

CUES® improves efficiency and security with BoardEffect

CUES case study

Organization overview

CUES is a membership organization serving more than 50,000 credit union leaders. Headquartered in Madison, Wisconsin, CUES advances credit unions through leadership development, educating and supporting CEOs, executives, directors and emerging leaders through partnerships with premier business schools, live and online events, digital learning, networking and premium content.

Founded in 1962, the CUES mission is to amplify credit unions by developing leaders who meet the unique needs of their organizations and the communities they serve. CUES creates powerful relationships and facilitates connections that provide invaluable support throughout members' leadership journeys.

Ruth Shirley serves as the executive administrator and board liaison supporting both the chief executive officer and the board of directors.

Organization: CUES

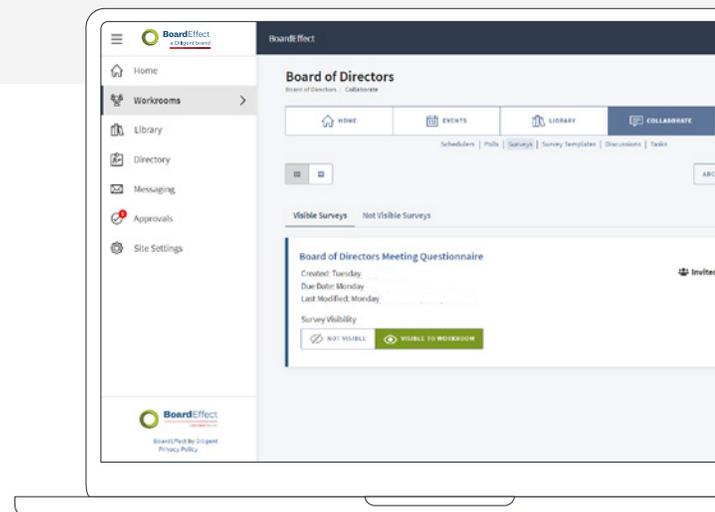
Industry: Membership organization

Location: Madison, Wisconsin

The challenge

Speed and confidentiality concerns

Upon joining the organization, Shirley noted that executives and board members were using a board management system that was difficult to navigate. They transitioned to a different solution, but that too was not user-friendly. The time spent gathering information and preparing agendas and board books was excessive, often taking two to three weeks, creating delays as well as additional work for administrative assistants.





A top priority for CUES leadership was security and confidentiality in all board and committee communications. The board also sought a method to easily review, approve and sign official documents. These, along with the need for board members to seamlessly participate in committees with assurance that vital information was accessible and secure, led the executive team to turn to BoardEffect.

The solution

BoardEffect's secure and efficient technology

After a demo of BoardEffect's many features and benefits, Shirley said that the "CEO and board chair loved it." The transition process was smooth and efficient, and immediately board directors started using the software's advanced features. For additional support, they participated in training sessions, consulted the software's knowledge guide and engaged with BoardEffect's customer success specialists when necessary.

As directors and administrative staff grew even more accustomed to using the new board management solution, they realized benefits right away. Board books and agendas were produced quickly and with a greater level of accuracy. "I love the agenda management feature; it helps me create the book faster," explains Shirley. The Resource Library also provides easy-to-use, secure hosting for the storage and distribution of essential board documents.

Board members can now view board meeting minutes, strategic plans, budgets and motions, by easily logging in to BoardEffect to view, sign and approve documents. They receive email notifications to let them know that action is needed.

"We have significantly saved time. Previously, we spent two to three weeks preparing the board book, but now it takes less than a week."

Ruth Shirley

Executive Administrator and
Board Liaison, CUES

"I love the agenda management feature; it helps me create the book faster."

Ruth Shirley

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The results

Greater efficiency and security

BoardEffect has brought measurable benefit to CUES Board of Directors and senior leadership. Security is superior, collaboration is easier, and decision-making is faster and more efficient. The user-friendly, mobile platform also gives board members confidence that they can quickly access and deal with important issues affecting CUES membership. BoardEffect helps directors guide the organization in its mission to be the trusted, single source for members' professional development needs.

BoardEffect Workrooms empower CUES directors to easily participate in committees such as Finance & Audit, Governance & Nominating or the Executive Committee. The Workroom Library gives users secure and quick access to pertinent documents for evaluation and action.

Confidentiality with legal or sensitive information has vastly improved with BoardEffect. "I post our financials monthly in the portal. The right stakeholders have access, and there's no worry about this information being shared," Shirley said.

BoardEffect has also improved efficiency by greatly reducing the time needed to gather and produce board books from two to three weeks to less than one week. The agenda management feature offers efficiency benefits like streamlining the preparation process, managing agenda updates and approvals, collaboration tools, and meeting book templates to save time on future prep.

Shirley and her team are eager to implement BoardEffect's many additional features, such as survey and polls functionality and videoconferencing integrations. "There are some features I have not tapped into yet, and I look forward to learning more," she said.

About BoardEffect

BoardEffect provides innovative boardroom technology to nonprofit organizations. As a Diligent brand helping to serve over 14,000 mission-driven organizations, we empower boards with the tools to drive positive change. Our secure board management software helps to streamline operations, enhance governance practices and enable confident decision-making. With BoardEffect, mission-driven organizations can unlock potential, accelerate mission delivery and make a lasting impact in their communities.

"We set up a demo with our CEO and board chair, and they loved it."

Ruth Shirley

Executive Administrator and Board Liaison, CUES

- ✔ Significant time savings and increased efficiency
- ✔ Easy and streamlined board book and agenda prep
- ✔ Simplified, secure access for board members and staff
- ✔ Enhanced collaboration and decision-making

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