurpose formats or outlines from previous meetings. Many settings for meetings and board books, such as privacy settings, pagination, and style and layout options, are controlled through checkboxes and drop-down menus.

PASSAGEWAYS ONBOARD

Originally developed for the financial sector, Passageways OnBoard provides a streamlined, easy-to-use platform for organizations that need solid functionality for creating and reading board books and other meeting documents. Both the iPad app and web interface for the system are well laid out and easy to use. Creating a board book is straightforward and intuitive process of building out the sections and agenda items through a drag-and-drop interface and uploading the related document to each section or agenda item. The voting functionality for official votes in a meeting is prominently located and easy enough to set up on the fly, but you'll need a third-party tool to create and conduct a survey or self-assessment of board members. In the spirit of streamlining the system for ease of use, there is no additional functionality to support online or virtual board meetings. If this is important to your organization, you'll likely need a third-party online conferencing tool. Pricing for the system starts at \$1,250 a year for up to 11 users for the Essential Edition, with an initial set-up fee of \$500.

- **Pricing—Small Boards:** \$1,250 annual recurring fee for up to 11 users (including one admin user). Service includes support, training, and unlimited data. An initial implementation fee of \$500 (after nonprofit discount) is also charged.
- **Pricing—Mid-Size Boards:** \$3,750 annual recurring fee for up to 25 users (including five admin users). Service includes support, training, and unlimited data. An initial implementation fee of \$2,000 (after nonprofit discount) is also charged.
- **Pricing—Large Boards:** \$6,000 annual recurring fee for up to 50 users (including 10 admin users). Service includes support, training, and unlimited data. An initial implementation fee of \$2,000 (after nonprofit discount) is also charged.

Reading and Annotating Documents

- **Document Quick Search:** You can easily find and navigate through documents in a board book using the prominently-located search tool in the user navigation menu or the links in the meeting agenda.
- **Searching Document Text—Within Document:** Lets you search the text of a board book for a specific word or phrase by using the built-in search functionality.
- **Searching Document Text—All Documents:** Lets you search the text of all documents in the board portal for a specific word or phrase by using the built-in search functionality.
- **File Format:** Lets you view documents in a familiar PDF format.
- **Document Formatting:** Electronic documents look exactly the same as a printed version of the board book.
- **URLs in the Document:** When board members click on a link in a document, it opens as a new tab in the browser.
- **Documents From Past Meetings:** Board members can easily navigate to documents from a past board meeting through the calendar functionality.
- **Printing the Board Book:** Lets you print out the entirety of the board book.
- **Printing Excerpts:** Lets you print out specific sections or pages of the board book.
- **Table of Contents:** The Table of Contents supports a drill-down model of automatically linking to subsections.

- **Document Bookmarks:** Board members can bookmark a page in the board book to easily return to for later reading.
- **Document Annotation—Writing Notes in a Document:** Lets board members add a note that they can see next to a particular piece of text in the document.
- **Document Annotation—Summary of Notes:** Lets board members see all the notes they've made in a "notes view" rather than having to page through the whole document.
- **Document Annotation—Searching Within Notes:** Lets a board member search the full text of the board member's own notes in a document.
- **Document Annotation—Marking Up Text:** Lets board members highlight, but not strikethrough, text in a document or draw freehand notes.
- **Document Annotation—Method:** Lets you annotate board book documents using functionality embedded in the tool itself.
- **Document Annotation—Integration:** Lets you choose the PDF annotation software that you want to use for downloaded/offline copies of documents only.

Calendars

- **Calendar of Meetings:** Board members can see a calendar of all their upcoming grant and committee meetings. This functionality is located prominently on the user dashboard.
- **Calendar of Deliverables:** There is no dedicated task list functionality for upcoming due dates for documents, but admin users can assign documents or agenda items to another user and include due dates, which can be viewed within that calendar entry.
- **Calendar Customization:** Does not let you customize the look and feel of the calendar or turn on and off what calendars are displayed. By default, you only see events assigned to the groups to which you belong.
- **Scheduling a Meeting Time:** Does not let you send out a scheduling survey to board members to find a time to schedule a meeting and automatically confirm availability onto the calendar.
- **Calendar Integration:** You can download meetings and events and manually import them to Microsoft Outlook or other email and calendar client.

Creating Board Books

- **Board Book Assembly:** Lets you associate all the documents for a board meeting by building out the agenda and uploading the related document to each section or agenda item. You can either create a board book from scratch or copy and rename an existing board book.
- **Creating a Table of Contents:** Lets you create a meeting agenda by building out the sections through a drag-and-drop interface and manually uploading or linking to individual documents.
- **Reusing Table of Contents:** Lets you reuse the structure of the meeting agenda from a previous board book by copying and renaming an existing board book.
- **Arranging Board Book Documents:** Lets you easily reorder documents for a board book through a drag-and-drop interface, either by reordering the sections of the board book or by reordering each document one at a time within a single section.
- **Uploading Files to Board Book:** Lets you upload documents for a board book in a specific order and automatically generate unique page numbers for the documents within the board book.
- **Bulk Uploading of Files to Board Book:** Does not let you upload multiple documents from one folder to the board book. Documents must be uploaded individually and can be reordered through a drag-and-drop interface.

- **Meeting Agenda:** It's not possible to create a Table of Contents that is separate from the meeting agenda except by creating sections of the meeting agenda without attachments or by downloading the agenda document and uploading it to the beginning of the board book.
- **Updating Uploaded Documents:** Lets an admin user upload a new version of a document into the board book after the board book is published.
- **Syncing Updated with Offline Copies:** The iPad app will notify users if a new version of a document that has been downloaded for offline reading is now available.
- **Preserving Annotations:** Uploading a new version of a document does not preserve annotations from the previous version(s).
- **File Formats for Upload:** Lets you easily incorporate Microsoft Word, PowerPoint, and Excel documents, and PDF files into board book packets.
- **Preserving Original Formatting:** Lets you incorporate Microsoft Word documents with complex formatting, including chapters and columns, into board book packets.
- **Draft Versions:** Does not let you save a board book in progress as a draft version. Board books in progress can be restricted to a subset of users with "reviewer" permissions until they are ready for full board review.
- **Workflow/Editorial Controls:** There is no automated workflow for editorial approval of documents or board books. Admin users can assign documents or agenda items to another user with due dates, control access to draft documents through the permissions functionality, and notify them through the system, but there is no dedicated approval functionality.
- **Importing Grant Reports:** Lets you import a grants management system report as you would any other file.
- **Multiple Meeting Documents:** Lets you restrict access to specific documents within the board book by individual user or group.
- **Archiving:** Does not currently let you archive board books after a meeting. The vendor reports that this functionality will be available as of April 2015.

Organizing Other Documents

- **Organization Structure:** Lets you create folders to store documents that aren't associated with meetings (e.g., bylaws).
- **File Hierarchy:** Lets you create an unlimited number of levels of folders to organize documents.
- **Uploading Other Documents:** Lets you upload and easily view documents associated with a meeting that aren't in the board book (e.g., meeting minutes) as part of the resource center.
- **Saving Documents in Multiple Locations:** Lets you save a particular document to both a particular a folder in the system and a board book by uploading multiple copies.

Collaboration

- **Official Voting:** Lets a board take an official board vote within the portal using the Actions functionality. There is no distinction in the system functionality between official and informal voting or polls.
- **Informal Polling:** Lets the board take a non-official vote or poll using the Actions functionality. There is no distinction in the system functionality between official and informal voting or polls.
- **Board Surveys:** There is no native functionality to let the board take a longer survey, such as a self-assessment. Assessments can be distributed as documents within the portal.
- **Anonymous Voting:** Lets the board take either an anonymous or non-anonymous vote or poll.
- **Call-to-Vote:** A board member can setup a call-to-vote or poll, if granted the appropriate system permissions by an admin user.
- **Shared Annotations:** Does not let a board member share notes with other users.

- **Collaborative Editing:** Does not let multiple users edit the same document collaboratively in real time.
- **Email Notifications:** Sends email alerts to board members when a board book is ready and/or updated.
- **Capturing Email Threads:** Email discussions from outside the system can be captured in the portal by uploading them to the resource center as Microsoft Word documents.
- **Discussion Digest:** Does not provide to board members a daily email digest of portal discussions.
- **Proposal Evaluation:** There is no dedicated functionality to facilitate board members rating or scoring individual grant proposals within the portal, but the vendor reports that the voting functionality could be used for this purpose.
- **Document Versioning:** If multiple people are editing the same document, in-system notifications will alert users to the version conflict. Admin users can select which changes to accept or overwrite.

Mobile Usability

- **Mobile Usability—iOS:** The iPad app for the system is well laid out and easy to use. Navigation and menu items are prominently located, labeled intuitively, and large enough to effectively use on the touchscreen. Upcoming meetings, board books, and other meeting documents are prominently displayed and easy to access on the home screen. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons.
- **Mobile Usability—Android, Windows, Other Mobile OS:** There is no dedicated mobile interface for Android or Windows devices.
- **Desktop Usability:** The web interface for the system is well laid out and easy to use. Navigation and menu items are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be easily found on the user dashboard.
- **Mobile Access—Smartphones:** There is currently no dedicated mobile interface for smartphones. The vendor reports that this functionality will be available as of May 2015.
- **Annotating on Mobile Devices:** The system can sync annotations between the app and the web interface.
- **Offline Access:** Lets you download documents to a computer or mobile device for offline viewing.

Use in Board Meetings

- **Multiple Presenters:** As the system does not include online conferencing functionality, there is no presenter role.
- **Facilitated Reading:** The system does not provide functionality that would allow a meeting facilitator to control all board members' view of the board book on their individual tablets.
- **Chat:** Does not currently provide functionality for board members to participate in an online chat within the portal. The vendor reports that this functionality will be available as of June 2015.
- **Online Conferencing and Presentation Tools:** The system does not include online conferencing functionality to facilitate virtual board meetings.
- **Managing Documents for Policy-Based Governance:** Does not allow you to link to an uploaded document from the resource center in a board book. You must make a new copy of the document.

Security and Access Management

- **Security Settings:** Admin users can specify security settings by user and per folder or document, with the potential to turn off all security features except a single-factor login.
- **Secure File Format:** Board documents are stored in the system as PDF files.

- **Download Permissions:** Does not let you prevent users from downloading or printing a board book or other document, but documents that have been downloaded to a user's device for offline reading can only be accessed with the user's log-in credentials.
- **Password-Protected Folders:** Lets you create and grant access to specific folders by individual user or group of users to allow only members of a specific committee to view the documents in that folder.
- **Board-Only Folder Access:** Lets you setup folders to store documents that the system admin cannot access by creating different levels of admin users.
- **Single Sign-On:** A board member using the tool for multiple boards can use the same login information to access each of them.
- **Two-Factor Authentication:** Admin users can enable two-factor authentication for both web and mobile app access.
- **Robustness of Security Protocols:** The system security meets the needs of large, international, or security-conscious foundations and corporations.
- **Non-Retrieveable Documents:** Documents saved within the mobile app for offline reading can be completely deleted from the user's device when access to the system is revoked. Documents that have been downloaded to a user's computer can only be accessed with the user's log-in credentials.

System Administration

- **Login History:** As the system does not record user access, admin users cannot see a log-in history for users.
- **Summary of Usage:** As the system does not record user access, admin users cannot see a summary of overall user access.
- **System Backup:** The vendor keeps six redundant copies of all client data between two redundant data centers.
- **Exporting System Data:** All user data and files can be exported in their original formats by an admin user.

Support and Training

- **User Support:** The vendor provides 24/7 phone, email, and online user support at no additional cost.
- **User Documentation:** The vendor provides online training videos, live online or in-person training, and written documentation. Admin users cannot edit or customize the written documentation themselves, but can request customizations from the vendor.
- **Manuals and Documentation:** The vendor provides live online or in-person training, and written documentation tailored for admin users.
- **Training:** The vendor provides online training videos at no additional cost and live online or in-person training at additional cost for both board member and admin users.
- **Migration:** The vendor can provide migration assistance for new clients as part of the implementation cost.

Product Background

- **History:** The vendor has been in business since 2003. Passageways OnBoard has been in use since 2010.
- **Clients:** Vendor reports around 400 North American clients for this system. Approximately 110 of those are foundations or nonprofits.
- **Sustainability:** The vendor reports that the revenue earned from this system covers the personnel and operational expenses required to support it.

Usability

- **Ease of Use—Board Members:** The iPad app for the system is well laid out and easy to use. Navigation and menu items are prominently located, labeled intuitively, and large enough to effectively use on the touchscreen. Annotation and navigation buttons within a document are prominently located and intuitively labeled with graphic icons. The web interface for the system is also well laid out and easy to use and navigation and menu items are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be easily found on the user dashboard.
- **Ease of Use—Administrators:** The admin interface is well laid out and easy to use and navigation and menu items are prominently and intuitively labeled. Creating a new meeting or board book is an intuitive process of building out the sections and agenda items through a drag-and-drop interface and uploading the related document to each section or agenda item. Many settings for meetings and board books, such as privacy settings and due date, are controlled through checkboxes on the same screen used for uploading that document.

APPENDICES

APPENDIX A: METHODOLOGY

Review Criteria

To learn about what features and functionality most foundations and organizations need from a board portal, we conducted nearly a dozen interviews. Interview subjects included foundation staff and board members recommended by TAG for having recently selected a board portal system, and as representative of people who chose different systems and options. These interviews took place in December of 2014 and January of 2015 and were used to identify the 89 review criteria used to evaluate the systems.

Software Reviews

How did we choose the six systems to review? Through two methods—first, we conducted desk research, emails, and telephone calls to board members and foundation staff to ask about the tools they used and to compile a general list of the tools available on the marketplace. TAG also provided the results of a survey of its membership in which foundations listed the board portals currently in use. We then compared those systems to the requirements gathered through

our interviews and eliminated systems that did not meet the basic needs of the foundation audience. Our initial list included a seventh system, BoardBook, designed for the school board market, but the vendor declined to participate in the report.

In February, March, and April of 2015, Idealware conducted two-hour demos of the six systems included in this report, reviewing the 89 features and attributes identified through the expert interviews. During the next few weeks, we worked with the system vendors to let them proof our reviews for errors or factual inaccuracies. Vendors did not have final approval over their own reviews, nor were they shown any parts of the report other than their own system reviews prior to publication. Review criteria were grouped into 12 categories and each system was given a rating for each category based on a rating framework (as defined in *Appendix B: How We Evaluated the Systems*).

Note: Vendors do not pay for inclusion in this report, and neither the vendors nor the funder, TAG, had any input into the editorial content.

APPENDIX B: HOW WE EVALUATED THE SYSTEMS

Each rating assumes that the system also meets the criteria for all previous rating levels—for instance, a system cannot be rated Excellent unless it also meets the criteria for Solid and Fair.

Fair	Solid	Excellent
Reading and Annotating Documents		
<ul style="list-style-type: none"> Lets you print out specific sections or pages of the board book. Lets board members add a note that they can see next to a particular piece of text in the document. Electronic documents look exactly the same as a printed version of the board book. 	<ul style="list-style-type: none"> Lets board members either highlight or strikethrough text in a document, but potentially not both. Board members can easily navigate to documents from a past board meeting. Lets you annotate board book documents using functionality embedded in the tool itself. Lets you view documents in a familiar PDF format. Board members can bookmark a page in the board book to easily return to for later reading. 	<ul style="list-style-type: none"> Lets you search the text of a board book for a specific word or phrase using the built-in search functionality. Lets you search the text of all documents in the board portal for a specific word or phrase by using the built-in search functionality. <p>TWO OF THE FOLLOWING ARE TRUE:</p> <ul style="list-style-type: none"> Lets a board member search the full text of the board member's own notes in a document. Lets board members both highlight and strikethrough text in a document. The Table of Contents supports a drill-down model of automatically linking to sub-sections.
Calendars		
<ul style="list-style-type: none"> Board members can see a calendar of all their upcoming grant and committee meetings. Users can download meetings and events and manually import them to Microsoft Outlook or other email and calendar client. 	<ul style="list-style-type: none"> Board members can easily see a list of upcoming tasks and their due dates. 	<ul style="list-style-type: none"> Lets you send out a scheduling survey to find a time to schedule a meeting and automatically confirm availability. Lets users turn on and off what calendars are displayed and customize the look and feel of the calendar.

Fair	Solid	Excellent
Creating Board Books		
<ul style="list-style-type: none"> • Lets you associate all of the documents for a board meeting (i.e., create a board book). • Lets you upload documents for a board book in a specific order and automatically generate unique page numbers for the documents within the board book. • Can have a board book in progress that is only visible to the administrative team before it becomes available to the board. 	<ul style="list-style-type: none"> • It's possible to create an easy to see agenda that is separate from the Table of Contents. • Lets an admin upload a new version of a document into the board book after the board book is published. • Uploading a new version of a document preserves and carries over annotations from the previous version(s). • Lets you copy the structure of the meeting agenda or Table of Contents from a previous board book. 	<ul style="list-style-type: none"> • Provides an automated workflow for creating board books with multiple levels of approval and notes to other admin users. • Lets you easily archive board books after a meeting. • Lets you easily create a Table of Contents for a board book and sections and items automatically link to their respective documents.
Organizing Other Documents		
<ul style="list-style-type: none"> • Lets you create folders to store documents that aren't associated with meetings (such as bylaws). • Lets you upload and easily view documents associated with a meeting that aren't in the board book (such as meeting minutes). 	<ul style="list-style-type: none"> • Lets you create an unlimited number of folders within folders to organize documents. 	<ul style="list-style-type: none"> • Lets you save a particular document to both a particular folder in the system and a board book without creating multiple copies.
Collaboration		
<ul style="list-style-type: none"> • Lets the board take an unofficial vote or straw poll. • Sends board member email alerts when a board book is ready and/or updated. 	<ul style="list-style-type: none"> • Lets a board member share their notes with other users, potentially by individual. • Lets the board take either an anonymous or non-anonymous vote or poll. • Provides version control for documents if multiple people are editing. 	<ul style="list-style-type: none"> • Lets the board take an official vote within the portal and apply an electronic signature. • Lets a board member choose whether to share notes with other individual board members, a group of board members, or all users.
Mobile Usability		
<ul style="list-style-type: none"> • The vendor provides a dedicated mobile interface for the iPad. • Navigation and menu items in the iPad app are prominently located and large enough to use effectively on the touchscreen. • In the iPad app, annotation and navigation buttons within a document are prominently located and intuitively labeled. • Lets you download documents to a computer or mobile device for offline viewing. 	<ul style="list-style-type: none"> • The system can sync annotations between the app and the web interface. 	<ul style="list-style-type: none"> • The vendor provides a dedicated mobile interface for Android and/or Windows tablets. • The Android and/or Windows app is virtually identical to the interface for the iPad. • The vendor provides a dedicated mobile interface for smartphones.

Fair	Solid	Excellent
Use in Board Meetings		
<ul style="list-style-type: none"> An online conferencing tool is included within the portal OR the system can integrate with third-party online conferencing tools using an API, potentially at additional cost. 	<ul style="list-style-type: none"> Multiple presenters can easily share their annotations with the group. 	<ul style="list-style-type: none"> An online conferencing tool is included within the portal. A meeting facilitator can make everyone's view of the board book on individual iPads move to a particular page.
Security and Access Management		
<ul style="list-style-type: none"> Lets you create different folders for different committees and set up security to only allow access to committee members. It is possible to turn off all security features except a single-factor login. 	<ul style="list-style-type: none"> The system security meets the needs of large, international, or security-conscious foundations and corporations. Documents saved within the mobile app for offline reading can be completely deleted from the user's device when access to the system is revoked. Admin users can enable two-factor authentication for both web and mobile app access. 	<ul style="list-style-type: none"> Board documents are stored in a secure, encrypted file format. A board member who's using the tool for multiple boards can use the same login. Lets you prevent users from downloading or printing a board book or other documents.
System Administration		
<ul style="list-style-type: none"> The vendor maintains at least one backup copy of all client data. 	<ul style="list-style-type: none"> All user data and files can be exported in their original formats by an admin user. 	<ul style="list-style-type: none"> Admin users can see when users have last logged into the portal. Admin users can see a summary of overall usage of the system.
Overall Usability		
<ul style="list-style-type: none"> Navigation and menu items in the mobile app(s) are prominently located and large enough to use effectively on the touchscreen. In the mobile app(s), annotation and navigation buttons within a document are prominently located and intuitively labeled. 	<ul style="list-style-type: none"> Navigation and menu items in the desktop interface are prominently and intuitively labeled. Actions that most users will need to take (polls, upcoming events or tasks, emails or notifications) can be easily found on the user dashboard of the desktop interface. 	<ul style="list-style-type: none"> Creating a new meeting is intuitive. Creating a new board book is intuitive. Documents in a board book can be uploaded or arranged on a single screen.

APPENDIX C: OTHER WAYS TO COLLABORATE

As part of the research for this report, TAG commissioned Idealware to write an article looking at different tools available to help boards and organization staff collaborate. We considered different types of software at varying price points to fill a wide range of needs. If you're not sure your foundation needs a board portal system for your collaboration needs, start here.

A Few Good Tools: Board Portals and Other Ways to Collaborate

By Amadie Hart and Kyle Henri Andrei, Idealware | April 2015

Collaboration is integral to the work done by foundations and nonprofits. This is especially true for boards of directors tasked with working together to guide organizations—but when board members and staff are spread across multiple offices or geographic locations, collaboration is not as easy as sitting around a conference room table. Whether voting on proposed budgets, preparing financial documents or recommendations for upcoming meetings, or evaluating pending grant proposals, sharing documents by email or participating in conference calls is sometimes not enough.

Software can bridge the distance and unite dispersed collaborators by making it easy to present, review, and comment on information. Some tools are designed for more general collaboration and can be tailored to meet the more specific needs of a board. Others are purpose-built for the board environment.

Choosing the right one is a matter of requirements and budget. We talked to a number of board members, non-profit staffers who support them, and consultants in the field to find out what to consider when reviewing tools for board collaboration. Here's what we learned.

Board Collaboration Tool Requirements

The needs of every board might vary, but many share a number of tasks and requirements. Whether your organization is creating a makeshift solution using existing software (such as a project management system or shared calendars) or shopping for dedicated board portal software, these are the minimum features you will need.

Creating board books and other meeting documents: Assembling a board book and related meeting materials is among the most important roles of a board collaboration tool. Because you may need to create, upload, and organize hundreds of documents for every board meeting, it's essential that the system make this process as smooth and practical as possible. You can compile multiple documents and assign page numbers and a Table of Contents in a number of tools, including Microsoft Word and Adobe Acrobat, but these require more user involvement and effort. Some dedicated board portals facilitate this task by letting you upload all the documents at once, in order, for automatic assembly—including page numbers and, in some tools, hyperlinked tables of contents.

Depending on who is involved in creating board books—organization staff, the board secretary, committee chairs—you may want to be able to assign specific documents to be created and compiled by specific individuals as well as due dates for completion. Some of the more feature-rich (and expensive) board portals provide

dedicated editorial workflows for meeting documents, including rounds of approval and automatic notifications. Others even provide “security” features by allowing you to restrict access to books by individual users or groups and only letting board members read the final versions.

Board members also need access to—and the ability to edit and upload—other materials, including by-laws, meeting minutes, and policies, for example. A good collaboration system will allow for easy organization in multiple folders, and in some cases, let you restrict access to certain folders by individuals or groups.

Sharing and accessing meeting documents: A lot of work goes into creating board books and other materials—making it easy and intuitive for board members to read those documents is essential. In addition, they need to be able to annotate or mark-up meeting documents, highlight or strike-through text, and write notes or comments. Documents should also be easy to search through and navigate. Creating a PDF is the most straightforward way to do this. PDFs even allow for some annotating and searching.

But dedicated tools offer streamlined, user-friendly apps for tablets and other mobile devices that allow users to easily read and annotate documents. In fact, because so many corporate and foundation boards have begun using tablets, a lot of design work has gone into these apps, making them easier to use than desktop or web interfaces. However, some board members may want the ability to print out hard copies of documents, so it’s important to make sure that documents can use the same formatting and images in both print and online versions.

Sharing and viewing calendars: Board members are busy people. They want to be able to easily see their meeting schedule and RSVP for board and committee meetings. Shared calendar tools such as Google Calendar and Microsoft Outlook do a reasonable job of this. Most board portals include built-in calendar tools.

Collaborating as a board or committees: A board collaboration solution should enable members to work together on documents or committee work online. Online chat tools such as Google Chat, HipChat, or Campfire allow for real-time online conversations. More robust systems, including some project management tools and board portals, allow you to capture the work and conversations between board members alongside the documents on which they are collaborating.

A dedicated board portal will also support collaboration during meetings using online functionality for official voting and more informal straw polls for decisions that don’t need to be recorded as part of the minutes. More full-featured systems may even include online conferencing functionality for fully virtual meetings, although many boards make do with Skype, Google Hangouts, or another videoconferencing tool.

Does your foundation or organization need a dedicated board portal? Or, can you make do with a combination of other systems, many of which you might already use? Let’s take a look at the different options available to you.

Creating Your Own Board Collaboration Solution

For smaller organizations, dedicated board collaboration tools are not likely to be practical or affordable. At the low-end of the scale for both functionality and cost, these nonprofits and smaller foundations can create their own collaboration solution using a combination of file sharing systems, Google Docs, project management tools, shared calendars, and online chat or conferencing tools. This sort of makeshift solution can be a great way to get started quickly, or to meet less-complex needs, but doesn’t provide as many features. It can also be a barrier to use for board members to have to learn and adapt to multiple tools.

Adapting File Sharing Systems

An online cloud storage service allows you to share files with individuals outside your office. Many organizations with multiple locations or distributed staff already use these tools.

Dropbox (<http://www.dropbox.com>) and **Box.com** (<http://www.box.com>) provide file storage and sharing. Both systems are similar in layout and functionality, with simple interfaces and mobile support useful for organizations whose board members have a varying degrees of comfort with technology. Both have apps that allow for easy file access from mobile devices, but Box.com lets users save files for offline viewing while Dropbox requires exporting files to another app to make them available for offline viewing. Dropbox integrates with Microsoft Office apps, making it possible to open and edit files on mobile devices. Both systems provide basic sharing capabilities with their free plans and more granular permissions and security controls, with paid plans that include the ability for administrators to restrict access to certain documents and folders.

Individuals receive 2GB of free storage space with Dropbox and 10GB with Box.com. Dropbox offers expanded storage plans at a cost of \$9.99 per month for 1TB of space or \$15 per user per month for unlimited storage space, with a discount to nonprofits. Box.com offers 10 free starter licenses for its paid services to eligible nonprofits through its **Box.org** philanthropic arm (<http://box.org>).

Google (<http://google.com>) provides a variety of tools that, used together, can meet many of the needs of board members. Documents can be shared using Google Drive, meetings and deadlines can be shared using Google Calendar, discussions can be facilitated through Google Groups, online votes and surveys can be set up through Google Forms, and all these links can be collected and accessed on a web page created in Google Sites. The Google Drive mobile app also allows for offline access of selected files, enabling board members to download documents to their devices for review. Most Google services are free and Google has an excellent program for nonprofits that provides free access to the **Google Apps** suite (<https://www.google.com/nonprofits/products/>).

However, this approach poses challenges. Using so many different tools means staff members have to manually create and compile all board items. And while access to certain files or folders can be restricted, the security is not as robust as what's available through paid collaboration tools. Less tech-savvy users might get frustrated with the need for multiple tools, as well.

Using Project Management and Collaboration Tools

General project management tools incorporate basic project planning, document sharing, task management, shared calendars, and online discussion boards into a single system. These web-based tools are particularly useful for geographically diverse teams or teams that include members from outside the organization. They offer a lot of structure—users upload documents, and people can comment on them or build shared task lists or calendars, for example. While some project management systems are primarily focused on workflow and scheduling, several options can function well as board collaboration tools.

Huddle (<http://www.huddle.com/>) is a tool that bridges the gap between file sharing services and more full-featured project management solutions. Admins can upload files to secure workspaces where board members can review and comment on them. The software includes a robust task management tool, workspace calendars, whiteboards for shared notes, granular sharing and privacy controls, and mobile apps for iPad, iPhone and Android devices. **TechSoup** offers donated Huddle packages (subject to a \$125 administrative fee) to selected nonprofits based on a set of eligibility criteria outlined on its website (<http://www.techsoup.org/products/huddle-25-user-package--G-48444--Tasks>). This package provides access to the Workgroup edition of the software for up to 25 users. Standard pricing is \$20 per user per month.

Basecamp (<https://basecamp.com/>) is one of the most widely-used online project management tools and provides an intuitive interface and thoughtful email integration that allows individuals with varying levels of technological comfort to use the system. Admins can upload documents for board members to review and add comments, create calendars with meetings and due dates, assign tasks, and notify users when new content is added to the system. Board members can choose to receive emails when updates are made to the project and can share their comments by

email rather than logging in—Basecamp will automatically add those comments to the project. There are apps for a wide range of mobile devices, as well as many third-party integrations to extend the tool's functionality. Pricing is based on the number of active projects, and supports unlimited users. The tool is free for one active project, and the paid version starts at \$25 per month for 10 active projects and 3GB of storage, which translates to \$300 per year.

Sharepoint (<https://products.office.com/en-us/SharePoint/collaboration>) inspires strong feelings among users—both positive and negative—but continues to be a popular tool for document storage and sharing. It can be put to use for board collaboration purposes as well. Numerous nonprofits already use the tool for internal collaboration, but the web-based Sharepoint Online offering opens up Sharepoint's many features to organizations that do not have the resources to implement and maintain a Sharepoint server. The tool is definitely worth considering for board collaboration purposes if it is already implemented within an organization. Admins can post documents for board members to view, edit, and download, and can share calendars as well. Access control is very granular, and admins are able to set permissions for each user. Less technologically-savvy board members may be daunted by the tool's less-than-intuitive interface and learning curve. Sharepoint Online, the web-based version of Microsoft's popular online collaboration software, costs approximately \$600 per year for 10 users, however, organizations may already have Sharepoint server up and running for internal collaboration purposes.

While **Central Desktop** (<http://www.centraldesktop.com>) is on the expensive end of online project management and collaboration solutions, users get a great deal of bang for their buck. Admins can post files for review and comment, board members can receive notifications and send comments via email that are captured in the system, shared calendars are available for project workspaces, and a robust search function can quickly help board members find just what they're looking for within the documents in the workspace, or even across workspaces. Central Desktop offers mobile apps for Android and iPhone/iPad devices, as well as a mobile-optimized site. Granular security and access control is available to admins, as well as the ability to make content or folders viewable only to internal team members. However, with an annual cost that exceeds that of some entry-level board portal software solutions, this may not be the best option for organizations not already taking advantage of the system's workflow and project management features. In order to allow external users to access Central Desktop workspaces, organizations need to use the Central Desktop Premier package, which is \$25 per user per month, or approximately \$3,000 for 10 users over the course of a year.

This is by no means an exhaustive list. Many other project management tools can also be used to share calendars and documents with board members, capture discussions and allow for collaboration. New solutions such as **Trello** (<https://trello.com>) provide incredibly simple user interfaces, with drag and drop functionality. Other project management solutions, such as **Teamwork Project** (<https://www.teamwork.com>) and **LiquidPlanner** (<http://www.liquidplanner.com>), integrate with external sites such as Dropbox, Box.com, Google Drive, and Salesforce.

Using Dedicated Board Portals

Board portals are tools designed specifically to help staff manage and create documents, and to help board members share, read, and annotate board books and other meeting documents through a user-friendly interface. As most of these tools originated in the for-profit sector and are designed for banks and corporate boards subject to stringent regulations, they are first and foremost secure.

In the past few years, prices have come down, drawing interest from the nonprofit sector. Vendors have responded by adapting to better meet the needs of nonprofit boards. However, the tools remain expensive for foundations on a tight budget or all but the largest nonprofit organizations.

Almost all provide streamlined, easy-to-use interfaces for tablets (primarily iPads) and robust permission and security settings. Many provide chat and notification functionality to allow board members to discuss duties and collaborate on meeting documents within the system. Few, however, provide built-in online conferencing or other presentation tools. Board members who cannot attend meetings in person will have to seek third-party conferencing tools.

Better-featured systems let you create multiple user workgroups or permissions to restrict access to specific documents by individual or group. Some will determine pricing by number of committees. Other pricing considerations include online storage space for documents, the number of total users, the number of administrators, and one-time implementation fees.

BoardPaq (<https://www.boardpaq.com>) is an easy-to-use tool providing strong support for basic needs such as document management and creating and sharing meeting documents. The system allows admin users to publish board books piecemeal, notifying board members in the system as more documents are added. Pricing starts at \$1,188 a year for up to 15 users for 501(c)(3) nonprofits. Two-factor authentication is available for more robust security at an additional cost of \$30 per month.

Passageways OnBoard (http://www.passageways.com/board_portal.php) provides a streamlined, easy-to-use platform with solid functionality for creating and reading board books and other meeting documents on both the iPad app and web interface. Creating a board book is straightforward and intuitive. The functionality for official votes in a meeting is prominently located and easy enough to set up on-the-fly, but you'll need a third-party tool to create and conduct a survey or self-assessment of board members. The system costs \$1,250 per year for up to 11 users, including support, training, and unlimited data. There is also an initial implementation fee of \$500 after the nonprofit discount.

BoardEffect (<http://boardeffect.com>) provides solid support for creating and managing board books and other meeting documents with an easy-to-use and intuitive iPad interface that allows board members to read and annotate documents. Admin users can create multiple layout templates for board books, which is particularly useful for organizations with more than one board or that need substantially different materials for different committees. However, it may be tedious to create board books with a large number of documents—for example, grant summaries or proposals needing board review—as you can only upload up to 10 documents at a time through the drag-and-drop interface and uploading documents to specific sections may need several steps or screens. Pricing starts at \$6,000 a year for up to 20 users, including support, training, and unlimited data.

Diligent Boardbooks (<http://www.boardbooks.com>) provides solid functionality for organizations that need granular permission settings or editorial controls over their meeting documents. The system provides robust workflow for board books, including automated notifications for internal review and a multi-step approval process that allows directors to add notes on what needs to change for approval. Apps are available for both iPad and Windows 8.1, but the online interface—designed to resemble a physical notebook—is straightforward but dated. The voting functionality for official board votes is well thought-out, allowing board members to add electronic signatures to approve specific documents. However, an admin user must add a signature block for each voting board member, making this feature less-well-suited for spontaneous votes or informal straw polls. Pricing starts at around \$1,000 per year.

Boardvantage (<http://www.boardvantage.com/>) provides solid support for creating and managing board books and other meeting documents. The easy-to-use interface allows mobile users to read and annotate documents, access annotations across a variety of devices, and share annotations with other system users. Creating a board book is a straightforward process, and while the tool makes it simple to upload a variety of documents to include in a board book, linking the documents to an agenda or Table of Contents is a more manual process. The tool makes it easy to replace documents with updated versions, and Word, Excel and PowerPoint documents can be edited within the system. Boardvantage's "Present" mode in the Meetings module allows for online conferencing so that presenters can guide meeting participants' views of meeting materials. It also enables online discussions within meetings. For pricing information, contact the vendor.

The tools listed here are only the tip of the iceberg of the board portals market. Organizations looking for lower-cost options might also consider other tools in this space, such as **MyCommittee** (<https://www.mycommittee.com>), which starts at \$228 per year for unlimited users, two committees, and 200 MB of storage, or **BoardMax** (<http://www.streamlinksoftware.com/products/board-management/boardmax/>) from StreamLink Software.

Foundations with larger, more geographically-dispersed boards or that need more comprehensive feature-sets should consider **Director's Desk** (<http://www.directorsdesk.com>) or **Accelus BoardLink** (<http://accelus.thomsonreuters.com/products/accelus-boardlink>). Contact vendors for pricing.

Conclusion

Ultimately, the board collaboration solution you choose will be determined largely by budget and by how well it meets your needs. Dedicated board portal systems will be out of reach for most small nonprofits, but large organizations and foundations may still find themselves needing to make use of more than one tool to accomplish their board meeting goals, as very few board portals can be considered all-in-one solutions.

That's not to say that an all-in-one tool for board collaboration is necessary, or even desirable. Every organization's needs are different. Picking and choosing the individual software that best meets your needs presents the opportunity to customize a solution to your particular demands and budget.

The true challenge of any board collaboration solution is adoption. The system you implement can only be useful if your board members like to use it. Adoption should be considered when selecting and reviewing tools. When implementing a solution, allow time for board members to get familiar with the system and to develop the habit of using it.

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APPENDIX D: ABOUT THIS REPORT

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Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. Prior to Idealware, he was managing editor of a newspaper and a senior copywriter at an ad agency. For the past seven years, he's overseen Idealware's editorial and communications efforts, driving the creation and publication of more than a hundred articles, reports, and other resources and managing the communications calendar. Outside of his work at Idealware, he's an award-winning author and a frequent speaker and lecturer at literary conferences and festivals around the country.

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About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits make smart software decisions. Nonprofits maintain a complicated relationship with technology. Most know that software can streamline their processes and help fulfill their missions more efficiently and effectively, yet lean staffing and tight budgets mean they're unable to devote the time necessary to keep up with new technologies and find the right tools. From the most basic questions (such as how to use software to help manage emailing hundreds of people at once) to the more complex (such as understanding the role of social networking and mobile phone text messaging in fundraising strategy), organizations need a trusted source for answers.

Idealware provides an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps nonprofits make the most of their time and financial resources. And our reach is expanding; our reports have been downloaded hundreds of thousands of times.

Idealware is made up of a small, growing staff aided by a community of experts, including content partners and contributors, and overseen by a remarkable board and set of advisors. Learn more about Idealware, read hundreds of free articles and other resources, download free reports on topics of interest to nonprofits, or sign up for our mailing list to be kept in the loop about new free resources at www.idealware.com.

About the Technology Affinity Group

TAG is a membership organization of foundations that promotes the understanding of how information and communications technology can help its members further their philanthropic goals. TAG is an active community of professionals responsible for information and communications technology in the philanthropic sector. The community provides the highest-quality resources and learning opportunities in an open and trusted environment. The findings and conclusions contained within are those of the authors and do not necessarily reflect official positions or policies of TAG.

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