



BoardEffect
a Diligent brand

Board management software:

A buyer's guide for public-sector and mission-driven organisations

“Well-governed organisations have proven to be more effective, and more likely to succeed, than poorly governed ones.”

– [Deloitte](#)

Public-sector and mission-driven organisations today operate in a complex and challenging world. As economic uncertainty and rising living costs drive demand for their services, funding shortfalls hinder resources and capacity for the delivery of these services. To make life even more difficult, many organisations face rising competition for donors yet find themselves struggling to keep pace in the current digital fundraising landscape.

Meanwhile, increased use of technology exposes the organisation to the risk of data breaches and cyberattacks, with any incident jeopardising trust among donors and beneficiaries alike.

Throughout, all stakeholders seek transparency on resource use and operations. Are you acting with integrity? Are you building for the future? Are you making an impact?

Address these questions with the wrong answers – or no answers at all – and you'll find your organisation's resources and support dwindling even more, further stifling growth and impact.

Turning such a downward spiral into a virtuous circle of effectiveness starts at the top, with strong leadership and governance. But maximising the time, talent and energy of a volunteer board is easier said than done.

Board management software can help. Read on to learn why and how to make the right choice.

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The unique plight of volunteer boards

Whether in education, healthcare, government or the charity sector, the boards of public-sector and mission-driven organisations face a common leadership challenge: Your volunteer board members aren't getting paid for all of this.

Spending time and energy on your organisation's mission is a labour of love – and competes for attention among many other obligations and priorities.

The commitment of a volunteer board member is something you can't take for granted. Their engagement is critical to sharp strategic guidance, strong donor relationships and your organisation meeting its objectives. Disengagement, turnover and poor succession planning put their effectiveness – and your mission – at risk.

Every administrative obstacle that wastes time, causes frustration or impedes effectiveness is a liability your organisation can ill afford.

Let's take a look at some specific pain points.

Too many sources and systems

Where's the latest list of donors? Meeting minutes? Results from a beneficiary survey? If trustees and council members are toggling across multiple logins and systems to find what they need, you have a problem.

The more time it takes board members to prepare for a meeting, and the more hassles they face, the less motivated they'll be to stay engaged with your organisation and give the best of their time and talents.

Too much information

When donor databases, program progress reports, beneficiary surveys and the annual budget are all housed in different systems, or worse – separate email attachments, it's tough for volunteer board members to see the big picture. Do your tools and processes help them focus on what's important?

Accuracy and context matter as well. Especially when making important decisions, board members need to be looking at the most current version of documents and editing the latest iterations.

Security risks and threats

If board members are using personal emails to share sensitive documents and chat groups to discuss confidential business, they're opening your organisation up to data leaks and security risks – especially as cybercriminals targeting not-for-profit organisations more and more, and increasingly use sophisticated technologies like AI in their attacks.

According to the [2023 Cyber Security Breaches Survey](#) by the UK government, **56% of charities with £500,000 or more in annual income recalled a breach or attack in the past 12 months.**

Keeping everyone on the same page

Insecure ad hoc means of communication impede productivity as well. Disconnected email chains and messaging groups leave vital contributors out of important discussions. Inefficient follow-up stalls decision-making.

As frustrations mount and effectiveness wanes, you risk volunteer board members losing interest in your organisation and mission.

Board management software rises to the challenge

At the turn of the century, board portals emerged for both for-profit and mission-driven organisations, enabling directors and key staff members to access digital documents through their mobile devices and securely communicate with one another.

This technology has evolved significantly since then, evolving from online repositories of board documents and data to powerfully multifaceted governance solutions.



Some of the more complete offerings in the marketplace offer:

- Agenda and meeting management tools
- Digital board books
- Secure file storage and sharing
- Customised approval workflows with certified digital signatures
- Real-time collaboration capabilities in dedicated workrooms for board and committee work
- Intuitive video conferencing and document management integrations
- Digital annotation and note-taking tools for meeting preparation
- Surveys, polls and questionnaires
- Support for multiple languages
- Secure communications for board members
- Centralised libraries for resources and supporting documents and information

Ideally, a board management solution offers all of these features and functionality from a single intuitive interface, for the one-stop efficiency and ease of use desired by leaders and administrative staff alike.

Benefits for public-sector and charity boards

With board management software, everyone in your organisation – from the executive director and volunteer board to the teams who support them – stands to benefit.

For governance professionals and admin staff, streamlined digital workflows and one-stop information access accelerate document preparation, meeting planning and other previously time-consuming manual tasks, freeing up time for other priorities.

This efficiency extends to your volunteer directors, who now have information at their fingertips for more efficient meeting prep, as well as a consolidated view of what's important for strategy, planning, risk awareness and mitigation.

Board management software makes IT teams happy as well. Directors and other stakeholders are no longer storing confidential documents on personal devices or using their own email addresses for sensitive discussions. Board management software corrals all of this vulnerable data into one secure ecosystem.

“Having everything in one place is extremely beneficial. I have a lot of requests for items from previous years. Now I click some boxes and here you go, it looks like I’m a magical worker! BoardEffect has **saved me hours of searching** for different information.”

– Susan Bovair, Executive Assistant to the CEO and Board Liaison, Starfish Family Services



Building your case

Despite all of these powerful features and advantages, change is hard. It's human nature to cling to old, familiar ways of doing things and resist innovation, especially when one's plate is full and one's bandwidth is finite for learning something new.

You know that board management software is worth the investment, and that you'll soon wonder how you would live without it. So, how do you convince your colleagues and leaders that it's time to make the leap?

Ask the executive director or CEO:

- How much time are you and your staff spending on strategy, growth and risk management, and how much time is wasted on administrative tasks?
- Are you satisfied with the pace and effectiveness of decision-making?
- How comfortable are you with the security of board communications and data?
- Do you worry about data breaches putting our organisation's reputation – and your own reputation – at risk?
- How engaged are our volunteer directors? Could this be better?

Ask volunteer directors:

- Do you feel like you have the information you need, when you need it, to contribute effectively to board meetings and decisions?
- Are you frustrated with the time and steps involved in preparing for a board meeting?
- Do you feel that board meetings are as effective as they could be?
- How confident are you that sensitive board data and discussions are being protected and board operations secured from cybercriminals and hackers?

Ask administrative staff:

- Are operations like board meeting prep causing you to work overtime or keeping you from other responsibilities?
- Do issues like version control, board member notifications and getting materials compiled on time keep you up at night?
- Do board members seem pleased with the process of meeting prep and administration – or are you hearing complaints and sensing disengagement?
- Do you have difficulty engaging board members and keeping their efforts on track toward your mission?

Ask the IT director/CIO:

- How confident are you that board members are communicating securely?
- How confident are you that board members are storing and sharing documents securely?
- How well do your board's current tools and systems meet the latest cybersecurity regulations and best practices?
- Do board members have a foundation for you to effectively communicate technical information regarding cyber risk, AI and other emerging technologies?
- Will these tools keep your board ahead of cyberthreats one year from now? Five years from now?

Regulatory compliance is a critical area of board oversight. For EU boards, this ranges from [GDPR requirements](#) for client, donor, employee and volunteer data to the transparency requirements of the European Parliament's new [Artificial Intelligence Act](#).

Important things to consider

You've made your case. You're ready to start shopping. What should your organisation look for in a potential solution?

Price matters. But an even more important thing to consider is value: how well a solution meets your volunteer board's specific operations and challenges.

With this in mind, here are a few things to look for when evaluating options in the marketplace.

Efficiency

- What manual processes, like scheduling meetings and compiling reports, are replaced or made easier?
- How does the solution support two-way communication and collaboration?
- Does the solution put all relevant information in one place – and make it easy to search?
- Will it save you and your colleagues time?

Security

- What features does it offer for controlling access to sensitive data and managing permissions?
- How does the solution protect data in transit and at rest?
- How does the solution support secure messaging?
- Does the solution reflect the latest cybersecurity tools, certifications and best practices?
- Does the vendor dedicate time and resources to staying ahead of cyber trends and threats?
- Are security patches and support with incident recovery and remediation part of the vendor partnership?

Scalability

- What's involved in terms of time and cost for adding new users, committees and workgroups?
- Will you be able to customise and adapt features as your board's needs evolve?
- Are new features and functionality part of the vendor commitment?
- Does the vendor regularly invest in R&D to keep the solution up to date with technology and governance trends?

Ease of use

- Is the solution mobile, so board members can use it anytime and anywhere?
- Are functions like new member onboarding and meeting prep intuitive, with a focus on self-service and a gentle learning curve?
- Does the solution integrate with the software board members already use on a daily basis, like Outlook and Zoom?
- What kind of training, such as webinars, tutorials and how-to guides, does the vendor provide?
- What kind of customer support does the vendor offer when you or board members have questions?

When a nine-member nonprofit board of [trustees](#) adopted a board management software system, one trustee continued to read paper copies of the board report and supporting documentation. The board management solution shows system administrators this trustee's lack of engagement, so board leaders can address it before overall efficiency, collaboration and security are at risk.

Making the right choice

[BoardEffect](#) is built with these questions, and the success of volunteer boards, in mind. Here's how.

Get more done, faster, with:

- Digital meeting books that let you easily add documents, drag and drop agenda items, automatically convert files to PDF and more
- Customised meeting templates and workflows
- Easily searchable libraries with files organised in a familiar folder structure

Work more securely with:

- Watermarks, certified e-signatures and automated audit trails
- Access control for documents and workrooms
- Multifactor authentication

Powerful features add up to ease of use

An engaging experience begins with the first log-in.

For meeting prep, board members get a single, mobile-friendly place to review materials, make notes with private or shared annotations and view a personal newsfeed and outstanding tasks, including RSVPs. BoardEffect then syncs with Outlook, iCalendar and Google and Zoom to make meeting attendance hassle-free.

Meanwhile, governance professionals and administrators have a powerful array of tools, from surveys to polls and beyond, for gauging board member engagement, gathering updated skillsets and identifying areas for improvement.

“By partnering with BoardEffect, your life will be 100% easier. It provides a one-stop shop for governance and helps empower our volunteers and board members to ensure they're doing everything they can to maintain that vision and mission.”

— Ericka Rodriguez, Executive Assistant to the CEO, YMCA



BoardEffect is a registered G-Cloud service provider



The G-Cloud Digital Marketplace helps UK public sector organizations to find the right technology.



Buying services through G-Cloud is faster and cheaper than entering into individual procurement contracts.



BoardEffect is proud to be a registered G-Cloud service provider, which allows public sector organizations to get up and running with us much faster.



HM Government
G-Cloud
Supplier



Hear from our happy customers

BoardEffect is a top-rated provider of board management software and is consistently recognized by G2 as a leader in our industry.

Our accolades and positive ratings are a testament to our deep commitment to delivering unparalleled solutions to our customers. Their feedback, in turn, helps drive our innovations and successes. G2's software awards are based on authentic, verified reviews from real users.

G2's research team analyzes these reviews on a quarterly basis to determine top products and companies across a variety of categories. G2 uses a proprietary algorithm to rank software programs based on customer satisfaction, quality of reviews and market presence.

[Check out some of our recent customer testimonials and awards.](#)

Ready to make your board more engaged, efficient and effective?

With the right board management software, your volunteer board can streamline operations, enhance governance practices, and enable confident decision-making.

BoardEffect, a Diligent brand that has served over 14,000 mission-driven organisations to date, empowers boards with the tools to drive positive change, so mission-driven organisations can unlock potential, accelerate mission delivery and make a lasting impact in their communities.

Take the next step toward stronger leadership, governance and impact. [Schedule a BoardEffect demo today.](#)

About BoardEffect

BoardEffect provides innovative boardroom technology to nonprofit organisations. As a Diligent brand helping to serve over 14,000 mission-driven organisations, we empower boards with the tools to drive positive change. Our secure board management software helps to streamline operations, enhance governance practices and enable confident decision-making. With BoardEffect, mission-driven organisations can unlock potential, accelerate mission delivery and make a lasting impact in their communities.

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