



**AGENCY HELP MANUAL FOR THE
BOARDMATCH® FUNDAMENTALS SYSTEM**

For more information visit www.boardmatch.org, or
e-mail your local BoardMatch Fundamentals office via Contact Us.

Table of Contents

1.1	Registering as a Charity or Not For Profit Organization.....	3
1.2	Logging in as a Charity or Not For Profit Organization	6
1.3	Viewing and editing your information	6
1.4	Position Management.....	7
1.4.1	Creating a new posting for board members	8
1.4.2	Viewing current postings for board members	10
1.4.3	Editing and closing a posting.....	10
1.4.4	Searching and inviting board members	11
1.4.5	Viewing applicants and updating their status.....	12

1.1 Registering as a Charity or Not For Profit Organization

To register as a Charity or Not For Profit Organization click the **Sign Up** button on the **Login** page as shown in the screenshot below. The Login page can be reached by clicking the **Log in/Sign up** button located on the right side of the blue menu.

The screenshot displays the BoardMatch Fundamentals + Canada website. At the top, there is a navigation menu with links for Program Overview, Search Positions, Participating Organizations, Candidate FAQs, Organization FAQs, and Log in / Sign up. The main content area is divided into two sections. The left section is titled 'Log In' and contains a form with fields for User Name (with an example: e.g. username@email.com) and Password, a 'Forgot your password?' link, a checkbox for 'Keep me logged in for 1 day unless I log out.', and a 'Log in' button. The right section contains two registration options. The first is for 'Charity or Not For Profit Organization' with a 'Sign up' button. The second is for 'Candidate' with a 'Sign up' button. The footer includes a navigation menu with links for Home, Help, Legal, Donors & Sponsors, E-Donations, Contact Us, Testimonials, Downloads, Related Links, and News, along with the Altruvest Charitable Registration #: 892814161RR0001.

The screenshot excerpts shown below are from the registration page. Complete the form by filling out all required fields, and click the **Submit** button to save your information.

BOARDMATCH
FUNDAMENTALS CANADA
A PROGRAM OF ALTRUVEST CHARITABLE SERVICES

Stronger Leaders
Stronger Charities
Stronger Communities

Program Overview • Search Positions • Participating Organizations • Candidate FAQs • Organization FAQs Log in / Sign up

Note: The BoardMatch Fundamentals program is currently available in Calgary, Fredericton, the Greater Toronto Area, Greater Vancouver, and Thunder Bay. We hope to expand to other city centers across Canada in the next few years.

Login Information

* Primary Email:
The e-mail address will also be your username.

* Password:
Your password must be at least 6 characters long.

* Confirm Password:

Submit Cancel

Home • Help • Legal • Donors & Sponsors • E-Donations • [Contact Us](#) • Testimonials • Downloads • Related Links • News

Altruvest Charitable Registration #: 892814161RR0001

When you have saved your information, you will be redirected to the **Organization Portal**, shown below. This portal will contain the remainder of your registration process, and upon completing the registration process, the Organization Portal will be your gateway for viewing and editing your information and postings, viewing your orientation modules and other e-learning module, and searching for potential board members.

In the screenshot below, completed registration processes are denoted by the blue colored boxes; incomplete registration processes are denoted by the red colored boxes, and require attention. To complete a registration process, click the icon or title of the appropriate registration box, and complete the given forms. When you complete a process, the next sequential grey colored box will be made available to the user.

BOARDMATCH FUNDAMENTALS CANADA
A PROGRAM OF ALTRUVEST CHARITABLE SERVICES

Stronger Leaders
Stronger Charities
Stronger Communities

Home • Program Overview • Search Positions • Participating Organizations • Candidate FAQs • Organization FAQs • Log out

Welcome test@organization.com!

Note: You will be able to create and post open board positions with the BoardMatch Fundamentals system only after completing the 4 required registraion steps listed below.

Registration Process

Steps Completed 1/4

Click on a link below to complete the associated registration task.

- 1 Organization Details
- 2 Position Matching Information
- 3 Orientation
- 4 Release Form

The BoardMatch Fundamental **Orientations** are available online as well as through an instructor-led classroom session (you can check the dates for upcoming sessions by visiting this [link](#)). Your organization is required to complete the orientation session through either means mentioned above, but not both. If you have already taken an in-class session, you do not have to take it again online unless you wish to review it. Please send an email to the local BoardMatch Fundamentals office indicating the date and city in which you took the orientation, and the BoardMatch Fundamentals administrator will update your information to reflect that you have already completed it. If you are reviewing the orientation and do not wish to read all the pages, you can complete the process by advancing to the last page of the module.

The **Release Form** is the final step of the registration process. You will be required to agree to a liability release form in order to complete the step. The Release, Terms and Conditions, and Privacy Policy can be viewed in the **Downloads** section as shown below. Only when you have agreed to the Terms and Conditions will your registration process be complete.

Password:

[Forgot your password?](#)

Keep me logged in
for 1 day unless I log out.

In order to use the BoardMatch Fundamentals program, you must register as a new **Candidate**.

[Home](#) • [Help](#) • [Legal](#) • [Donors & Sponsors](#) • [E-Donations](#) • [Contact Us](#) • [Testimonials](#) • [Downloads](#) • [Related Links](#) • [News](#)

1.2 Logging in as a Charity or Not For Profit Organization

To log in, enter your user name (email) and password, and click the **Log in** button. If you want the application to remember your user name and password for a day, select the check box labeled **Keep me logged in**. This feature saves your login information on your computer for one day, and allows you to bypass the login page.

BOARDMATCH
FUNDAMENTALS + CANADA
A PROGRAM OF ALTRUVEST CHARITABLE SERVICES

Stronger Leaders
Stronger Charities
Stronger Communities

Program Overview • Search Positions • Participating Organizations • Candidate FAQs • Organization FAQs Log in / Sign up

Log In

User Name:
(e.g. username@email.com)

Password:
[Forgot your password?](#)

Keep me logged in
for 1 day unless I log out.

In order to use the BoardMatch Fundamentals program, you must register as a new **Charity or Not For Profit Organization**.

In order to use the BoardMatch Fundamentals program, you must register as a new **Candidate**.

Home • Help • Legal • Donors & Sponsors • E-Donations • Contact Us • Testimonials • Downloads • Related Links • News

Altruvest Charitable Registration #: 892814161RR0001

If you forget your password, click the **Forgot your password** link. This will bring up a form where you will be required to enter the email address that you registered with. After clicking **Reset Password**, an email containing a new password will be sent to the specified email. It is highly recommended that you change your password the next time you log in.

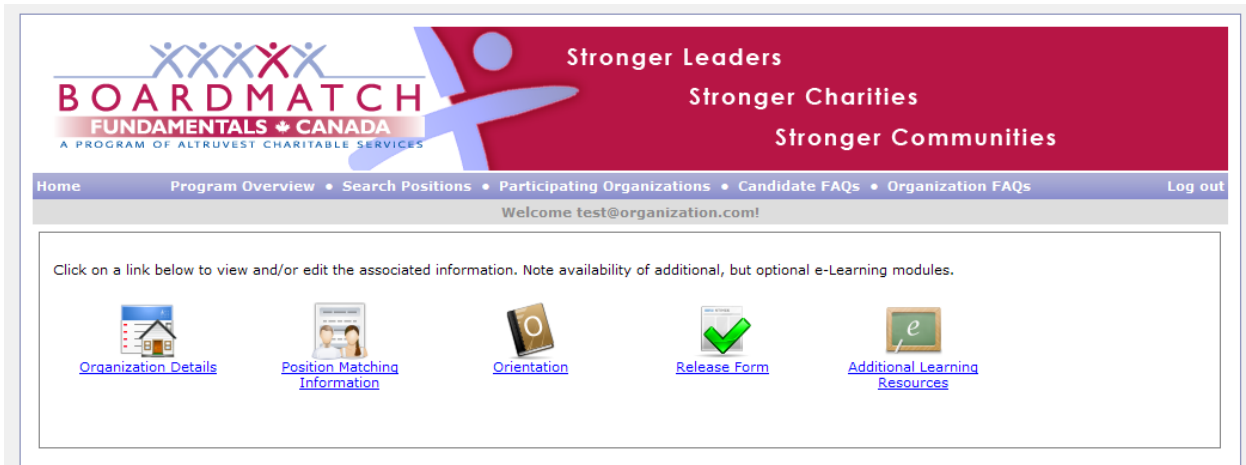
Reset My Password

Please enter your user name/primary email. An email containing your new password will be sent to you.

Primary Email:

1.3 Viewing and editing your information

On your Organization Portal, select the icon or title of the item you wish to view and/or edit. Click the **Submit** button when you have finished making your changes to save your changes.



Stronger Leaders
Stronger Charities
Stronger Communities

Home Program Overview • Search Positions • Participating Organizations • Candidate FAQs • Organization FAQs Log out

Welcome test@organization.com!

Click on a link below to view and/or edit the associated information. Note availability of additional, but optional e-Learning modules.

[Organization Details](#) [Position Matching Information](#) [Orientation](#) [Release Form](#) [Additional Learning Resources](#)

To access the BoardMatch Fundamentals orientation and training, click the icons labeled Orientation and Additional Learning Resources, respectively. The Additional Learning Resources includes information on Candidate Orientation, Voluntary Sector Organization Orientation, Human Resources Planning, and Fundraising Fundamentals for the Voluntary Sector.

The BoardMatch Fundamentals Orientation for Voluntary Sector Organizations contains the following information:

- An introduction to Altruvest Charitable Services
- What BoardMatch Fundamentals is and how to use it to recruit board members
- An overview of the not-for-profit sector, volunteerism and funding
- An understanding of the BoardMatch Fundamentals Orientation for Candidates
- An overview of the BoardMatch Fundamentals Online system and process
- How to motivate your board and what causes board members to stop participating
- How to develop board member job descriptions
- How to access other information about board governance

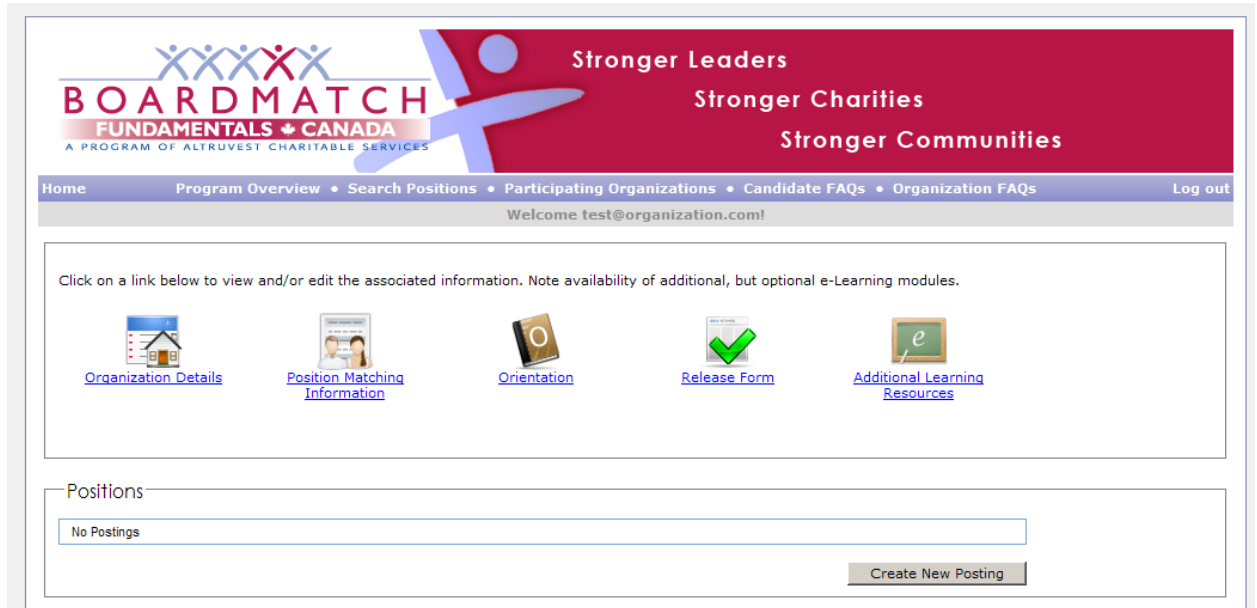
The BoardMatch Fundamentals Orientation for candidates provides the following information:

- An introduction to Altruvest Charitable Services
- An overview of the not-for-profit sector, volunteerism and funding
- Roles and Responsibilities of board members
- Duties and Liabilities of board members
- How to be an effective board member
- How to be a diligent board member
- An overview of BoardMatch Fundamentals Online system and process

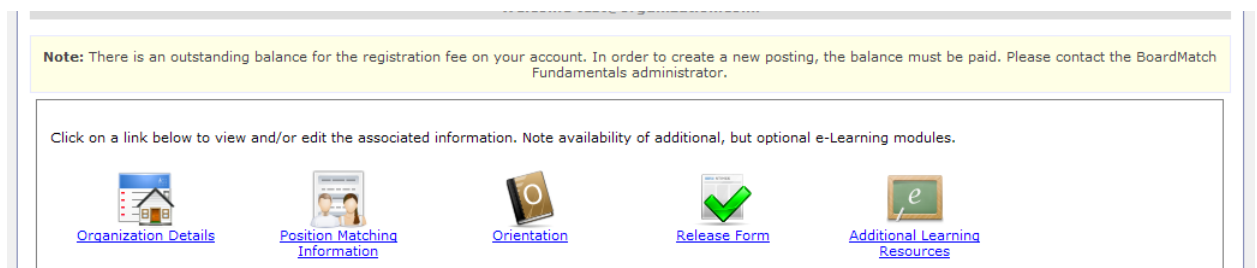
1.4 Position Management

1.4.1 Creating a new posting for board members

To create a new posting, click the **Create New Posting** button located in the Organization Portal. This process can be repeated as many times as necessary for your needs.



If you do not see the Create New Posting button, there may be a message in a yellow colored box indicating that you have an outstanding balance for the registration fee which must be paid before continuing. If you do not see this message, then your account may be disabled and you should contact the BoardMatch Fundamentals administrator for assistance.



After you click Create New Posting, you will be redirected to the page shown below. Complete all necessary fields and click the **Save** button to create the posting.

If you wish to have the system automatically expire the posting after a given time, select an option from the drop down list. If there is any specific qualifications or requirements for the posting, you can list them in the given text box. Note that listing specific qualifications or requirements may reduce the number of applicants, as they may feel they do not meet these specifics.

New/Edit Posting

* Board Position:

* Please select areas of expertise:

<input type="checkbox"/> Accounting	<input type="checkbox"/> Community Development	<input type="checkbox"/> Education
<input type="checkbox"/> Entrepreneur	<input type="checkbox"/> Finance	<input type="checkbox"/> Fundraising
<input type="checkbox"/> Management	<input type="checkbox"/> Human Resource	<input type="checkbox"/> Health Professional
<input type="checkbox"/> Information Systems	<input type="checkbox"/> Marketing	<input type="checkbox"/> Organizational Planning
<input type="checkbox"/> Project Management	<input type="checkbox"/> Social Service	<input type="checkbox"/> Website Development
<input type="checkbox"/> Legal	<input type="checkbox"/> Other	

Expire posting in:

Do you have any special requirements for this position i.e., accounting designation, work or residence in a specific geographical area, etc?
(List a requirement here only if it is absolutely necessary.)

If you wish to add an area of expertise that is not listed, you may select the **Other** check box, and specify the details.

<input type="checkbox"/> Information Systems	<input type="checkbox"/> Marketing	<input type="checkbox"/> Organizational Planning
<input type="checkbox"/> Project Management	<input type="checkbox"/> Social Service	<input type="checkbox"/> Website Development
<input type="checkbox"/> Legal	<input checked="" type="checkbox"/> Other	

Please specify

Do you have any special requirements for this position i.e., accounting designation, work or residence in a specific geographical area, etc?
(List a requirement here only if it is absolutely necessary.)

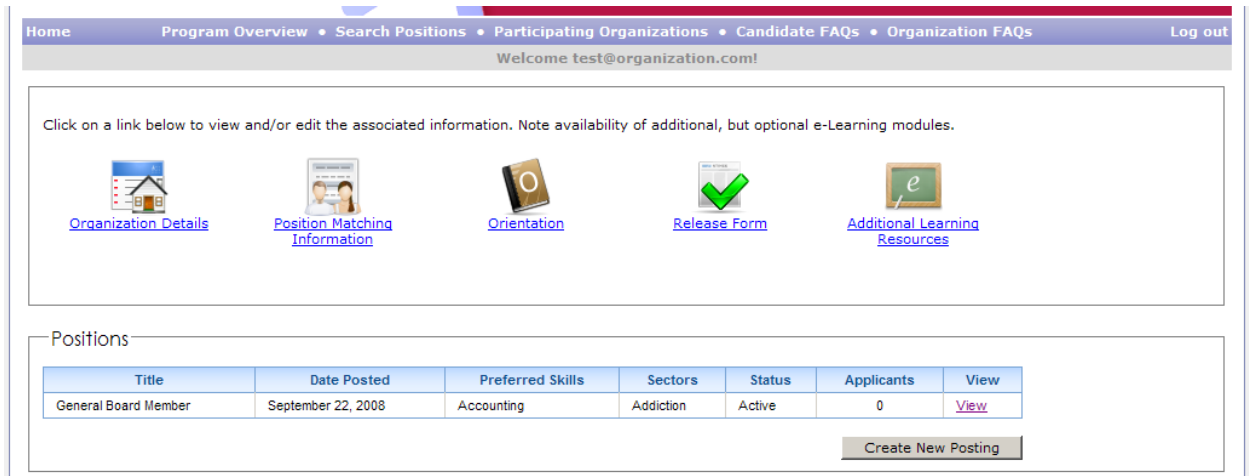
test

You may modify your posting later if you wish to make it more appealing to people from the business community and the community at large.

It is recommended that you post a separate board position for each position/skill set you require. A single posting with too many skills tend to scare away board members since they may think that they are expected to have all of the listed skills rather than just some of them.

1.4.2 Viewing current postings for board members

To view a current posting, navigate to the Organization Portal and click the **View** button next to the desired position in the Positions group box shown below.



Home Program Overview • Search Positions • Participating Organizations • Candidate FAQs • Organization FAQs Log out
Welcome test@organization.com!

Click on a link below to view and/or edit the associated information. Note availability of additional, but optional e-Learning modules.

[Organization Details](#) [Position Matching Information](#) [Orientation](#) [Release Form](#) [Additional Learning Resources](#)

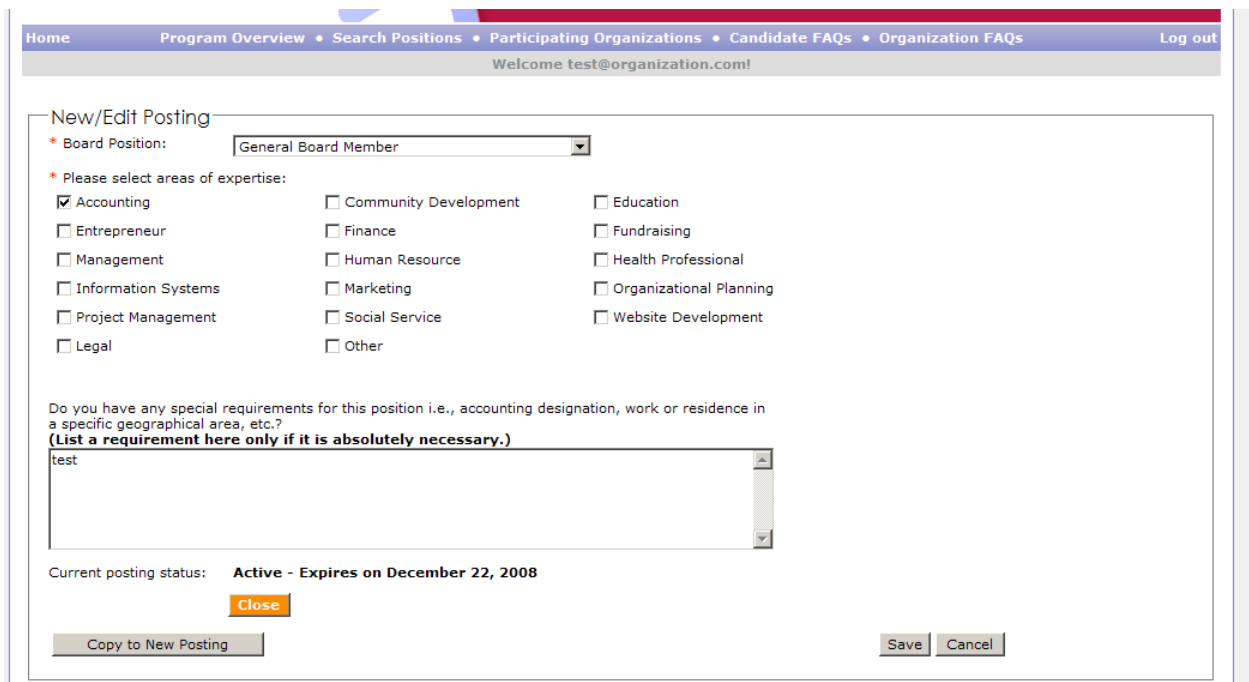
Positions

Title	Date Posted	Preferred Skills	Sectors	Status	Applicants	View
General Board Member	September 22, 2008	Accounting	Addiction	Active	0	View

Create New Posting

1.4.3 Editing and closing a posting

Make any necessary changes and click the **Save** button to edit your posting.



Home Program Overview • Search Positions • Participating Organizations • Candidate FAQs • Organization FAQs Log out
Welcome test@organization.com!

New/Edit Posting

* Board Position:

* Please select areas of expertise:

<input checked="" type="checkbox"/> Accounting	<input type="checkbox"/> Community Development	<input type="checkbox"/> Education
<input type="checkbox"/> Entrepreneur	<input type="checkbox"/> Finance	<input type="checkbox"/> Fundraising
<input type="checkbox"/> Management	<input type="checkbox"/> Human Resource	<input type="checkbox"/> Health Professional
<input type="checkbox"/> Information Systems	<input type="checkbox"/> Marketing	<input type="checkbox"/> Organizational Planning
<input type="checkbox"/> Project Management	<input type="checkbox"/> Social Service	<input type="checkbox"/> Website Development
<input type="checkbox"/> Legal	<input type="checkbox"/> Other	

Do you have any special requirements for this position i.e., accounting designation, work or residence in a specific geographical area, etc?
(List a requirement here only if it is absolutely necessary.)

test

Current posting status: **Active - Expires on December 22, 2008**

To close your posting, click the yellow **Close** button. When your posting is closed, it is no longer available to board members for applications. If you wish to undo the close or renew the posting,

select an appropriate expiry date and click the green **Renew** button. The Renew button is only available on closed postings.

(List a requirement here only if it is absolutely necessary.)

test

Current posting status: **Expired on September 23, 2008**

Renew

Copy to New Posting Save Cancel

If you wish to create a new posting based on the current one, click the **Copy to New Posting** button. This will create a copy of the current posting which you can modify before saving. Since it is a copy, it will be listed as an additional item in the listing of positions on your Organization Portal.

1.4.4 Searching and inviting board members

To search for a board member, use the **Candidate Search** located below the listing in Applicants/Invitations. Specify the desired search criteria and then click the **Search** button, and the search results will be displayed in a paginated grid as shown below. You can click on the page numbers to scroll through the pages of the search results.

Search

Last Name	First Name	Address	Employer	View
Gidwaney	Nina	Suite 2504, 1100 - 8th Avenue SW, Calgary	Canaccord Adams	View
Tomsics	Susan	xxxx, Calgary	Consulting/Contracting	View
Banderk	Lana	12 Valley Woods Way NW, Calgary	Rangeland Pipeline Partnership	View
Johnson	Robert	35 Richard Court SW, Calgary	Deloitte & Touche LLP	View
Cochran	Colin	111 Lake Mead Place SE, Calgary	Imperial Oil Ltd	View
Coutts	Randy	240 Coral Springs Mews NE, Calgary	RBC Royal Bank	View
Cuthbertson	Laura	127 Bears paw Village Cres, calgary	SAIT	View
Chaudhuri	Esha	5711 Dalhousie Dr NW, Calgary	Dr. E. Chaudhuri	View
Deadman	Tara	86 Evansmeade Manor NW, Calgary	BP Canada Energy Company	View
Dorrius	Peter	115 13 Ave NE, Calgary	Guest-tek Interactive Entertainment, Ltd	View

1 2 3 4 5 6 7 8 9 10 ... >

If you wish to view a board member's details, click the **View** button. A pop-up window will be displayed, showing the board member's qualification and position matching information. The board member's resume can also be viewed from the pop-up window. The board member can be invited for the selected position by clicking the **Invite** button.

bernard cheng

Qualifications

* Highest level of education completed: Highschool Community College University Undergraduate University Post Graduate

Name of educational institution from which you received your highest degree/diploma:

Certification/Professional designation:

Area of Study:

* Employer:

Yes, this is my current employer.

* Job Title:

Text only Resume:
Please do NOT include any contact information in your resume.

* Please describe any previous volunteer experience you have:

Fundraising Program Delivery Special Event

Other

* Why are you interested in serving on a board of directors? What are your personal and professional goals that you feel serving on a board may fill? Why now?

Maximum 500 words.

* Please specify any preferences about the geographical area where you would like to volunteer:

Yes, I permit participating organizations in BoardMatch Fundamentals to view my registration information and background and invite me to interview with them.
The candidate search functionality by organizations is in addition to the candidates' choice to apply to positions of interest to them.

I no longer wish to participate in the automated matching service.
The automated matching service notifies you via e-mail of new positions that match your skills and interests.

1.4.5 Viewing applicants and updating their status

A listing of applicants can be found upon selecting a posting to be viewed.

Click on a link below to view and/or edit the associated information. Note availability of additional, but optional e-Learning modules.



[Organization Details](#)



[Position Matching Information](#)



[Orientation](#)



[Release Form](#)



[Additional Learning Resources](#)

Positions

Title	Date Posted	Preferred Skills	Sectors	Status	Applicants	View
General Board Member	July 24, 2008	Accounting, Entrepreneur	Addiction	Active	1	View
Vice Chair	July 24, 2008	Accounting, Entrepreneur	Addiction	Expired	0	View
Secretary	July 24, 2008	Accounting, Entrepreneur	Addiction	Active	0	View
General Board Member	July 24, 2008	Accounting, Entrepreneur, Management	Addiction	Active	0	View
General Board Member	July 24, 2008	Accounting, Entrepreneur, Management, Information Systems, Project Management, Legal	Addiction	Expired	0	View
Treasurer	July 24, 2008	Accounting, Entrepreneur, Management, Information Systems, Project Management, Legal	Addiction	Closed	0	View
Treasurer	July 24, 2008	Accounting, Entrepreneur, Management, Information Systems, Project Management, Legal	Addiction	Active	0	View
General Board Member	July 24, 2008	Accounting, Entrepreneur, Management, Information Systems, Project Management, Legal	Addiction	Active	0	View
Secretary	July 24, 2008	Accounting, Entrepreneur, Management, Information Systems, Project Management, Legal	Addiction	Active	0	View
Treasurer	July 24, 2008	Accounting, Community Development, Education, Entrepreneur, Finance, Fundraising, Management, Human Resource, Health Professional	Addiction	Active	0	View

1 2 3

The list is located in the **Applicants/Invitations** group box, and the number of applicants is also reflected in the listing of positions on the Organization Portal. This list of applicants and invitations will be updated whenever an invitation is sent out and whenever a board member has applied for the posted opening. In addition, you will be informed of applicants and invitations via email.

Applicants / Invitations

Last Name	First Name	Employer	Status	Change Status	Edit
cheng	bernard	test	Candidate Decline - Accepted Another Position	Change Status	View Details

To view the details of an applicant or invitation, click the **View Details** button. Here you will view the same information as shown in the pop-up window from the Candidate Search, including the board member's resume. If you wish to change the status of the applicant, click the **Change Status** button. The pop-up window shown below will be displayed, and you will be required to select an appropriate Application Status by clicking the corresponding **Select** button. The update will also be reflected in the Candidate Portal and will be visible to the board member.

If a position was filled by BoardMatch Fundamentals, we ask that you inform BoardMatch Fundamentals by updating the applicant's status to **Offer Extended**. In the case where the position was filled by external means, we ask that you update the applicant's status accordingly.

bernard cheng

Current Application Status : Candidate Decline - Accepted Another Position

Please click on one of the following choices to change the applicant's status and to select the e-mail that will be sent to him/her. You can view any of the selections by clicking on them - the status will only be changed when you click on the 'Submit' button at the bottom of the screen.

	Status	Description
Select	Decline - Position already filled	By selecting "Under Review," you can take 1-2 weeks to review and discuss a board candidate's resume. After 1-2 weeks, you should return to BoardMatch Fundamentals and change the candidate's status to "Interview" or "Decline"
Select	Decline - Qualifications do not meet	By selecting "Under Review," you can take 1-2 weeks to review and discuss a board candidate's resume. After 1-2 weeks, you should return to BoardMatch Fundamentals and change the candidate's status to "Interview" or "Decline"
Select	Decline - After Interview	By selecting "Under Review," you can take 1-2 weeks to review and discuss a board candidate's resume. After 1-2 weeks, you should return to BoardMatch Fundamentals and change the candidate's status to "Interview" or "Decline"
Select	Interview	By selecting the "Interview" option, you are informing the candidate of your desire to interview them. Please contact the candidate directly to set up a mutually convenient meeting time
Select	Offer Extended	By selecting "Offer Extended," you are indicating that your agency has already met with the candidate and that you now want to extend an offer to the candidate
Select	Under Review	By selecting "Under Review," you can take 1-2 weeks to review and discuss a board candidate's resume. After 1-2 weeks, you should return to BoardMatch Fundamentals and change the candidate's status to "Interview" or "Decline"

E-Mail to Candidate

In addition, you can send an email with a personal message to the board member by filling out the boxes as shown below. To save your changes and send the email, click the **Save** button.

bernard cheng

E-Mail to Candidate

Subject:

Message:

Custom Message
By using the following space you can add a personal message to the above e-mail [Optional]

Message:

Check this box if you want to receive a copy of this email.