



The Board Portal

A secure central hub for volunteer leaders and management
to support alignment, strategic focus and continuous improvement

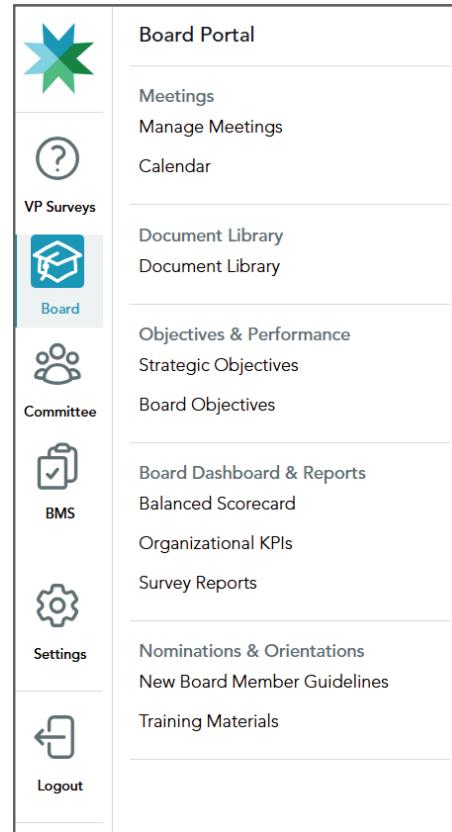


Board Portal

Empower your board, align committees, and manage club initiatives all from a single source of truth in the VISTA platform's Board Portal. Using our simple suite of tools, you can ensure transparency, accountability, and value. The Club Benchmarking Board Portal, available in the Summit subscription plan, functions as a hub for business planning, board, committee and department goals, special projects, performance reviews, meeting details, surveys and votes.

MEETING MANAGEMENT

- Create meetings with agendas, documents, actions, and voting items quickly
- Manage and track all aspects of voting and poll any size group
- Export meeting-ready agendas with club branding, presenters, participants and documents
- Customizable meeting calendar
- Generate post-meeting minutes with one click including follow up for individual assignments



The screenshot shows the Vibe app interface for a sample board meeting. The top navigation bar includes a logo, the title "Manage Meetings", and a "Return to overview" button. The main content area displays the meeting agenda with the following sections:

- Agenda**: Includes "Call to Order, Welcome, Agenda Review" (5 min, 0 presenters).
- 2. Member Comment**: Includes "Member Comment" (10 min, 0 presenters).
- 3. Consent Agenda**: The current section, showing "Approve March 5, 2026 minutes (A1)" (10 min, 4 presenters). It includes a "Vote" section with radio buttons for "yes", "no", and "abstain".
- 4. Key Metrics & Operations Dashboard**: Shows "Key Metrics & Operations" (15 min, 0 presenters).

On the left sidebar, there are icons for "VP Surveys", "Board", "Committee", "Settings", and "Logout". The "Agenda" section is currently selected, indicated by a blue background.

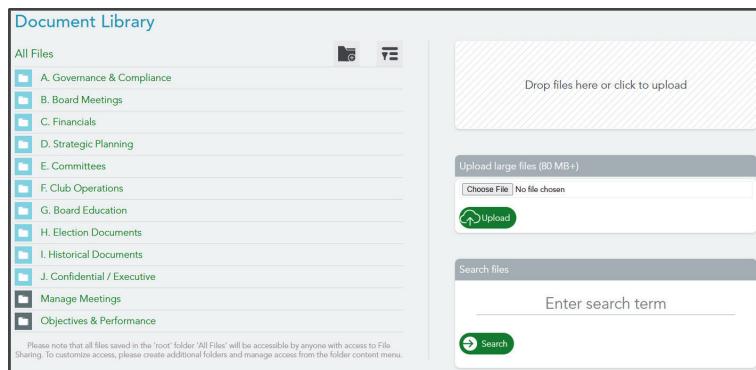
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OBJECTIVES & PERFORMANCE

- Organizes strategic, board and committee objectives
- Features include timelines, progress tracking with automatic roll-up to higher-level goals and overview of task assignments
- Monitor workload, progress, and accomplishments
- Balanced Scorecard performance tracking covers member satisfaction, staff development, financial performance and operational goals

DOCUMENT LIBRARY

- Drag-and-drop, secure, customizable file management system, houses board folders, bylaws, and other materials
- Powerful search engine locates your files by title or words within the content
- Robust administrative controls support flexible sharing permissions



BOARD DASHBOARD AND REPORTS

- Balanced Scorecards
- KPI templates are customizable and available for various roles
- Organizational KPIs integrate with databases for real-time benchmarking of critical metrics (e.g., Net Promoter Score)
- Dynamic survey reporting

COMMITTEE MANAGEMENT SECTION

- Committee-specific tools and resources
- Manage meetings and access calendars
- Document library access
- Objectives and performance section organizes committee objectives including timelines, progress tracking with automatic roll-up to higher-level goals and overview of task assignments



Learn more about the Board Portal

www.clubbenchmarking.com/board-portal

