

Self-Paced Training

The most complex and arguably the most important job in BoardBook is creating the meeting and agenda. This job is performed by a user with the Agenda Manager permission. Because of this complexity and importance more resources are dedicated to training and supporting agenda managers than even board members. Training for agenda managers, commonly called Basic Skills training is available in two forms. A roughly three-hour live webinar is generally held every other Thursday and can be registered for on the training tab of BoardBook.org. The other option is self-paced training. Self-paced training involves reviewing online documents and videos created for this purpose. This document can be thought of as a guide to these online materials.

This guide will identify which sections, and then which videos to watch to learn the basics of what we call the meeting cycle:

Foundation Information

These videos provide a starting point for the lessons that follow

The Meeting Cycle: This covers an overall order of events that are followed by most organizations.

Overview of Agenda Item Field and Document Permissions: This discusses how permissions related to viewing documents or other materials work. This can be thought of as controlling who can see what.

Overview of the use of Meeting Status: This covers how the status of a meeting relates to its release to your various audiences.

Tour of the Home Screen: This sets the foundation for understanding how the program is laid out and how to navigate.

Practice Meeting Guide is helpful once you've gone through the other materials. It's designed to guide you through practicing the meeting and agenda skills.

Creating the Meeting

BoardBook is consistent about how it refers to meeting vs agenda. Meeting information for example is the time, date, title, location and similar information but does not include any of the agenda items. This section walks through both the basic and advanced options for creating a meeting. For many organizations the advanced options may not, or only rarely be needed.

Working with the Agenda

This section is all about creating and working with the individual agenda items. How are they created, how can they be moved or copied between meetings, or rearranged. How can attachments be added and configured. If you will not have other users creating and submitting agenda items for your meetings the 'Agenda Item Requester Process' document can be skipped. For the Basic Skills self-paced the following videos are recommended:

Import Agenda Items

Deleting, Deactivating and tabling items in the agenda.

Reordering Agenda Items

Editing an existing agenda item

Adding, deleting and updating attachments

Adding Items or Sub-items to the agenda

Adding sub items or changing an Item's position

Meeting Documents

Whether for a local posting, a less tech savvy board member, or a local archive saving a copy of the agenda and or agenda and attachments is something we all do or should do in the case of a local archive. These resources primarily how to get or configure these documents but also cover how you can add materials of links to your meeting without associating them to a specific agenda item. The following video is recommended:

How to Download the Meeting Materials

Releasing the Meeting

This covers how we can release, cancel, or postpone a meeting. During the live class we release the meeting and send the meeting notification. Cancelling and postponing are mentioned but not covered in depth. For the Basic Skills self-paced the following videos are recommended:

Releasing the Meeting by Changing the Status

Sending a Meeting Notification

Watching the Postponing a Meeting video can be handy but is not required.

Meeting Management and the Minutes.

This section covers our meeting management tools 'Lead / Follow', the public projector and how to use the minutes manager tools to collect the information needed for the minutes. For the Basic Skills self-paced the following videos are recommended:

Minutes Manager Tools

The Public Projector Screen

After the Meeting

This is where we close out the meeting cycle by uploading the approved minutes and making them available to our audiences. The following video is recommended:

Uploading the approved minutes and competing the meeting.

What's next

After going through the material discussed above, we recommend setting up a practice meeting. A guide to creating a practice meeting is found in the foundations section.