The Importance of Boardroom Technology for Higher Education Institutions

The boards of higher education institutions face the challenge of navigating a complex array of risks that include reputation, litigation, loss of support in the wake of a scandal, and cybersecurity while trying to grow and foster their institutions.

To mitigate these risks, higher education institution boards today are turning to digital technologies to help their trustees stay better connected, engaged and up-to-speed. Boardroom technology offers the promise of improved communication, governance, security and collaboration, which are all vital for a higher education institution board to succeed with the institution's mission.

"Board portals," as they are commonly referred to, are collaborative software tools that allow board trustees and administrators to securely access board documents in order to collaborate and communicate. While that traditional definition worked yesterday, it's time to rethink and redefine "board portals." Today's governance management software does much more than provide basic repositories of board documents and data.

Board *Effect*

Many boards of higher education institutions are looking to tap into governance management software providers, but they also have pressing questions:

- **How do these vendors measure up against each other?**
- **To what extent can the provider meet our institution's specific governance goals?**
- **What is the provider's expertise with respect to higher education institution boards?**
- **What is the solution's level of security, ease of use, support, etc.?**
- **Will my board use the technology?**

This BoardEffect report examines the challenges that boards of higher education institutions face, makes the case for adopting innovative boardroom technology and indicates what to look for when evaluating providers.

Challenges for Higher Education Institution Boards

Board trustees for higher education institution boards are facing complicated challenges, which is added pressure for those serving in a volunteer role. Challenges include:

- **Public campus scandals** — These scandals put more pressure on college trustees to respond (quickly) in times of crisis and to answer for the actions (or the non-actions) of the campus.
- **Financial pressures** — Colleges face financial difficulties and competition while students and parents expect quality education for the increasing amount of money spent on tuition.
- **Compliance with privacy issues** — New federal regulations, as well as global ones like the Global Data Protection Regulation (GDPR), will impact the way higher education organizations manage their own data and protect individuals' private data.
- **Competition from online learning organizations** — Many students are turning away from traditional higher education institution campuses and instead choosing online education.
- **Campus safety** — Board trustees must also discuss and respond to safety issues on campus; these issues include crime, sexual assault and cybersecurity threats.

Compounding the challenge is the constant rotation of the student population due to students leaving for the summer months and leaving the higher education institution campus altogether when they graduate, typically within 4-5 years.

[1] Damned if You Do, Damned if You Don't, Insider Higher Ed, March 2016

Boardroom Technology Can Help Higher Education Institution Boards

Higher education institution boards today are often finding themselves in a precarious balancing act of immediate- and long-term concerns. Boards need to focus on the long view, but must also factor in pressing short-term issues from stakeholders that may include faculty members, students, staff members, alumni, community and civic groups .

Boardroom technology, if used properly, can be an effective tool for the board to use to deal with these issues — whether short- or long-term — in a collaborative, timely manner. With the average size of college boards at 29 trustees[1] who live in various parts of the country, higher education institution boards must move beyond the inefficiencies of paper-based board packs. Besides the costs of mailing paper board packs, higher education institution boards face the risk of these sensitive documents falling into the hands of somebody who shouldn't be reading them.

However, as discussed, board management software is, and should be, much more than just an online repository that obviates the need for paper-based board packs.

How can board management software cut costs?

Will board management software offer instant access to archived board materials?

Can board trustees securely and digitally communicate without having to use unsecure email?

Let's examine the specific benefits of higher education institution boards adopting board management software.

Benefits of Board Management Software
Greater Security

Think cybercriminals are just targeting corporations?

Higher education institution organizations are also at risk from data breaches and hacks; in fact, 455 cybersecurity incidents occurred in the education sector in 2016, 73 of which resulted in data disclosure[2]. The University of Wisconsin had reported that 90,000 to 100,000 hacking attempts are detected and deflected on that campus every day[3] .

Why target higher education institution organizations?

Colleges and universities house a wide variety of sensitive and lucrative data, including Social Security numbers, financial information, medical records, intellectual property and cutting-edge research. Furthermore, higher education institutions' open-access culture, decentralized departmental or unit-level control, as well as centralized access to data and information, makes them a particularly vulnerable target for unauthorized access, unsafe internet usage and malware. Board management software can provide augmented security now that there is such a proliferation of mobile devices and increased use of the cloud among higher education institution organizations and boards. The boardroom technology you select may allow users to access sensitive data via mobile devices, but it's imperative that the vendor can secure that data access.

Solution evaluation considerations:

- **Look for a provider with robust, advanced security measures.**
- **Select provider with strong user authentication, which plays into mobile and cloud accessibility.**
- **Ask the provider if they have security certifications and are verified by third-party audits.**

Higher education institution board trustees and administrators also need a secure way to communicate because email is not secure and has inherent risks (e.g., hacks, data breaches, phishing, malware). Select a board management solution that can offer a secure way to send and receive documents without having to send email attachments.

Improved Governance

The typical governance structure of higher education institution boards includes positions such as board chair, board directors, secretary, treasurer, CEO, attorneys and managers. Board trustees will frequently accept other positions as part of their duties.

Furthermore, some higher education institution organizations often require their board trustees to chair at least one committee. An executive committee usually acts as a steering committee and will have all of the same powers as the board of trustees[4].

Governance for higher education institutions includes incorporating the orderly involvement of students, employees and citizens-at-large in discussions about new policies, plans and practices. However, higher education institution boards today are finding that they must be more agile to successfully address issues that arise. These issues include scandals involving misconduct and criminal behavior on campus, large-scale protests, litigation and reputational losses.

Board management software should help improve governance so board trustees can more rapidly address issues as they arise, and concentrate their time on the mission and on improving education. Along with greater security, the solution should aim to keep information private and confidential while the board is working on an issue. Therefore, security and governance often work in accord with each other.

What to look for in a provider:

- **Intuitive workflow that helps you advance your organization's mission.**
- **Collaborative features that support the successful management and measurement of strategic priorities.**
- **Single solution that aligns with your board's governance best practices to increase generative thinking around mission fulfillment.**

Ease of Use

Board management software functionality should focus on board trustees to simply and securely access board documents, communicate and collaborate.

However, higher education institution boards may have specific challenges that the technology must address.

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[2] *2017 Verizon Data Breach Investigations Report*

[3] *"The Paperless Board and the Law," Trusteeship Magazine*

[4] *"The Roles and Responsibilities of a Board of Directors for a College or University," BoardEffect Blog*

As an example, some university boards try to cobble together disparate technology solutions, but integration is poor, and this creates complexity. Your board trustees are busy and don't have the time to grapple with difficult and numerous pieces of technology. Board trustees need to be able to go to one place to quickly get the information they need to carry out their role.

Another challenge some higher education institution boards face is requesting the organization's IT team to create their own "board portal." Unfortunately, the so-called "board portals" usually lack functionality, are difficult to use, create security risks and are stagnant technology. These two approaches do not pan out strategically. IT departments are not software companies and don't have the time to manage, train and support all of the board trustees.

As discussed, boardroom management software for higher education institutions should be more than just a repository for documents. Consider a technology provider that includes:

- **Polls, questionnaires, surveys.**
- **Ability for board trustees to create and retain notes.**
- **Electronic signatures.**
- **Supporting different languages.**
- **Cloud and mobile capabilities for greater mobility.**

Overall, the technology needs to be easy to use, have robust functionality and create better efficiency — and not result in greater complexity. It's imperative that you select a solution that is dedicated to the board's needs — and not some provider that does board solutions on the side.

Control and Collaboration

For some university boards, there are multiple committees with members who need to have a certain level of access. How can board administrators give board trustees on certain committees access to specific documents and communications? Currently, administrators need to do this manually and face the challenge of maintaining control and visibility.

University boards also tend to be large, with many board trustees. Board trustees are often very busy and their activity requires follow-up. The challenge here is how board administrators can use technology to get information from different people and distribute the information to specific trustees — all with ease and in a secure manner.

Look for a provider that can empower administrators with that level of control and visibility. You need to select a boardroom technology provider that allows them to give permission to certain board members with certain levels of access.

Seven Recommendations for Board Governance

The Association of Governing Boards of Universities and Colleges released a report to assess the needs for governance changes in higher education institutions. The report provides the following seven recommendations for higher education institution boards to improve board governance:

1. Boards must improve value in their institutions and lead a restoration of public trust in higher education institutions themselves.

2. Boards must add value to institutional leadership and decision-making by focusing on their essential role as institutional fiduciaries.

3. Boards must act to ensure the long-term sustainability of their institutions by addressing changed finances and the imperative to deliver a high-quality education at a lower cost.

4. Boards must improve shared governance within their institutions through attention to board president relationships and a reinvigoration of faculty shared governance. Boards additionally must attend to leadership development in their institutions, for both presidents and faculty.

5. Boards must improve their own capacity and functionality through increased attention to the qualifications and recruitment of members, board orientation, committee composition and removal of members for cause.

6. Boards must focus their time on issues of greatest consequence to the institution by reducing time spent reviewing routine reports and redirecting attention to cross-cutting and strategic issues not addressed elsewhere.

7. Boards must hold themselves accountable for their own performance by modeling the same behaviors and performance they expect from others in their institutions.

Source: Consequential Boards Adding Value Where It Matters Most: Report of the National Commission on College and University Board Governance, Association of Governing Boards of Universities and Colleges

[2] *2017 Verizon Data Breach Investigations Report*

[3] *"The Paperless Board and the Law," Trusteeship Magazine*

[4] *"The Roles and Responsibilities of a Board of Directors for a College or University," BoardEffect Blog*

Questions to ask the vendor:

- **Can administrators set user restrictions so that board trustees and faculty administrators can only access documents in the portal that they really need for official board business?**
- **Can top-level administrators set up admin privileges for individuals in workrooms where they need it without giving them full admin rights over the whole platform (i.e., granular permission for access and actions)?**
- **Does the provider have a secure communications tool that board trustees can access anywhere and on different devices securely?**
- **Is the board management software on a single platform?**

Board directors watch the news for public issues impacting other colleges and universities. The board management software should allow them an easy way to post articles immediately for discussion among trustees. Overall, the solution your higher education institution board selects needs to deliver control and visibility to administrators, as well as promote collaboration among trustees.

Support
The board governance management software solution you adopt must be backed by support in case of questions on integration, adoption, certain features, training, etc. There are some vendors on the market that only provide a paucity of support, while other solutions have no support at all.

Considerations:

- **A solution with 24/7 customer support.**
- **Ongoing training support to ensure product adoption.**
- **Access to resources (e.g., self-service guides, videos, webinars, blogs, white papers).**
- **A solution that will not charge you additional fees when you need help.**

Benefits of Board Management Software
Higher education institution boards are typically large organizations with multiple committees that add to the complexity of managing these meetings, which can typically go for several days. Today, it's crucial for higher education institution boards to evaluate the solutions they deploy to help with improved governance so they can focus on the organization's mission.

BoardEffect is committed to the space and understands the challenges higher education institution boards face and is constantly innovating to meet their changing needs. BoardEffect is solely focused on our board management software that we have created from the ground up; in fact, BoardEffect puts all the benefits of board management software covered in this report into action — whether it is improved governance, security, efficiency, ease of use, collaboration or control. BoardEffect is passionate about the work of higher education institution boards and provides stellar support. We provide 24/7 unlimited access with no extra fees, ongoing training and insightful resources to help you. We have the proven track record, experience, support and expertise so your board of trustees can concentrate on the organization's mission.

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