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.

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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 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.

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.

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.

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.

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.
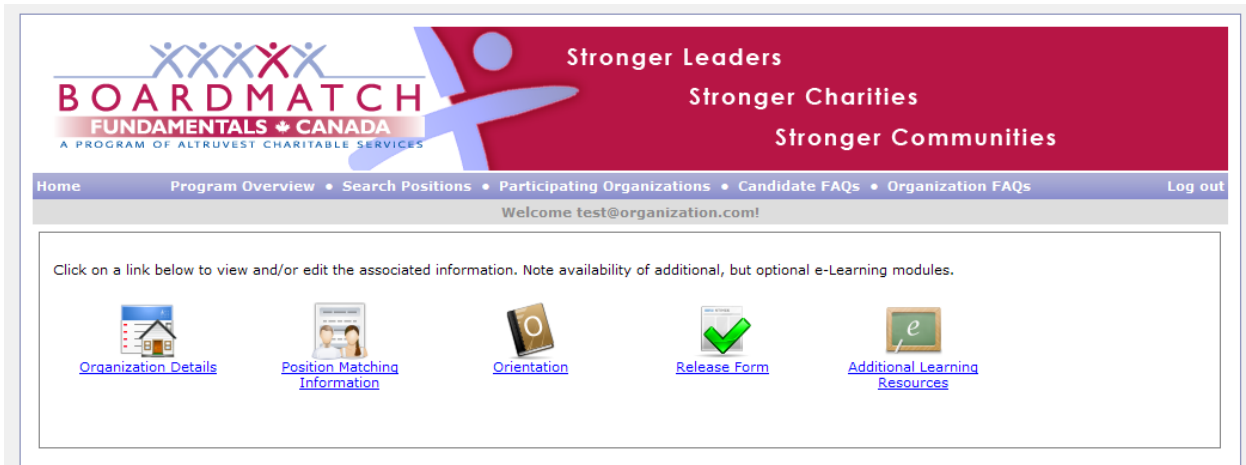

1.3 Viewing and editing your information

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.

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.
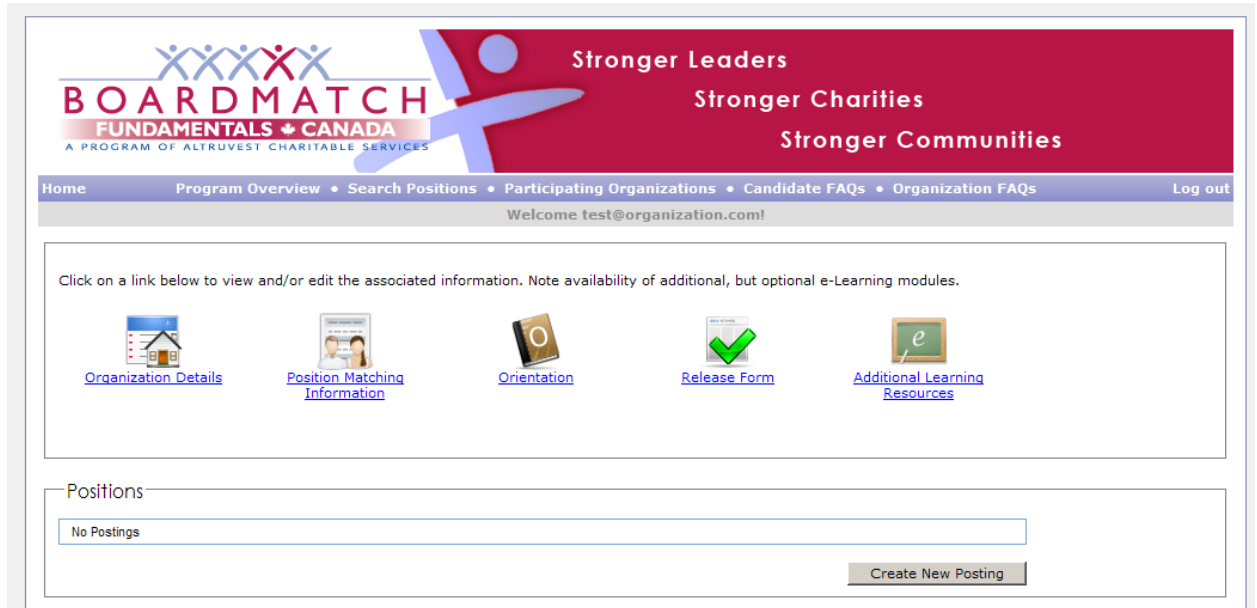
If you do not see the Create New Posting button, there may be a message in a yellow colored box indicating that you have an outstanding balance for the registration fee which must be paid before continuing. If you do not see this message, then your account may be disabled and you should contact the BoardMatch Fundamentals administrator for assistance.
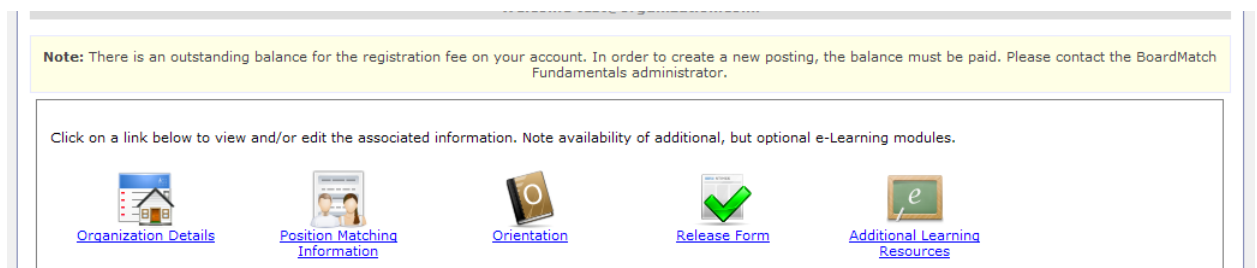
After you click Create New Posting, you will be redirected to the page shown below. Complete all necessary fields and click the **Save** button to create the posting.

If you wish to have the system automatically expire the positing 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: Select one...   ▼

* Please select areas of expertise:

☐ Accounting   ☐ Community Development   ☐ Education
☐ Entrepreneur   ☐ Finance   ☐ Fundraising
☐ Management   ☐ Human Resource   ☐ Health Professional
☐ Information Systems   ☐ Marketing   ☐ Organizational Planning
☐ Project Management   ☐ Social Service   ☐ Website Development
☐ Legal   ☐ Other

Expire posting in: 3 Months   ▼

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.)

[text area]

[Save] [Cancel]

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

☐ Information Systems   ☐ Marketing   ☐ Organizational Planning
☐ Project Management   ☐ Social Service   ☐ Website Development
☐ Legal   ☑ 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.?
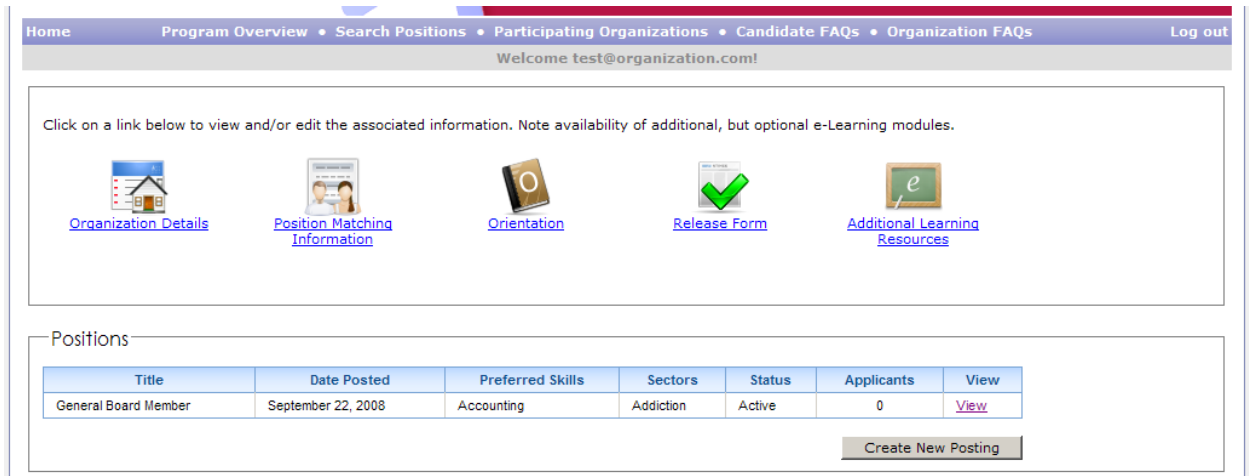**(List a requirement here only if it is absolutely necessary.)**

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.

1.4.3 Editing and closing a posting

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

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.

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.

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.

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.

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.