BoardBook®

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 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.

In general, a student can simply start with the Foundation Information section of our support page and go through all the videos and documents down through the After the Meeting section. This guide will provide context and prioritization.

Foundation Information

These materials provide a starting point for the lessons that follow

Overview of Agenda Item Field and Document Permissions discusses how those 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.

The Meeting Cycle provides an overview of what we consider a typical meeting cycle. You will note that starting with the next section 'Creating the Meeting' training essentially follows the meeting cycle.

Tour of the Home Screen provides you with a starting point to understand 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.

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.

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.

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.

After the Meeting

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

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.