



THINKING BOARD EVALUATOR

POWERED BY INDEPENDENT AUDIT

THINKING BOARD EVALUATOR START UP GUIDE

Welcome to Thinking Board Evaluator from Independent Audit. We thank you for trusting us with your board evaluation. At Independent Audit, we are on a mission to raise universal standards in the way that boards operate and as a result make a difference to the directors, staff and communities impacted by their organisations. We want to make sure any board can access to tools to conduct effective, impactful board evaluations that will help take its performance to the next level.

In this guide, you will find all the information you will need to prepare to start your board evaluation using Thinking Board Evaluator's simple and secure platform.

1

Setting Up Your Board In Thinking Board Evaluator

First, we'll help you set your board members in Thinking Board Evaluator. Simply add your members' information, company information and review timings into the Evaluation Setup form we have provided. You can submit the form by email to support@thinkingboardevaluator.com or upload it via our online form [here](#). The Thinking Board Evaluator support team will set up your board within 48 hours.

2

Preparing Your Board Members

On the Review Start Date you specified on the set up form, Thinking Board Evaluator will automatically. Send invitation emails to each of your board members with instructions on how to log in to the platform and to complete the questionnaire.

Before that step, you will want to prepare your board members with key details and deadlines for the evaluation. You can access an email template [here](#) that you can edit to use with your board.

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IT Housekeeping

To help prevent our system emails from triggering spam filters or being quarantined, please ask your IT Department to *whitelist* both our email addresses and our website:

Support email address: support@thinkingboardevaluator.com

System email address: thinkingboard.support@ipitsi.com

Website: thinkingboard.ipitsi.com

If participants have non-company emails it can help if they add our email address to their contacts or 'safe senders', list.



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Opening the Questionnaire for responses

Your board evaluation questionnaire will be opened for responses on the date you specify. Thinking Board Evaluator will send each of the participants an email containing brief instructions and a link to their questionnaire. We will send you a confirmation email to let you know that the emails have been successfully sent and that your evaluation is open. You may also wish to send a notification to your board members in a separate email to remind them to look for the Thinking Board email. You can access an email template [here](#) that you can edit to use with your board.

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Log In To Your Account:

When your evaluation goes "live" you will receive access to your administrator account via email. You will receive a message containing a link from thinkingboard.support@ipitsi.com, and once you have set up your password, you will be able to monitor the progress of your review and when it is complete, access your reports.

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Managing Your Board Evaluation

During the evaluation period, you can view board member progress, send reminder emails, and re-send invitation emails. If you need to extend the deadline for completing your evaluation, please contact the support team at thinkingboard.support@ipitsi.com.

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Closing Your Evaluation

Once all of your board members have completed the Thinking Board Evaluator questionnaire, you can close the evaluation by:

- a. Returning to the STATUS page using the left-hand navigation
- b. Then clicking the name of your evaluation
- c. Then click STOP REVIEW at the top of the page

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Generating Your Board Evaluation Report

Now you are ready to generate and share your Board Evaluation Report. To do this, click REPORTS in the left-hand navigation. On the next screen, you will see a list of your questionnaires.

Click VIEW REPORTS to see your report. Thinking Board Evaluator has a range of reports available. We recommend that you watch the short video on the portal home page to better understand how to use the report.

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Thank The Board & Prepare For Review

At this stage, you are ready to prepare for the board to meet and review the evaluation. We recommend sending an email to your board members at this stage to thank them for their participation and to inform them of next steps.

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Review With Your Board

The Thinking Board Evaluator reports will enable a focused, thorough evaluation with your chairman and board preparing you to take next steps.

Have Questions?

We're here to help.

Contact Us at:

Support@thinkingboardevaluator.com

