Board Magic

Your board access, one click away.

CONCEPT OVERVIEW
For executive review

The problem

Board members are busy volunteers. Getting them materials usually means emailed attachments, or asking them to sign in to a tool like SharePoint or Dropbox they never chose. The result is lost emails, forgotten passwords, version confusion, and staff time spent on tech support instead of board engagement. Traditional board portals fix some of this, but typically cost thousands of dollars a year.

The idea

A purpose-built board portal where a director enters their email, opens a secure one-time "magic link" from their inbox, confirms their email address, and is in. No passwords to create, remember, or reset. They land on a staff-edited homepage and reach every board document in a couple of clicks.

What directors get

- Passwordless sign-in from their inbox
- A homepage with the next meeting, announcements, and a note from the chair
- One library of packets, minutes, and financials, always current
- Clear rules per document: download or view-only

What staff get

- A homepage they edit themselves, like writing an email
- Simple publishing: upload, tag to a meeting, set download rules
- One roster that controls access; end a term with one click
- A record of who opened what, and when

How access stays controlled

On the roster: the director gets a link right away. **Not on the roster:** the request goes to a designated administrator to approve or deny. Magic links expire after 15 minutes if unused, and immediately once used. Every decision is logged, and removing a person from the roster ends access immediately. Downloads can be watermarked with the reader's name so any shared copy is traceable.

Why it could stand out

Passwordless access alone is no longer unique; some board portals already offer magic links. The combination we are aiming for is what is different: an editable homepage, roster-driven approvals, per-document download rules, and a long-term goal of syncing the board list directly from **Salesforce**, where many nonprofits already keep it. Update the list there, and access here stays accurate with no second list to maintain.

Where it could go

Pilot	Magic link sign-in, roster, document library, editable homepage, view logging. Built on a low-cost cloud platform with sample data only.
Next	Download watermarking, access-request approvals, stronger admin sign-in, audit reporting.
Later	Salesforce roster sync, then a lightweight board governance platform: give and get tracking, meeting attendance, and governed board communication.

Does this match the pain you or your board feel today? Would you pilot it with one board or committee, and who would own the roster and approve access requests?

Board Magic is a working name; trademarks are pending. Pilot will use sample data only.