



From PDFs to productivity: Why StellerVista Credit Union chose Aprío board portal.



StellerVista Credit Union

Location: Kootenay and
Boundary regions,
British Columbia, Canada

Established: 1948

Profile: StellerVista is a locally focused credit union serving approximately 20,000 members across 7 branches in the Kootenay and Boundary regions of B.C. Becoming StellerVista in 2023, through the merger of Heritage Credit Union and East Kootenay Community Credit Union, with assets exceeding CDN\$700 million, this member-led organization is governed by a 9-person board committed to creating positive impact in the communities they serve.

How does a newly merged credit union—with limited staff resources and multiple branches—modernize governance without overtaxing staff and directors? StellerVista needed simplicity, security, and responsive support that wouldn't break the bank.

This case study shares how StellerVista reduced administrative workload, streamlined board meeting preparation, and modernized board governance following their merger.

The challenge

Prior to the merger that formed StellerVista, board prep and management was a tedious and time-consuming process. "Before Aprío, I was manually compiling PDFs and emailing them out, which was labour-intensive work. When the decision to merge was made, and our asset size increased, we knew it was time to get an official board portal," explains Pam Pinch, Corporate Secretary at StellerVista Credit Union.

The merger meant combining boards with different levels of governance experience, familiarity and comfort with technology, and geographic locations across the Kootenay and Boundary regions. The manual processes used prior to the merger couldn't efficiently support the more complex needs and increased governance responsibilities of the larger credit union and its expanded board.

The approach

StellerVista set out to find a board portal solution before their merger was finalized. After consulting with a network of credit union executive assistants and governance professionals, Aprío emerged as the recommended choice among peers.

"I went out to my network and the resounding response was that many credit unions chose Aprío and had been using it for quite some time—including many that, like us, moved to the portal following a merger. It made Aprío the obvious choice," recalls Pinch.

The credit union conducted a thorough evaluation, comparing Aprío against alternative board portals—including Diligent, which they found both too expensive and too complex for their needs.

Aprío stood out for its budget-conscious pricing, ease of use, and secure web-based access, which was perfect to support directors who frequently travel. Strong recommendations from peers in the credit union industry, and from incoming directors who were already familiar with the portal, served to further solidify StellerVista's decision.

"From my point of view, I was looking at how we could work smarter, not harder," reflects Pinch. "Aprío was the right level of technology for us. And I didn't need to onboard anyone myself or provide technical support—directors scheduled training directly with the Aprío support team in their own time."





Key results:

Several hours saved each month on board preparation and communication

More engaged board members who are ready to contribute

Easy-to-use platform that works for directors of all technical skill levels

Board documents stay secure and confidential

The impact

Now, with easy access to centralized documents, a user-friendly calendar dashboard, and exceptional customer support, StellerVista's board has become more self-sufficient and engaged. Board members can access materials from anywhere, which has been particularly valuable for board members who travel often. The user-friendly portal makes it simple for directors with all levels of technical experience to use Aprio with confidence.

Using Aprio, the board now has the tools and access they need to focus on what truly matters—serving their members and communities.

Saving time while making good governance simple

Where once Pinch spent hours each month assembling board packages—building and merging PDF documents, sending attachments via email, coordinating meetings, and making revisions and updates—today board materials are uploaded directly to the portal and accessible to everyone instantly. Any revisions are uploaded to the portal, which ensures directors always have access to the latest version.

Increased engagement among board directors

Now that directors have simple, secure web-based access to board materials, they're empowered to log-in whenever—and from

wherever—they want, resulting in a more self-sufficient and engaged board. Features like the calendar dashboard, annotations, and document search enable directors to stay up-to-date and prepared for meetings and discussions ahead.

"The calendar dashboard keeps everyone on track. Directors can see upcoming meetings and access materials without needing to ask me. It's made our board more self-sufficient," explains Pinch.

Industry-leading support when it matters most

The 24/7 support has proven invaluable. Pinch shares: "I was on holidays—on a boat in the middle of a lake—and realized I'd forgotten to publish a board package. In a panic, I called Aprio on a Saturday morning, and they resolved it quickly for me. It was probably the best customer service I've ever had."

Room to grow as StellerVista continues to evolve

While StellerVista is currently focused on core features like document management and using the calendar dashboard to streamline meetings and communication, they're looking forward to expanding their usage to include surveys, reporting capabilities, and task management in future as their board governance needs continue to evolve.

"I evaluated several board portals, but Aprio was the right level of technology for us. It gave us exactly what we needed without overwhelming our directors. Aprio offered ease of use, excellent customer support, and room to grow, without breaking the bank—exactly what we needed for our board."

PAM PINCH, CORPORATE SECRETARY, STELLERVISTA CREDIT UNION



Find out more

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