



## **Streamlining the process of government board and commission management with OnBoard**

**Phyllis Nowlen, Clerk to the Board of County Commissioners in Cleveland County, NC**, is done with phone calls and paper trails, thanks to OnBoard.

Part of Nowlen's job is generating public records reports. "I used to do them by pen and paper - now I just point to them on-line and 'click-click.'" And what used to be a three-week process for board appointments is now an hour or two.

Other clients report similar positive experiences with OnBoard, the one-stop portal to board and commission management. Users can update contact information for board members, track membership, print board books, create mailing lists, run term expiration reports, and much more, including receiving and managing applications online.

Nowlen not only works with the county commissioners -- preparing agendas, taking minutes, and serving as the group's historian -- she also oversees 40 citizen advisory boards. Attracting applicants to serve on those boards once required a long, tedious process. "People used to fill out a survey via Survey Monkey, then contact the board liaison. Then I would pull out my 5-inch binder and get to work with pen and paper. The process was very antiquated, very time-consuming, and it was easy to make mistakes."

With OnBoard, advisory board applicants can easily review specific qualifications for each board, saving Nowlen hours explaining board requirements to inquiring applicants.

When **Christine Rivera, Deputy City Clerk in Las Cruces, NM**, completed the online OnBoard tutorial, it quickly became apparent there was a better way to track the city's 40 boards and commissions, their membership, minutes and meeting notes.

The Excel program Rivera once used was difficult to organize and reports were not easy to generate. More importantly, the information was not available to the public, specifically, to residents interested in applying for a vacant position.

Thanks to OnBoard, "residents can now see whose terms are expiring and they can apply online -- previously everything was on paper," Rivera explains. "It's been so much easier to attract board applicants. They used to come to City Hall to fill out an application, and that meant a huge paper trail."

Not only are residents happy with the online link, but city administrators are also impressed with OnBoard and its ease of use. Once the system was live, Rivera sent a notice to all staff board liaisons explaining how they could view the info and notify her of needed changes. "All I had to do was send them the link."

Rivera also appreciates that OnBoard is Cloud based, which means if the city server is unavailable, she can access the information anytime, from any computer.

Remote hosting was also seen as a plus by **Heidi Brunt, Township Clerk in Middletown, NJ.**

Her office had been using another solution after upgrading from Excel, and while the information was web-based, it was cumbersome. Brunt is responsible for 26 boards and commissions with about 200 members. "Organization was a big need."

She saw an OnBoard demonstration at a conference and was convinced that its ability to organize information and generate reports was much needed. And transferring data from the old software system to OnBoard "was so much smoother than I imagined."

The online application especially has gotten "great feedback from users," she says. Nowlen, too, points to ease-of-use as a plus. "Our applicants have increased exponentially."

Nowlen's office has only used OnBoard for less than a year, but she says it's already made a big impact. "It's made my life so much easier."

**Deputy City Clerk Michelle Hardy in Pawtucket, RI,** agrees. After reviewing other companies' management products, "OnBoard was affordable and easy to use."

Her office once used a large ledger book to keep track of member lists, vacancies and other information related to the city's boards. When they finally upgraded to Excel, that system also failed in terms of organization and easy access. The Office of the Mayor especially was frustrated with the constant search for up-to-date board information, since the Mayor is largely responsible for board appointments.

Already familiar with ClerkBase for records management, Hardy and her office considered OnBoard. "Two other companies did demos, and they showed us programs that were very cumbersome. They were creating more work -- and they were so expensive."

Enter OnBoard. "It was easy to enter data, easy to run reports," says Hardy. "And once we update information, it's automatically updated on the website."

The Mayor's Office is pleased with the easy access and readily available information, and once Hardy and her office tackled the entry of historical records into the OnBoard system, "we caught a lot of errors. Now, it's easy to access information and manage board membership."

"This is why we built OnBoard," explains Jay Rosenfield of ClerkBase. "We listened to clerks, managers, and board management staff. There was nothing in the market that allowed them to efficiently manage boards and commissions, so we built OnBoard to address those specific needs. It's gratifying to see how successfully the solution is working for our clients."

Since launching OnBoard, ClerkBase has also created an add-on module to manage the Applications process. More features and modules are in the works. “We’re constantly using our clients’ feedback to improve and add to our solutions,” said Rosenfield.