BoardBook®

Best Practices – Templates

Meeting templates provide you with both convenience and efficiency when creating a meeting. Report templates let you format and customize your downloaded agenda and minutes reports.

In this document we will discuss general best practices. Some of these practices may or may not apply to your specific organization.

Overview of Meeting and Report Templates:

Meeting templates automatically populate meeting settings and agenda items. Using them makes setting up meetings easier and faster. For example, a meeting might specify the following:

Meeting Type and Title
Meeting Time
Meeting Location
Agenda Report Template
The basic agenda items

Report templates format the downloaded Agenda, Minutes, or Public Notices. If you want a logo, board member names, mission statements or any other text to appear consistently on your downloaded reports these templates can make that happen.

Best Practices

Do not create a 'preferred' template.

When managing your templates, both meeting and report template allow you to specify a 'preferred' template that can be automatically applied. Because changing the 'preferred' template can occasionally cause issues we no longer recommend this practice.

What to do instead:

Meeting Templates: With no preferred template selected you'll simply pick the desired meeting template from a drop-down list at the top of the meeting creation screen. Creating Meeting Templates is as easy as creating meetings. See 'Working with Meeting Templates' handout on our support page.

Report Templates: Tie your report templates to the relevant meeting template.

Why is this a best practice? Many of our organizations have information on their report templates that changes over time. For example, a mission statement or list of board members. By updating the report template, then pointing to that template from the appropriate meeting template I can ensure that past, present, and future meetings are all tied to the correct template information.

Less is more

Report templates should be setup as general as possible, leaving the specifics to be populated using placeholders. For example, unless there was something different other than the meeting settings (name, time, date, location), and agenda items, you wouldn't need to have a different report template for a 'Regular Meeting' vs a 'Special Meeting' as the placeholder {{Title}} in the template will simply insert the meeting title.

Naming Templates

While the system will allow you to have quite long names for your templates, a best practice is to keep the names both concise and meaningful. Here are a couple of examples:

Use the year instead of 'updated', or 'new'
Indicate difference between template content for example 'w/consent' vs 'no consent'.

Both meeting and report templates allow you to add a description. This can be helpful in providing more information about the template however note that the description is not visible when selecting a template to use, only when managing the templates.

For more information about templates have a look at our 'Working with Report Templates', and 'Working with Meeting Templates' documents on our support page. The support page can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Administration and Meeting Management Help'.