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FAQs for Charity / Not-for-Profit Organizations

PLEASE NOTE: To view or download the Help Manual for Voluntary Sector Organizations in its entirety, click on Downloads - Help Manual on the left side of this page.

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What is BoardMatch Fundamentals?

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How to use the BoardMatch Fundamentals System

Q1: How can we register with BoardMatch Fundamentals?

A:

- The entire registration process including the required BoardMatch Fundamentals Orientation takes 2 hours and can be split into several sessions if you prefer.
- Go to the BoardMatch Fundamentals Website at www.boardmatch.org.
- Click on "Organization Login" on the menu bar at the left side of the screen, then click on "click here" towards the top right corner of the next screen.
- Complete the brief Registration Form by providing your contact information.
- All users from a participating organization must use the same e-mail and password (Organization logins) to access the BoardMatch Fundamentals Website. The system cannot presently handle multiple user e-mails for the same organization

Recommendation: We recommend against using a shared/general delivery email address since e-mails usually contain information about board candidates applying to your agency and are time sensitive. In case your agency only has shared/general delivery e-mail addresses, then please inform the person(s) opening these e-mails to ensure that emails are directed to the designated officer(s) immediately.

- Complete the Registration Detail Form.
- Take the BoardMatch Fundamentals Orientation (In case you have already taken a BoardMatch Fundamentals Live Orientation session, you do not have to take it again online, unless you want to review it. Please send an e-mail to the local BoardMatch Fundamentals office (see Contact Us) indicating the date and location of the session, and we will update your profile).
- After you complete the first registration form, a Release form will be e-mailed to you. Please have

2 of your directors (or the Executive Director and a Board Director) sign, date and fax back to the local BoardMatch Fundamentals office (see Contact Us).

- Post board member requirements in the "Board Positions Posted" section at the lower part of your "Organization Portal." You can also delete any board positions that you fill by clicking on the "X" under "Delete," and if your entire board is full, you can delete all positions by deleting each one individually. By deleting positions, you will ensure that you do not receive applications for positions you have already filled.
- Once you have completed all the steps listed above, you will start receiving applications from candidates. Some agencies start receiving candidates in 1 week whereas others may take 2 months. Since board candidates decide which agencies to apply to, response times can vary greatly. You may also search candidate profiles/resumes and invite them to interview with you, if so inclined.
- If you do not receive any applications from BoardMatch Fundamentals within 2 months, do review your agency's information (as posted on the BoardMatch Fundamentals Website) and see if it can be modified to make it more appealing to professionals from the business community and individuals from the larger community.

The entire registration process takes about 2 hours and can be broken up into [these stages](#):

Q2: How does an organization list more than one Board position?

A:

- For each posting, go to the Section "Board

Positions Posted" toward the bottom of your charity portal (access charity portal by clicking on Charity Login, and enter e-mail and password).

- Click on "to post a new position click here"
- Select the position title and check off the skills required against the position.
- We recommend that you post a different posting for each board position (there is no charge for postings). Please post a separate board position for each position/skill set you require. A single posting with too many skills tends to scare away board candidates since they may think that they are expected to have all the skills you have listed rather than only some of them.

Q3: Where does one find the online orientation on the website?

A: BoardMatch Fundamentals orientation is the third menu item on your charity's portal.

1. Go to the website: [www. boardmatch.org](http://www.boardmatch.org)
2. On the left-hand margin of the home page, click on Organization Login
3. On the Organization Login page, enter your email address & password
4. Click on the button Login
5. This will take you to your organization portal
6. Click on Board Orientation

Q4: Is the on line registration system fully compatible with Macintosh computers?

A: There should be no problem with the Macintosh or any other system as the program is web-based. If problems occur, please report them by email to: technicalsupport@altruvest.org The minimum system requirement is Windows 98 or higher with Internet Explorer 4.0 or higher web browser.

Q5: If I have forgotten my password how do I track it down?

A: Click on Forgot your password? An email will be sent to the local Administrator who will provide you with your correct password.

Q6: Why won't the site accept my email address?

A: In some cases the system does not accept complex email addresses (i.e. long ones with punctuation marks in between words). Call the local BoardMatch Fundamentals office (see Contact Us).

Q7: How I can retrieve a resume that you are sending to our organization?

A: Go to the Website: www.boardmatch.org.

1. On the left blue margin, click on Organization Login
2. Enter the email address of your agency and password
3. On your organization's portal, in the section "Board Positions Posted", click on the number under the column heading "Applicants"
4. This will take you to another page with the candidate's name. Click on the name.
5. This will take you to the profile of the candidate. You can print this page.
6. In order to print the candidate's resume, highlight, cut and paste onto a Word Document, and print.
7. Change the application status, if applicable.
8. Click on "Change Candidate Status".

Q8: How can I search candidate profiles/resumes and invite them for an interview?

A: This functionality is only available after you post at least one board position

- Sign into your Organization Portal.
- Scroll down to the lower part of your portal.
- Click on the symbol under “Search Candidate” (not “Delete/Edit Position” or the “X” symbol) next to the position you want to find a candidate for.
- The next screen allows you to select the skills you are looking for in board candidates.
- In order to review the maximum number of available candidates, we recommend that you not list any special requirements unless they are essential. The more requirements you list, the fewer candidates you will find that meet your requirements. If you do not select any requirements (except the “None” under “Previous Board Experience”), you will see the maximum number of candidates since you will be able to view profiles of all candidates that are seeking board positions.
- Click on the name of the candidate you are interested in for more information about them. We recommend that you select your preferred skills when you first search for candidates, and if you do not find enough candidates, you broaden your search by restarting this step, and selecting fewer, or secondary skills until you find a sufficient number of appropriate candidates to invite to meet with your organization.
- A sample search of all candidates reveals a certain number of matches.
- After reviewing the candidates’ qualifications shown on the screen, you can click on the invite them to interview with your organization.
- You can also press the “PgDn” (Page Down) key on your keyboard to view more candidates.
- You can now review the candidate's credentials, scroll down to the bottom of the screen by clicking the space to the right of your browser and invite

the candidate to interview with you by clicking on the button as shown. If you are not interested in the candidate, you can click the "Back" button or arrow on the top of your browser and return to the screen listing the candidates that had met your search criteria and can continue looking for additional candidates.

Q9: When updating my organization's entry how can I add skills that are not part of the checklist?

A: You may add skills in the Box called "Other" and in the Box called "List a Requirement".

- We recommend that you not list any special requirements unless they are essential. When candidates see special requirements listed that they do not meet, they will not apply for that position.

Q10: Is there a print option available for the online learning?

A: Yes, but it can only be printed one page at a time. Click on "Ctrl" and "P" at the same time, or click on "File," then "Print" on your browser (Internet Explorer, Netscape, AOL, etc.)

Q11: Why can't I see changes made on our organization's portal?

A: Click on submit. If the changes cannot be viewed at this point, log out of the website and log in again.

Q12: How do I add, edit, or delete board positions?

A: To Add a position:

1. On the Organization portal under the section "Board Positions Posted", click on the Add New Board Position (not the "X" symbol).

2. Go to the drop down list of Board Positions and choose accordingly.
3. Tick off the skills required for that position.
4. Click Submit

We recommend that you post a different posting for each board position. Please post a separate board position for each position/skill set you require. A single posting with too many skills tends to scare away board candidates since they may think that they are expected to have all the skills you have listed rather than only some of them.

To Edit a position:

1. On the Organization portal under the section "Board Positions Posted", click on the Edit button next to the Board position.
2. Go to the drop down list of Board Positions and choose accordingly.
3. Tick off the skills required for that position.
4. Click Submit

To Delete a board position:

- If you fill a position with a candidate that was sent to you by BoardMatch Fundamentals, we ask that instead of deleting the position, you inform BoardMatch Fundamentals by changing the candidate's status to "Offer Extended"
- In case you have been independently informed by the candidate that he/she has accepted your offer, i.e. verbally or by email, please inform BoardMatch Fundamentals. BoardMatch Fundamentals will update the status accordingly. Note that you cannot change the candidate's status to "accept." This option is only available to the candidate and BoardMatch Fundamentals.
- If special circumstances warrant that the candidate not be offered the position until formal nomination

at your agency's AGM at a later date, click on "offer extended" and add a note indicating this in the "Custom Message" Section. Inform BoardMatch Fundamentals by separate email as well since the system will not automatically notify us.

- If you fill a position with a candidate that was not referred to you by BoardMatch Fundamentals, you should delete the position by taking the following actions:
- You should record a candidate's name and contact information before you delete a position, since you cannot review it after you have deleted it. It will be removed from your Organization Portal.
- Sign into your Organization Portal.
- Click on the Delete button next to the Board position. The system will provide a prompt "Are you sure you want to remove this Position?" Click on Yes or No.

Q13: How will a candidate know that his/her application has been forwarded by the system to the charitable organization?

A: The system will inform the candidate that his/her application has been successfully submitted to the agency. On the candidate's portal, the status will indicate "Applied" against the name of your agency.

Q14: What do we do if a candidate does not respond to our emails and phone calls?

A: If a candidate does not respond to your e-mails, please call him at least twice. If you still do not receive a response from him, he is probably no longer interested in being on the board of your organization. This may happen if you have taken longer than 2 weeks to respond to their application, or occasionally, a candidate will change their mind after applying, and may become unresponsive. In both cases, they should ideally have

withdrawn their application to your organization. In case they have not withdrawn their application, you have every right to decline the candidate. Click on “Decline,” complete the form, and click “Submit”.

Q15: What do we do if we do not wish to receive any more applications while we review the current applications?

A: Suspend a board posting temporarily when you have received a number of candidate applications. This allows you the opportunity to focus on the current applications before considering more. You will still be able to view and track the current applications.

1. Sign into your Organization Portal
2. Scroll down to the lower part of your portal
3. Click on the symbol under “Delete/Edit Position” (not the “X” symbol) next to the position you want to edit
4. Click on the box at the bottom of the screen to temporarily suspend the position

Q16: How do I go about updating the information about our charitable organization on the site?

A:

1. Login with your email address and password.
2. On your portal, go through each of the 2 choices, e.g. registration, registration detail. Click on the “Edit” symbol next to the name of the form you want to edit.
3. Click on each item you want to change, and then do not forget to click on “Submit” at the end of each item. It takes a few minutes for the system to accept the change. If you do not see the change immediately after clicking on Submit, click on the “Refresh” button on your browser, or simply log out of the site and log in again. After viewing the

change, closing out the window by clicking on the “X” at the top right hand corner of your window will log you out of your “Organization Portal.” If you want to return to your portal instead of closing it, click on “Go Back” at the bottom of the form you are viewing, or the “Back” button or arrow on your browser’s toolbar (usually towards the top of your monitor).

Q17: How do we indicate that a candidate has voluntarily withdrawn his/her application?

A: You can go to your organization’s portal and change the candidate’s status to “Decline,” by selecting the “Decline 3” message. Please be sure to inform the local BoardMatch Fundamentals office by e-mail or phone (see Contact Us) of the candidate’s decision so that we can follow up with him/her. The system does not automatically copy us on the message you choose to send the candidate.

Q18: How can we indicate that we have offered a candidate a committee position instead of a board position?

A: BoardMatch Fundamentals candidates are oriented to the roles, responsibilities, duties and liabilities of a board member, and through the matching process, come to expect that any offer will be at a board level. As an organization we are primarily mandated to place candidates on boards of directors versus board committees or as program volunteers. However, if you would like to offer a candidate a committee position, please follow the standard “OFFER EXTENDED” process AND clearly reference the committee position in the message box.

Q19: I am attempting to complete the Final Quiz for the BoardMatch Fundamentals orientation but get an internal system error when I submit my

responses. How do I complete the orientation?

A: The BoardMatch Fundamentals Orientation does not seem to work efficiently with certain browsers. Currently only Internet Explorer 4.0 or higher version is supported by the system. E-mail or phone: the local BoardMatch Fundamentals office (see Contact Us) with the type of browser, resolution size and the modem used and where the error appeared (during the quiz at the beginning or end of the orientation).

Q20: What should we do if we get a Server error?

A: Try again in an hour, or the next day. If the problem recurs then, please report the error to BoardMatch Fundamentals by going to Contact Us.

Q21: Who can I turn to for support if I have questions about the BoardMatch Fundamentals Service?

A:

- If you have any questions, we recommend you look through this list of Frequently Asked Questions (FAQs).
- If you cannot find answers to your questions in the list of FAQs, then please access our BoardMatch Fundamentals Help Manual for Voluntary Sector Organizations .Failing that, please feel free to contact the local BoardMatch Fundamentals office (see Contact Us).

What is BoardMatch Fundamentals?

Q1: What is BoardMatch Fundamentals?

A:

- BoardMatch Fundamentals is a service available

to registered charities in the Greater Toronto Area. The service is available to both charities and not-for-profit organizations in Calgary, Fredericton, Greater Vancouver, and Thunder Bay. It links charitable organizations with highly motivated and informed volunteers from diverse backgrounds who are willing to serve in a governance role on their boards of directors.

- Recruiting activities target community-minded individuals with backgrounds in finance and accounting, law, human resources, marketing, operational management, sales, etc.
 - We have placed more than 1300 volunteers on the boards of more than 400 charitable organizations in the Greater Toronto Area and Greater Vancouver over the last 5-1/2 years
 - BoardMatch Fundamentals is a program of Altruvest Charitable Services, a registered charity based in Mississauga, Ontario.
 - The program is funded by foundations (e.g., The Counseling Foundation of Canada, The J.W. McConnell Family Foundation, RBC Foundation, Imperial Oil Foundation), Canadian Heritage, private corporations (e.g. Bell Canada, Maritz), and supported by the United Way of Canada and local Volunteer Centres. For a complete list of our Altruvest supporters please click on "Donors & Sponsors" on the menu bar. Altruvest is pleased to be collaborating with Volunteer Calgary, Volunteer Thunder Bay and Volunteer Vancouver to bring BoardMatch Fundamentals to their respective cities.
1. Further information can be found on our Website at www.boardmatch.org via "Program Overview" link.

Q2: Who qualifies for BoardMatch Fundamentals?

A:

- Registered charities in the Greater Toronto Area. Both charities and not-for-profit organizations in Calgary, Fredericton, Greater Vancouver, and Thunder Bay.
- Currently located in Calgary, Fredericton, Greater Toronto Area, Greater Vancouver, and Thunder Bay.
- Expansion plans for other national partners are underway.

Q3: What orientation does BoardMatch Fundamentals provide to community agencies?

A:

- BoardMatch Fundamentals helps agencies to improve their process of recruiting, motivating and retaining quality board members.
- Specific information provided includes the following:
 - Duties and responsibilities of board members
 - Liabilities of board members
 - Checklist for board recruitment
 - Ethical fundraising
 - How to motivate your board
 - Developing a board manual
 - Sample job descriptions for board members
 - Sample board member contracts
 - Board report card
 - Board attendance policy
 - Board member reference checklist
- Community agencies can take the free 90 minute BoardMatch Fundamentals Orientation over the Internet - www.boardmatch.org , click on "Organization Login" on the toolbar at the left side of the screen, enter your Username/e-mail and

Password or complete the brief registration form for new registrants, and then click on "Board Orientation." Limited Live Orientation Sessions will be available

Q4: What orientation does BoardMatch Fundamentals provide to Board Member candidates?

A:

- Board member candidates take a free 90-minute orientation over the Internet where they learn about the roles, responsibilities, duties and liabilities of board members. Limited Live Orientation Sessions are available.
- Specific information provided includes the following:
 - Size, scope and funding of the voluntary sector.
 - Roles and responsibilities of board members including strategic planning, stewardship, fundraising, human resources, community relations and accountability.
 - Duties and liabilities of board members.
 - Guidelines for being an effective board member - demonstrating commitment to the organization and due diligence in carrying out duties.
- A guest speaker from a participating organization also provides the agencies' perspective.

Q5: What expectations do candidates have?

A:

- Time commitment depends on the organization, typically 5 to 12 hours a month. Agencies must be absolutely clear about this expectation of their board members.
- Term of service varies from two to four years,

again dependent on the organization.

- Dedication to the work of the agency and its vision for the future is necessary.
- Willingness to contribute their expertise and to work in different areas of agency governance, including cultivating contacts and fundraising.
- Tolerance of differing views-a sense of humour helps!

Q6: What qualifications do board member candidates possess?

A: Board candidates should possess the following:

- Post-secondary degree or diploma with at least 2-3 years of experience preferred(or equivalent post-graduate education) in the following fields: accounting, engineering, finance, human resources, information technology, law, marketing, sales, operations management, public relations, etc.
- Leadership and critical thinking skills.
- Ability to work effectively as part of a team.
- Previous volunteer experience is a plus but not required.

Q7: Why should we recruit board members through BoardMatch Fundamentals?

A:

- Improve governance, accountability and capacity by bringing in motivated volunteers with business and/or community experience.
- Create diversity of skills on your board by including members with expertise in accounting, engineering, finance, human resources, information technology, law, marketing, sales, operations management, public relations, etc.
- Expand resource development networks through

another source of connections.

- Reflect the broader community that you serve by creating diversity of backgrounds on your board.

Q8: Which other agencies participate in BoardMatch Fundamentals?

A:

- Charitable organizations of all sizes and missions participate in BoardMatch Fundamentals.
- Services, member agencies provide include Addiction/Drug Education, Arts/Culture, Children, Community Development, Community Law and Advocacy, Disabled, Employment Training, Environment, Health, HIV/AIDS, Homelessness, Humane/Animal Welfare, Hunger, Immigrants/Refugees, International Aid, Literacy, Mental Health, Poverty, Seniors, Women, and Youth.
- Participating organizations include Big Brothers and Sisters, Boys & Girls Clubs, Canadian Cancer Society, Distress Centres, United Ways, and local Volunteer Centres. A complete list is available on our Website: www.boardmatch.org, and click on "Participating Organizations" on the toolbar at the left side of the screen.