



Shared Documents & Meeting Minutes for a Board

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Tech Made Simple. Service Made Personal.

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What's Inside

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THE 60-SECOND VERSION

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1. The Whole Idea on One Page If you read only one page, read this. Here is the whole plan as a short checklist. A shared drive gives your board one place for its documents — minutes, bylaws, policies, treasurer's reports — where every officer can find the latest version. No more hunting through email for the attachment someone sent last spring, and no more wondering which copy is the real one.

- 1 Pick one home for the board's files — a free Google Drive is the common choice.
- 2 Make it belong to the board, in a group account, not a single officer's.
- 3 Build a few plain folders: Minutes, Finances, Policies, Agendas.
- 4 Keep minutes in one simple template so every set looks the same.
- 5 Give 'edit' to a few officers and 'view' to the wider board.
- 6 Agree who files what, so nothing lands in the wrong place or goes missing. GOOD TO KNOW This costs nothing for most boards. A free account gives you plenty of room for years of minutes and documents, reachable from any phone or computer, and backed up automatically off-site. The rest of this guide walks through setting it up, a minutes routine, who should see what, and keeping it safe through leadership changes. Take it a page at a time; the first setup is an afternoon's work. WHY ONE PLACE 2. Why Email

Attachments Always Fail a Board Most boards keep their documents in email, and it works just well enough to never get fixed. The trouble is that email scatters everything: the minutes are in one person's inbox, the budget in another's, and nobody can be sure they have the current version. When an officer leaves, their inbox — and the board's history — goes with them. A shared drive replaces all of that with one place everyone looks. The latest minutes are where the minutes always are. The bylaws are one click away. And because it belongs to the board, the whole record stays put no matter who comes and goes. One place to look, so no one hunts through old emails for a document. One current version of each file, not five slightly different copies.

TIP

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The record stays with the board when officers change.

It's reachable from any device, by whoever needs it. If your board has ever argued about which version of the minutes or the budget is correct, a shared drive ends that argument for good. There is only ever one current copy, in one place. WHAT IT IS 3. What a Shared Drive Really Is A shared drive is simply a set of folders that lives online instead of on one person's computer. You open it in a web browser or a phone app, and inside are folders and files just like on any computer — except that the right people can all reach the same ones, from anywhere. Because the files live online, they are safe from a spilled coffee or a dead laptop, and they are backed up without anyone thinking about it. And because access is shared, two officers can look at the same budget at once, each on their own screen. Folders and files that live online, reachable from any device. The right people all see the same documents, from wherever they are. Safe from a lost or broken computer, and backed up automatically. Opened in a web browser or a simple phone app. GOOD TO KNOW If you have ever used folders on a computer, you already understand a shared drive. The only new idea is that the folders live online and the board shares them. That is the whole concept. Everything else in this guide is about setting it up tidily and sharing it wisely so it serves the board for years. THE CHOICES 4. Which Shared Drive to Use There are a few good shared drives, and the best one is usually whatever your board already leans toward. For most volunteer boards, a free Google Drive is the easiest, because it is free, roomy, and works on every device. Other options suit groups already paying for other tools.

GOOD TO KNOW

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Google Drive: free, generous space, works everywhere — the common choice.

Microsoft OneDrive or SharePoint: natural if your group pays for Microsoft 365. Dropbox: simple and well-liked, with a free tier that is tighter on space. Your church or club software's document area, if it has one. This guide uses Google Drive as the example, since its free plan fits a volunteer board so comfortably. The ideas — folders, templates, sharing — carry over to any of them. If your group already pays for Microsoft 365 or has nonprofit Google Workspace, use that, since it's already part of your world. Otherwise, a free Google Drive is the gentlest place to start. THE GROUP ACCOUNT 5. Make the Drive Belong to the Board Here is the decision boards most often get wrong, and it matters more here than almost anywhere. If the drive lives in the secretary's personal account, then when the secretary leaves, the board's entire history can leave too. Build it in an account that belongs to the board itself. Create one free account in the board's name, not a person's. Build the shared drive and all its folders inside that account. Keep its password where two or more officers can reach it. Hand the account to the next secretary when roles change. WATCH OUT A board's records trapped in one officer's personal account can vanish the day that officer moves away or falls out with the group. Spend the ten extra minutes to make a group account first. It is the board's memory you are protecting. Done this way, the drive becomes part of the board's permanent furniture — its memory, passed intact from one secretary to the next.

FOLDERS**6. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

6. A Simple Folder Layout A tidy drive starts with a few plain folders, named so that anyone — including next year's officers — knows instantly where things go. Resist the urge to build an elaborate filing system; a handful of clear folders beats a maze of clever ones nobody can navigate. Minutes — every meeting's approved minutes, by year. Finances — budgets, treasurer's reports, and statements. Policies & Bylaws — the governing documents and standing rules. Agendas & Packets — what goes out before each meeting. Admin — the roster, contacts, and anything else that doesn't fit above. TIP Name folders the way a brand-new officer would look for things, not the way the last secretary happened to think. Plain beats clever every time a stranger has to find a file. Five or six clear folders will hold a board's whole life comfortably. You can add a sub-folder by year inside Minutes and Finances as those fill, and otherwise leave the structure simple. NAMING FILES 7. A Naming Style That Stays Findable Within the folders, a consistent way of naming files makes everything easy to find and sorts them neatly in order. The trick most boards find helpful is to start each file name with the date in year-month-day form, because that makes the computer line them up chronologically on its own. Start with the date as 2026-10-31 so files sort in order by themselves. Then say plainly what it is: '2026-10-31 Board Minutes.' Be consistent, so the same kind of file always looks the same. Avoid vague names like 'final' or 'new' that mean nothing in a year. GOOD TO KNOW Putting the date first, in year-month-day order, is a small habit that pays off forever: your files sort themselves into perfect chronological order with no effort from you. Agree on this style once, write it on the cheat sheet, and every officer who files a document keeps the drive tidy without thinking about it.

THE MINUTES

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8. A Simple Minutes Template Minutes are the heart of a board's records, and they are far easier to write and read when every set follows the same shape. A simple template means the secretary never faces a blank page, and anyone reading old minutes always knows where to look for a particular decision. A heading: the group's name, the date, and where the meeting was held. Who was present, who was absent, and who chaired. Each agenda item, with the discussion kept brief and the decision clear. Motions, who made and seconded them, and the vote's result. Action items: who will do what, by when. The time the meeting closed and the date of the next one. TIP Make one blank template document and keep a copy of it in the Minutes folder. The secretary starts each meeting by making a copy and filling it in — no blank page, no forgotten section. Good minutes are brief, clear, and consistent. A template delivers all three, and it turns minute-taking from a dreaded chore into a matter of filling in familiar blanks. TAKING MINUTES 9. The Minutes Routine, Start to Finish Minutes flow smoothly when they follow a simple routine from meeting to filing. The aim is to capture decisions while they are fresh, get them approved at the next meeting, and file the approved version where it belongs — all without heroics.

- 1 Before the meeting, copy the template and fill in the heading and agenda.
- 2 During the meeting, note decisions, motions, votes, and action items.
- 3 Soon after, tidy the notes into clear minutes and save them as a draft.
- 4 Send the draft to the board to read before the next meeting.
- 5 At the next meeting, approve the minutes, then save the approved version.

GOOD TO KNOW

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Minutes record what was decided, not every word that was said. Keep discussion summaries short and decisions clear, and both the writing and the reading get far easier. This routine, kept faithfully, means the board always has an accurate, approved record, filed where everyone can find it. It is the backbone of a well-run board. DRAFT VS APPROVED 10. Keeping Draft and Approved Minutes Clear It matters that everyone can tell a draft set of minutes from the official, approved version, because only the approved minutes are the true record. A simple labeling habit keeps the two from ever being confused. Mark drafts plainly as 'DRAFT' in the file name until approved. Once approved, save a clean version and remove the draft label. Keep approved minutes in the Minutes folder; drafts can live in a sub-folder. Never edit approved minutes — if a correction is needed, the board approves it. WATCH OUT Approved minutes are the official record and should not be quietly changed afterward. If an error is found, note the correction in the next meeting's minutes rather than rewriting the old ones. A clear line between draft and approved protects the board. Everyone knows which document is the real record, and the history stays trustworthy. EDIT VS VIEW 11. Who Can Change Things, and Who Can Only Look Sharing a drive well means being clear about two kinds of access. A few officers need to add and change files. Most board members only need to read them. Keeping that line clear prevents accidental edits and keeps the record tidy. Give 'edit' only to the officers who actually file documents — often the secretary and chair. Give 'view' to the wider board, so they can read but not alter. Share by each person's email so access is personal, not a loose link. You can change or remove anyone's access later in a few clicks.

WATCH OUT**9. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Resist giving everyone edit rights. A drive with a dozen editors soon has files moved, renamed, and accidentally deleted. A small circle of editors keeps the record safe. Match access to the role: editors for the few who maintain the records, viewers for everyone else. That simple discipline keeps a shared drive trustworthy for the long haul. **SHARE LINKS CAREFULLY** 12. The Danger of 'Anyone With the Link' Shared drives offer a quick way to share a file with 'anyone who has the link.' It is convenient, but for a board's records it is usually a mistake, because that link can be forwarded to anyone, and board documents often hold things that should not travel freely. Prefer sharing with named people by email over 'anyone with the link.' A link can be forwarded, so treat it as public once it leaves your hands. Never put a treasurer's report or a member roster behind an open link. If you must use a link, set it to 'view' only and share it narrowly. **WATCH OUT** An 'anyone with the link' share is one forward away from being public. For anything with members' details or the board's finances, share with named people only. Named sharing takes a few seconds longer and keeps the board's records where they belong. Save the open links for truly public documents, if any. **VERSION HISTORY** 13. The Safety Net of Version History One of the quiet comforts of a shared drive is that it remembers earlier versions of a document. If someone changes the wrong thing or deletes a paragraph by mistake, you can look back at how the file was before and restore it. This takes the fear out of editing. The drive keeps older versions of a document automatically. You can view what a file looked like earlier and restore it if needed. A deleted file usually waits in a trash for a while before it's gone. Knowing this, no one needs to fear making an edit.

GOOD TO KNOW

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Because earlier versions are kept and deleted files linger in the trash, almost any mistake is recoverable if caught reasonably soon. A shared drive is far more forgiving than a single computer. Version history is a gentle insurance policy running in the background. It means officers can work confidently, knowing a slip is almost always a quick fix rather than a disaster.

THE AGENDA PACKET 14. Building the Meeting Packet Boards run better when members get the agenda and supporting documents before the meeting, not during it. A shared drive makes assembling this 'packet' easy: gather the agenda, the last minutes, and the treasurer's report into one folder, and share the link with the board a few days ahead. Make an Agendas & Packets folder, with a sub-folder per meeting date. Drop in the agenda, the draft minutes to approve, and the finance report. Share the folder with the board a few days before the meeting. Members arrive having read it, so the meeting moves faster. **TIP** A board that reads the packet beforehand spends the meeting deciding, not catching up. The shared drive makes sending the packet a two-minute job instead of a pile of email attachments. The packet habit, supported by the drive, is one of the simplest ways to make board meetings shorter and more productive. Everyone comes prepared, and the record is already half-filed.

THE BYLAWS 15. Keeping Bylaws and Policies Findable Every board has governing documents — bylaws, standing rules, policies — that come up at awkward moments, usually when no one can find them. Keeping them in a clearly named Policies folder means the answer to 'what do our bylaws say?' is always a few seconds away. Keep the current bylaws and policies in one clearly named folder.

GOOD TO KNOW

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Name each file plainly, with the date it was last amended.

Keep prior versions in an 'old' sub-folder, so history is preserved. Point new officers to this folder as part of their welcome. When a dispute arises about procedure, a board that can pull up its current bylaws in seconds settles things calmly. One that can't spends the meeting guessing. The drive makes the difference. Governing documents are the board's rulebook. Keeping them current, dated, and easy to find is a small habit that spares a great deal of confusion down the road. THE TREASURER 16. Treasurer's Reports and Financial Files Financial records deserve a tidy home and a little extra care about who can see them. A Finances folder keeps budgets, reports, and statements together, while thoughtful sharing makes sure sensitive numbers reach only the officers who should have them. Keep budgets, treasurer's reports, and statements in the Finances folder. Share financial files with the officers who need them, not the whole world. Keep a monthly report filed so the board always sees current numbers. Save prior years for history and for anyone who audits the books. WATCH OUT Financial documents can include bank details and member payment information. Keep them shared with named officers only, never behind an open link, and never in a public folder. A well-kept Finances folder makes the treasurer's job easier and the board's oversight clearer. Companion guides on receipts and bookkeeping go deeper if your treasurer wants them.

THE ROSTER

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17. The Member Roster and Privacy A board often keeps a roster of members with contact details, and this is among the most sensitive files it holds. People trust the group with their information, so the roster deserves careful handling: shared narrowly, never public, and never attached to an open link. Keep the roster in the Admin folder, shared only with officers who need it. Never place member contact details behind an 'anyone with the link' share. Collect only the details the board actually needs. Honor any member's wish to keep their information more private. WATCH OUT A leaked member roster is a real breach of trust and can expose people to unwanted contact or scams. Treat it like a church directory: shared with care, never left open. Handled respectfully, a shared roster helps the board serve its members. Companion guides on directories and privacy go further; the key here is to share it narrowly and never openly. SCANNING PAPER 18. Bringing Old Paper Records In Most boards have a box of paper — old minutes, signed documents, historical records — that would be safer and more useful in the shared drive. You do not need a fancy scanner; a phone can photograph or scan documents into tidy files you can file alongside the rest. Use a phone's scanning feature to turn paper pages into clear files. Name and file each one just like a digital document. Start with the most important: founding documents, signed agreements, past minutes. Keep the original paper too, in a safe place, for anything legally important. TIP A phone makes a surprisingly good scanner. Lay the page on a plain surface in good light, let the phone find the edges, and you have a clean file in seconds. Digitizing the old paper box protects the board's history from fire, damp, and loss, and makes decades of records searchable. Do it a handful of pages at a time and the box slowly becomes a safe, searchable archive.

SEARCHING

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19. Finding Anything in Seconds One of the real joys of a shared drive is that you can search it. Instead of flipping through folders, you type a word — a member's name, a motion, a date — and the drive finds every document that mentions it. For a board with years of records, this is a small miracle. Type a word or phrase into the drive's search box to find matching files. Search works on the text inside documents, not just the file names. This makes years of minutes instantly searchable for a past decision. Good file names make search results even easier to recognize. GOOD TO KNOW Being able to search every past set of minutes for 'when did we vote on the roof?' turns the board's archive from a dusty box into a living, answerable memory. Search is why a digital archive beats a filing cabinet. The more faithfully you file documents, the more powerfully search rewards you later. ON PHONES 20. Reaching the Drive From a Phone Officers do not always sit at a computer, so it helps that the drive works on a phone too. With a simple app, a board member can pull up the minutes or the bylaws from a meeting, a parking lot, or their kitchen table. Install the drive's app on officers' phones and sign in to the group account or their own access. The same folders and files appear, ready to read anywhere. Handy for checking a document mid-meeting or on the go. Editing is possible on a phone, though tidier on a computer. TIP Encourage officers to put the drive app on their phones. Being able to pull up the bylaws or last month's minutes on the spot settles a lot of meeting questions instantly. Phone access makes the drive genuinely convenient. The board's records ride along in everyone's pocket, ready whenever a question comes up.

RETENTION**14. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

21. How Long to Keep Things A board should keep its records for a good while — some documents indefinitely — and a shared drive makes that painless, since space is rarely a worry. The main thing is to keep the permanent records safe and to know, roughly, what must be kept and for how long. Keep minutes, bylaws, and founding documents permanently. Keep financial records for the number of years your group or state requires. Archive old years into clearly labeled folders rather than deleting them. When in doubt about legal retention, ask your accountant or attorney. **GOOD TO KNOW** Because a shared drive has room to spare, the simplest safe rule for a small board is: keep the important records, archive the rest by year, and delete almost nothing. Storage is cheap; lost history is not. This guide can't be legal advice on retention, but the drive makes keeping records easy. When a specific rule matters, confirm it with a professional and let the drive hold everything safely in the meantime. **CONFIDENTIAL**

22. Open Records and Confidential Ones Not every board document is for every eye. Some — approved minutes, public policies — may be shared widely or even posted. Others — personnel matters, legal advice, sensitive finances — belong only to a few. A little thought about which is which keeps the board both open and discreet. Keep clearly confidential items in a restricted folder shared with few. General records can be shared more widely with the board or members. Label confidential files so no one shares them by accident. When unsure, treat a document as confidential until the board decides otherwise. **WATCH OUT** Personnel discussions, legal matters, and anything about a specific person's situation should stay in a tightly restricted folder. Sharing them, even by accident, can cause real harm and hard feelings.

OFFICER CHANGES**15. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Sorting documents into open and confidential, and sharing each accordingly, lets a board be transparent where it should be and careful where it must be. The drive makes both easy to honor. 23. Handing Over to New Officers Boards turn over, and the handoff is where a shared drive truly proves its worth. Instead of a departing secretary trying to forward years of email, the new officer simply gets the keys to the drive and finds everything already in place, tidy and complete.

- 1 Give incoming officers access to the folders their role needs.
- 2 Pass the group account to the new secretary, with a short walkthrough.
- 3 Remove departing officers' edit access once the handover is done.
- 4 Point new officers to the bylaws and recent minutes as a starting read. **GOOD TO KNOW** A good shared drive makes a handover a calm half-hour instead of a frantic scramble. The new officer inherits the whole organized record, not a mystery. This smooth handoff is the real payoff of keeping records in one group-owned place. Leadership changes stop threatening the board's memory and become simply a matter of passing the keys. **KEEP THE KEYS** 24. Guarding the Account and Password The group account is the key to the whole archive, so guard it as carefully as the record it holds. If the password is lost or known only to someone long gone, the board could lose access to its own history. A little care here prevents a real crisis. Keep the account password where two or more officers can reach it. Record the recovery email and phone so the account can be rescued. Don't let the password live only in one person's head. Review who holds it once a year and update when someone leaves. **TIP** A sealed note in the board's physical records, or a password tool the officers control, both work. The point is that the board, not one person, always holds the key to its own archive.

A BACKUP**16. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

Guard the account and you guard everything in it. This is the one piece of housekeeping that keeps a board's records truly safe for the long term. 25. Keeping an Extra Copy A shared drive is already backed up off-site by the provider, which is a comfort. For true peace of mind, a board may also keep its own occasional copy of the most important records, so the archive can never be lost to a forgotten password or a rare mishap.

- 1 Once or twice a year, download the key folders — Minutes, Bylaws, Finances.
- 2 Save that copy somewhere safe, such as the treasurer's records.
- 3 Keep the account password recorded so access itself is never lost.
- 4 Treat the backup as insurance you hope never to need. **GOOD TO KNOW** The drive's own off-site backup handles the everyday risks. A yearly download of the key folders is simply belt-and-suspenders for a board's irreplaceable records. A few minutes once or twice a year means the board's history can survive almost anything. Like all good insurance, its value is in the one unlucky day it saves you. **PAPER TOO** 26. Serving Officers Who Prefer Paper Not every officer is comfortable online, and a shared drive should never leave them behind. Happily, the drive makes serving them easier: because every document is in one accurate place, printing a clean packet or a set of minutes for someone is quick and always current. Print the packet or minutes for any officer who prefers paper. Because the drive holds the current version, the printout is always right. Offer to help a reluctant officer open the drive, when they're ready. Keep signed paper originals where legally needed, filed safely. **GOOD TO KNOW** The shared drive doesn't replace paper for those who want it — it makes the paper better, because every printout comes from one accurate, up-to-date source.

COMMON MISTAKES**17. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

The goal is one set of records serving everyone, on screen or on paper, however each officer prefers. No one is left guessing, and no one is forced online against their comfort.

27. The Mistakes That Undo a Shared Drive Most board drives that fall apart do so for a few avoidable reasons. Knowing them in advance keeps yours tidy and trustworthy for years. Building it in one officer's personal account, so it's lost when they leave. Giving everyone edit rights, so files get moved, renamed, and deleted. Using 'anyone with the link' for sensitive finances or the roster. No naming habit, so the drive becomes a jumble no one can search. Editing approved minutes after the fact, muddying the official record. TIP Run a simple test: could a brand-new secretary open the drive and find last year's minutes, the current bylaws, and the latest budget in under a minute? If yes, you're doing it right. Avoid these five and the rest is smooth. A good board drive is group-owned, tidily named, shared with care, and kept honest about what's approved. TROUBLESHOOTING 28. When Someone Can't Get In If an officer can't open a file or reach the drive, the cause is almost always a small sharing matter, not a broken system. A quick check usually sets it right. Confirm the person is signed in with the email you shared the file to. Check that they were given the right access — view or edit. Make sure a sensitive file wasn't left shared with only a few. For the group account itself, confirm the password is current and correct. GOOD TO KNOW The most common 'I can't get in' is simply signing in with the wrong email. People often have more than one; sharing to the one they actually use fixes it immediately. A quick run through these checks solves nearly every access hiccup. If something still won't behave, it's a fine thing to get a second pair of eyes on.

COMMON QUESTIONS**18. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

29. Answers to Common Questions A few questions come up again and again when a board sets up its first shared drive. Here are short, honest answers to the ones heard most. 'Does it cost anything?' A free account holds years of a board's records for most groups. 'Is it safe?' Yes, with named sharing, a strong password, and the extra login step. 'Can two of us edit at once?' Yes, and you'll see each other's changes right away. 'What if someone deletes something?' Version history and the trash make it recoverable. 'Do members need an account?' Officers do; you can share read-only with others as needed. **GOOD TO KNOW** If a question here makes you nervous about starting, that's normal. Most boards find it far simpler in practice, and the first setup takes about an afternoon. If a worry is holding you back, it's worth a short conversation before you begin. There's rarely a question here without a reassuring answer. **A SIMPLE START** 30. If You Only Do Three Things Perhaps the whole guide feels like a lot. That's all right. If you do nothing else, these three steps give your board a real, working home for its records.

- 1 Make a free account in the board's name and a shared drive inside it.
- 2 Build four folders — Minutes, Finances, Policies, Admin — and a minutes template.
- 3 Share edit access with the secretary and chair, and keep the password where two officers can find it. That's a complete, working board drive. Everything else in this guide simply makes it tidier. But those three steps alone give the board one safe place for its memory. **TIP** Done beats perfect. Set up the folders and the template, file the last few meetings' minutes, and refine the rest as you go.

GETTING STARTED**19. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

31. Getting Your Drive Going You now know the whole shape of it: a group-owned drive, a few plain folders, a minutes template and routine, careful sharing, and a safely kept password. The best time to set it up is soon, before another document goes missing in someone's inbox.

- 1 First: make the group account and the shared drive.
- 2 Build your folders and your minutes template.
- 3 File recent minutes, the bylaws, and the latest budget.

- 4 Share edit with a couple of officers and view with the board.
- 5 Record the password where officers can reach it. GOOD TO KNOW You do not have to remember all of it. You just have to remember you can call. Friendly, in-person help for boards and groups around Portage County — I come to you. (330) 200-8042. A shared drive is one of the simplest changes that makes a board feel organized and safe overnight. Take the afternoon, set it up, and watch the lost-document scrambles disappear. BILL'S HERE TO HELP 32. You Don't Have to Set It Up Alone If any part of this feels like more than you want to take on — making the group account, building folders, setting up sharing and a template — that's exactly the kind of thing I help local boards with. There's no such thing as a silly question, and I'm glad to sit down with your officers and get it all working. I can set up the group-owned drive, build a tidy folder layout and a minutes template, get your sharing right so the record stays safe, help you scan in the old paper box, and show your secretary how to keep it all going. Then I leave you with it working and a simple written cheat sheet. GOOD TO KNOW Friendly, in-person tech help for boards and people around Portage County. I come to you. If you are not happy with a visit, I will make it right. (330) 200-8042.

CHEAT SHEET

20. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech

Whether you set it up yourself with this guide or give me a call, the goal is the same: one safe place for your board's memory, so nothing is ever lost and every officer can find what they need. Everyday Cheat Sheet Keep this page handy. It points you straight to what to do for each task. I want to... Do this Pick one home A free Google Drive holds years of records for most boards Make it the board's Build it in a group account, not an officer's personal one Build plain folders Minutes, Finances, Policies, Agendas, Admin Use a minutes template Copy it each meeting so every set looks the same Edit for few, view for many A small circle edits; the board reads Share by name, not link Never put finances or the roster behind an open link Keep approved minutes safe Don't edit them after approval; correct in the next set Guard the password Keep the account key where two officers can find it Get help Call Bill: (330) 200-8042 WORDS TO KNOW Plain-English Word List Shared drive — A set of folders that lives online, so the right people can all reach the same files from any device. Group account — An account in the board's name, not a person's, so the records stay with the board when officers change. Access (view vs edit) — What a person is allowed to do with a file: 'view' means read only; 'edit' means they can change it. Version history — The drive's memory of earlier versions of a file, so a mistaken change can be undone. Minutes — The official written record of what a meeting decided — motions, votes, and action items. Draft vs approved — A draft is the unofficial first write-up; approved minutes are the official record, accepted by the board.

21. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech

Agenda packet — The agenda plus supporting documents, shared before a meeting so members arrive prepared. Retention — How long records must be kept; some, like minutes and bylaws, are kept permanently.

HOW I CAN HELP**22. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

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AT A GLANCE

A Picture to Follow Along

One Shelf for the Board's Papers

Minutes, bylaws, and reports in one place the whole board can reach.

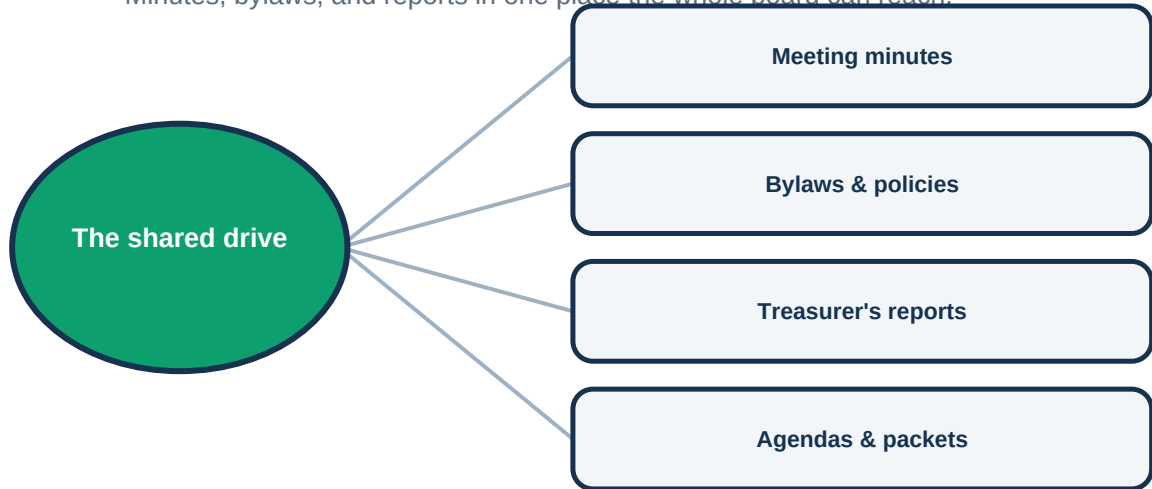


Illustration — a schematic. Set-up screens differ; each takes only a few minutes.

AT A GLANCE

A Second Look

From Scattered Files to One Place

Each box is a short, calm step you can do once.

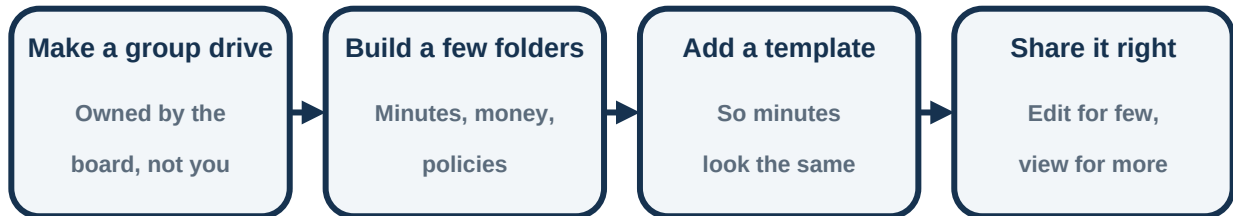


Illustration — a schematic. The order is a suggestion; do one box at a time.

A schematic of the plan — company steps vary; the order does not have to.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

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GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

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