BoardBook®

Goals in BoardBook Premier

Goals in BoardBook Premier are an Advanced Feature. BoardBook allows you to create goals and categorize them in 'Goal Types' for example 'Board Goals' or 'Committee Goals'. Once Goals have been added they can be referenced in Agenda Items and tagged for reporting, and or, progress towards those goals can be displayed.

Fundamentals

Goal Types: Goal types can be thought of as a way of organizing goals. For example, an organization may have a goal type for 'Board Goals' and one or more others for different committees.

Tag and Report: Tagging allows the organization to tag a given agenda item as being related to or applying to one or more goals. Reporting then provides a way of listing the agenda items which have been 'tagged' to a specific goal. Used by itself, Tagging and Reporting provides a data driven way to identify how often a given goal is referenced across meetings within a time frame.

Displaying Progress: Displaying allows the organization to display on an agenda item how complete, identified as a percentage, a given goal is.
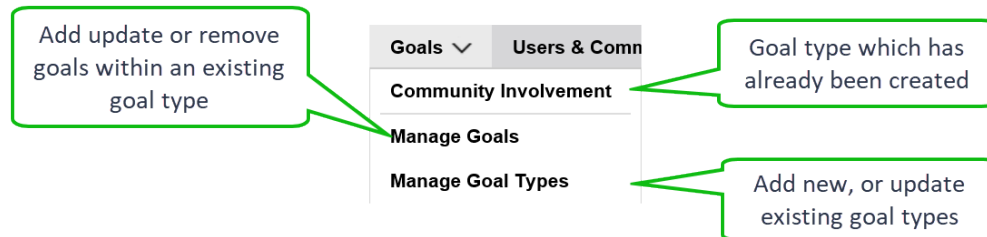
In this document we will cover the following subjects:

Creating and Managing Goal Types

NOTE: To manage Goal Types, or to create or manage Goals a user must have the 'Goal Manager' permission.
NOTE: At least one goal type must be created before goals can be added. Goals must be associated to a goal type.

In the Grey Menu bar click on 'Goals' then choose 'Manage Goal Types.

From the 'Manage Goal Types' screen you can, Add a new type, Manage an existing type, Deactivate an existing type, or, Activate a previously deactivated type.

Add a New Goal Type:
>   Click on the blue 'Add New Goal Type' button.
>>   Add a Goal Type Title and Goal Type Description

Manage an existing Goal Type;
>   Click on the name of the goal type, make desired changes and save.

Deactivate an existing Goal Type
>   In the 'Active Goal Types' section click the orange 'Deactivate' button for the goal type.

Activate a previously deactivated Goal Type
>   In the 'Inactive Goal Types' section click the green 'Re-Activate' button for the goal type.

Creating and Managing Individual Goals Within a Goal Type

NOTE: To manage Goal Types, or to create or manage Goals a user must have the 'Goal Manager' permission.
NOTE: At least one goal type must be created before goals can be added. Goals must be associated to a goal type.

In the Grey Menu bar click on 'Goals'. To create or manage individual goals you can either click the name of the 'Goal Type' you want to manage goals within, or click 'Manage Goals'.

Just below the blue 'Manage Goal's bar you can use the 'View Goals of Goal Type' drop down to switch between 'Goal Types'.

Within a Goal Type, you can, add a new goal, you can also edit, update, deactivate, re-activate, or delete an existing Goal.

Add a New Goal:
      Click on the blue 'Add New Goal' button.
            Add a Goal Title:

You will also need to add a Goal Description

If appropriate you can add an optional Start and or End Date for the goal

You may also add a 'Percent Complete'

Edit, update, deactivate, re-activate, or delete an existing Goal:

In the appropriate Active Goals / Inactive Goals section click on the goal you wish to change.

You may update the Goal Title:

You may add or update the optional Goal Description

If appropriate you can update or add an optional Start and or End Date for the goal

You may also add update the 'Percent Complete'

Finally, you may Delete, Deactivate or Re-Activate the goal.

Working with Goals Within an Agenda

NOTE: To tag or display goal information on an agenda item the 'Goals' agenda item field must be enabled first. See the 'Enabling the Goals Agenda Item Field' section in this document.
NOTE: To add or update an agenda item a user must have the 'Agenda Manager' permission.

Navigate to the 'Edit Agenda' screen, either via creating a new meeting or the 'Edit Agenda' option for an existing meeting.
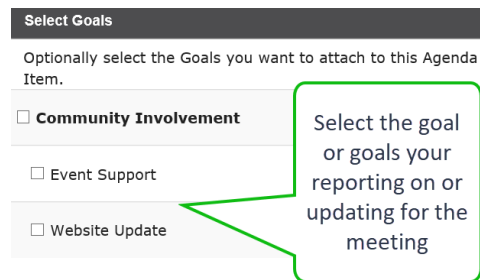
Either add a new, or edit an existing Agenda Item.

Scroll down to find green 'Select Goals for this Agenda Item' button. It will look like this:

Goals

No Goals are Attached to this Agenda Item

☑ Select Goals for this Agenda Item
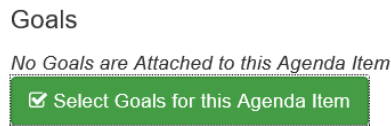
NOTE: If you do not see this option, the 'Goals' agenda item field must ben enabled. See the 'Enabling the Goals Agenda Item Field' section in this document.

Click on the green 'Select Goals for this Agenda Item'

Select Goals

Optionally select the Goals you want to attach to this Agenda Item.

☐ **Community Involvement**

☐ Event Support

☐ Website Update

Select the goal or goals your reporting on or updating for the meeting

Check the box next to the Goal or Goals you wish to tag or display.

The selected Goal or Goals will show up with their current 'Percentage Complete'

Goals

Event Support

Percent Complete for Meeting:

0.1
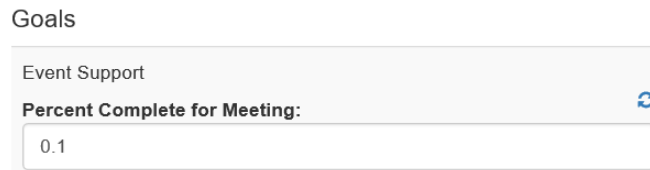
If desired, the Percentage Complete can be updated.

NOTE: <u>This is simply for display purposes on this agenda item</u>. The actual percentage complete will need to be updated by managing the goal itself as previously descibed.

Enabling the Goals Agenda Item Field

NOTE: To enable the 'Goals' agenda item field you must have the 'Settings Manager' permission.

NOTE: Changing system settings incorrectly can cause issues which may be very difficult to recover from. Many of the settings in this section are NOT intuitive. Please only change or update settings as specifically described in these instructions.

In the Gray Menu Bar select Settings, and then 'Meeting & Agenda Options'.
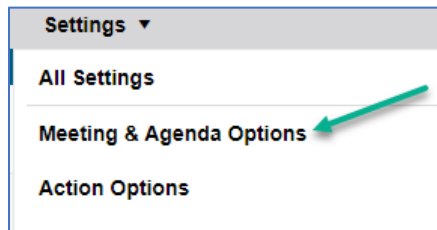
Scroll down and you will find the header below:

Continue scrolling until you find the 'Goals' section as shown below:

Enable Goals as an Agenda Item section by placing a check mark in front of 'Enable this Section?'

Use the drop down so set the default permission for this agenda item field.

NOTE: If your intent is to only use goals for tagging and reporting, and not to display information on a given agenda item, select 'Agenda Managers'. This will prevent goals from displaying for other users, or on the public page.

If you selected a permission other than 'Agenda Managers' you may wish to check 'Default to Shown when the Quick View pages load'

If you selected the permission 'Public / Anyone / Everyone' you may want to check one or more public screens upon which the Goals information will be displayed. For most organizations this will at a minimum be the 'Public Agenda'.