

Top 10 Things to Consider When Using Board Management Software

Smarter Governance. Stronger Decisions. Better Outcomes.



1 The Goal Is Better Governance—Not Better Software



- Focus on Better decisions, transparency, alignment, accountability, and less burden.
- The platform should support governance, not become the process.
- Technology is an enabler—strong governance is the goal.

2 Understand the Vendor's "Why"



- Evaluate the vendor's mission, values, and commitment.
- Look for a true focus on public education and governance.
- Choose a long-term partner, not just a software provider.

3 Connect to the Governance Expertise You Already Trust



- Leverage state association resources inside your workflow.
- Policy updates, reviews, and support should flow directly into your process.
- Use trusted templates and expertise for evaluations and more.

4 Governance Work Should Connect



- Link meetings, policies, plans, decisions, and documents.
- Connect actions to the goals, plans, and measures they support.
- See how today's decisions advance strategic priorities.

5 Workflow Should Reduce Administrative Friction



- Route items, approvals, and reviews with automated workflows.
- Reduce email chains, duplicate work, missed steps, and confusion.
- Stronger process discipline improves consistency and auditability.

6 Search Is a Governance Tool



- Find prior discussions, votes, policies, and minutes quickly.
- Preserve institutional memory through strong search.
- Access to history drives more informed, consistent decisions.

7 Access Should Work Wherever Board Members Work



- Intuitive experience with a low learning curve.
- Reliable on any device—laptop, tablet, or phone.
- Secure, accessible, and usable by all.

8 Digital First Does Not Mean Print Never



- Ensure clean, professional print and export options.
- Support board packets, minutes, and reports in printable formats.
- Let boards choose the right format for the right audience.

9 Public Access Should Be Easy, Accessible, and Inclusive



- Make meetings, minutes, and policies easy to find.
- Support ADA/WCAG and multiple languages.
- Keep your community informed and engaged.

10 Security Isn't Optional



- Protect sensitive data with strong security and role-based access.
- Meet legal and regulatory requirements.
- Maintain audit trails and retention policies.



Key Question: "Which platform will help our board govern better, today and in the future?"