

ICCTA Quick Survey Results -- Board Document Software

October 30, 2024



A total of 18 colleges/districts responded to ICCTA's Quick Survey on BOARD DOCUMENT SOFTWARE.

1. What software, if any, does your college use to compile Board of Trustees documents and materials?	2. Please share the pros and cons of this software.	3. Do your board members utilize this software and what feedback have they provided?	4. Please share any additional comments regarding your institution's use of board document software.
BoardBook Premier -- 1 Lake County	<p>Pros: no paper, no shipping/no waiting on Trustee side, rapid delivery, keeps it all in one place, streamlined collaboration with staff (fewer emails). Easy access to material during meeting without the use of paper copies. With the lead function in BoardBook Premier, Trustees can easily view the material and follow the agenda. Prior to meeting, Trustees can make notes in the tool as they review the material to flag questions or comments. It is also used for the Budget materials. Cost for BoardBook Premier is reasonable.</p> <p>Cons: Since implementing in Spring of 2023 and going live in August 2023, we have not experienced any major cons.</p>	<p>Yes - it is our communication hub for all board material. Generally, the tool has been well received and feedback is positive. With willingness to learn and ask for more training when needed.</p>	<p>We have been pleased with the implementation of the software; it has saved time and college resources. When subscribing to BoardBook Premier, a dedicated representative is assigned to the account to assist with any questions and training. Online training is offered every month and is easy to follow. In addition, PDF training material is available on the site at any time.</p>
BoardDocs -- 2 Lewis and Clark	<p>Excellent! BOT easily transitioned from paper materials to the online materials. Historical documents are easily accessible. For example, our auditors no longer require copies of 12 months of Board minutes, they use BoardDocs.</p>	<p>Yes, they use it. Very few questions or comments.</p>	<p>Another software I use is "Descript" to transcribe the audio of the meetings. It became necessary to have verbatim minutes instead of the traditional summary.</p>
Prairie State	<p>Still figuring things out...more training is necessary, as we have new board members since they were last trained. My goal in FY25. I feel repetition, repetition is key. Once they (Board members) continue to utilize this program, the easier they will find to maneuver throughout. I love the search feature and have great expectations for this program.</p>	<p>Very few utilize this program, I feel that more training will help them move forward in a positive way and feel confident using this program regularly.</p>	

BoardEffect -- 2

Oakton	It's a great tool to keep meeting materials organized; easy to understand, and use. This version is targeted for non-profits and I'm thinking of switching to BoardBooks (also created by Diligent).	Yes, our board members utilize the software but some of them need to be reminded. Most feedback has been positive.	
Richland	<p>Pros - Extremely easy to use, assemble documents and publish agendas. Reduces the use of paper and increases accuracy.</p> <p>Cons - Board still engages minimally with the tool. However, they all use the tool during Board meetings.</p>	Minimally, but they do like it.	Richland has utilized BoardEffects for five years and it has increased communications, improved accuracy and it is sooo much more efficient than paper agendas and materials. Our foundation uses this tool as well so our annual shared cost is about \$5,000

Diligent Community -- 1

Southwestern	We are in the planning phase with an anticipated rollout date in November	They have not utilized the software as yet	Too soon to determine
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Microsoft and/or Adobe -- 9

Carl Sandburg: Microsoft Office	It's easy to use and interchangeable. Most companies and colleges use it as well.	Yes they do. We only have one member that struggles.	None
Elgin: We are still "old school," gathering Word docs and creating a pdf/printed board book			I would like to know how many colleges provide laptops or what technology is provided to their trustees for college business.
Harper: Microsoft Teams	<p>Pros - shared document space where multiple users can interact during packet creation and collateral documents.</p> <p>Cons - version control can be difficult at times with multiple users uploading multiple documents.</p>	Our board does not utilize this software.	We are researching potential digital solutions that focus specifically on managing board documents.
Heartland: SharePoint	Relatively easy to use (pro), no approvals for changes and limited tracking of changes	No	Interested to hear the results of this survey!
Illinois Valley: Word and Adobe	It is standard--nothing fancy. We still do paper books for everyone.	n/a	I am very interested to know if others use something specific and if it would eliminate the hard copy books.
Kaskaskia: Microsoft Word and Adobe	Easy to edit, put problematic when paginating when late or last minute submissions need to be added.	N/A	Would welcome a best practice or software recommendations that are simple to use and edit

Lake Land: We use Adobe Acrobat Pro to create the monthly board book, materials, and the online version of our official board policy manual.	Adobe Acrobat Pro is easy to use and to make revisions/updates.	Board members only review the documents, and we have not received any negative feedback regarding its use.	We have looked into and considered other software options but do not feel the cost of them is necessary for our purposes at this time.
Sauk Valley: Word/PDF docs	Pro: Routine, easy to do from month to month. Con: Probably takes longer than an actual software program.	No	We have explored software from time to time and have decided not to change.
Shawnee: Documents are created in MS Word and then converted in Adobe Acrobat. We create links/bookmarks in Word, which makes navigation between documents very easy.	Pros - Affordable Cons - Advanced feature of both software programs require a learning curve.	Yes, the Board uses the Acrobat versions of the Board Book and attached documents. Most love the ease in which they can quickly access materials needed for decision-making.	Here's a link to our Board documents. https://shawneecc.edu/about/board-of-trustees/meetings/

OnBoard -- 1

Waubonsee	Pros: no more paper! As an OnBoard administrator for our group, I can assist with resetting passwords, etc. We can share documents for board, committee, or other meetings, in OnBoard. We selected this software because it's very user friendly. We can update/replace/add documents to the board book very quickly and easily. OnBoard can be accessed via their app or on the web. Cons: there are occasional technical glitches due to updates to the software, their iPad, etc.	Yes. We introduced the OnBoard portal to our board in September 2019. Our board members were open to the idea of an electronic board book (that eliminated all the copies and the time we spent creating the thick monthly board packets that were delivered to their homes). Our board members are provided with college-issued iPads that they can take home so they can review their board books anytime. They seem to be happy with the product. Our Foundation Board also uses OnBoard for their meetings.	It was the best move we made, going from paper to digital!
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PEAK Agenda Management by Granicus -- 1

DuPage	Pros: Easy to use and has an approval workflow that allows for multiple reviewers simultaneously. Also, easy to post and distribute the packets. Cons: hard to insert graphs into the write-up, but have workaround to add as an attachment instead.	Not yet.	The implementation of the software has been one of the highest rated implementation process by users because it is very user friendly.
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None -- 1

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For more information, please contact:

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