



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

	Board Portal
	Meetings
	Manage Meetings
	Calendar
	Document Library
	Document Library
	Objectives & Performance
	Strategic Objectives
	Board Objectives
	Board Dashboard & Reports
	Balanced Scorecard
	Organizational KPIs
	Survey Reports
	Nominations & Orientations
	New Board Member Guidelines
	Training Materials



Manage Meetings

Sample Board Meeting (02/24/2026) ... [Return to overview](#)

1. Call to Order, Welcome, Agenda Review
5 min 0 0 0
No presenters yet

2. Member Comment
10 min 0 0 0
No presenters yet

3. Consent Agenda
10 min 0 4 0
No presenters yet

4. Key Metrics & Operations Dashboard
15 min 0 0 0
No presenters yet

3. Consent Agenda

Description

Decision Required: Approve items as a single vote unless pulled.

- Approve March 5, 2026 minutes (A1)
- Acknowledge committee reports filed (Finance, Greens, House)
- Approve routine vendor renewals under \$10,000: linen service renewal (\$7,800); software maintenance (\$6,250)
- Ratify March emergency repair: walk-in cooler compressor (\$9,450)

Suggested Motion: "Move to approve the consent agenda as presented."

Documents

No documents added yet

Actions

Vote

Approve March 5, 2026 minutes (A1)

yes ☐

no ☐

abstain ☐

Update action

Vote

Acknowledge committee reports filed (Finance, Greens, House)

Update action

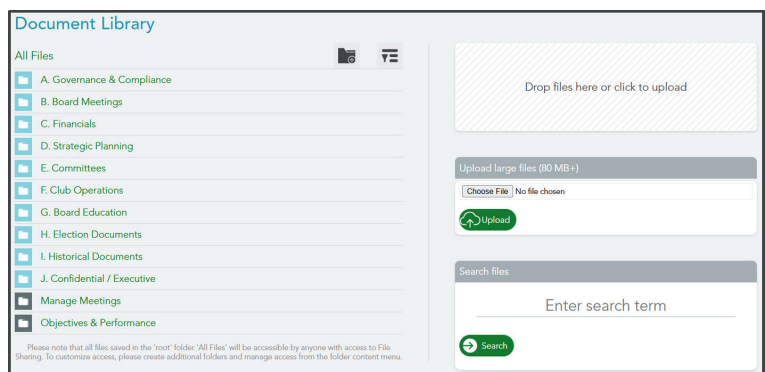
Board Portal

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

