



Aprío impact at *FAIRWINDS* Credit Union.



FAIRWINDS Credit Union

Location: Orlando, Florida
Established: 1949

Profile: With \$4.5B in assets, Florida's third-largest credit union serves over 225,000 members and employs over 600 people.

How can a large credit union with several senior board members and varying levels of technical skills make the shift from paper board documents to a secure online board portal?

This case study with *FAIRWINDS* Credit Union explores how Aprío's board portal enabled the seven-member board to shift to paperless board meetings and how exceptional customer service helped make this transition easier.

The challenge

Prior to using Aprío, *FAIRWINDS'* board administrators relied on manual printing, binding, and mailing out board materials to ensure secure distribution to the board. If a board packet needed updating, board administrators had to reprint and then hand-deliver, often in multiple trips. The administrative effort required for each board meeting was not only time-consuming but also costly.

Then, security became a growing concern during the pandemic. As Executive Administrator Deanna Newell explains, "We needed to get board materials out securely to board members, but we or even FedEx couldn't simply drop off board packets at their front door unattended. We really needed something more secure and more convenient than printing out and binding 12 board packets and then driving around on weekends to deliver them."

The approach

FAIRWINDS needed to keep its financial information safe and secure, while helping board members better prepare for meetings and improve board engagement. While reviewing other board portal solutions, *FAIRWINDS* IT leader ultimately chose Aprío for the software's security.

Now with Aprío, all board materials including financial and corporate documents, meeting minutes, and bylaws are stored securely in the central library. If documents change ahead of the board meeting, board administrators can alert board members with the latest version.

Aprío's customer service team was also important in supporting the use of the technology. "Aprío's customer service is phenomenal," explains Newell. "When we first started using Aprío, Aprío's customer service team was so patient with us, whether it was night or days or on weekends. They respond quickly and are really good at troubleshooting."

When it came to training board members, many chose to do one-on-one sessions at home. "Being able to do the training individually was really helpful as some of our board members move faster than others with technology," explains Newell. "We have three board members between 70 and 86 years old. The customer service team is really personable and really patient with our board members."





Key results:

Enhanced data security

Significant reduction in prep time and costs for meeting packages

More timely director updates

The impact

After three years of using Aprío, *FAIRWINDS* Credit Union has eased its board administration efforts and reduced operational costs, while keeping its data safe and secure.

- **Top-level security** – Confidential and sensitive financial and company information is now fully secured, protected by layers of advanced security and requiring login authentication for access.
- **Reduced administrative burden** – Board administrators spend significantly less time preparing board packets and can provide more timely updates to directors. No more driving around on weekends to deliver board packets or hauling large reports to planning meetings.
- **Lower operational costs** – *FAIRWINDS* now saves thousands each year on printing and courier costs, while also lowering its environmental impact.

The trade off

Technology usage for boards with a mix of technical skills and older members can be tricky. For *FAIRWINDS*, board members use fewer features than administrators.

“Our board members don’t use all of the functionality in Aprío but they do value the patient one-on-one training and support,” explains Katie Wade, Administrative Assistant. “Aprío allows us to keep it simple and not have to use every single feature so we can accommodate our older board members.”

“Aprío’s customer service is phenomenal. When it came to training our board members, the team was really personable and really patient. Being able to do the training individually was really helpful as some of our board members move faster than others with technology.”

**FAIRWINDS EXECUTIVE ADMINISTRATOR
DEANNA NEWELL**



Find out more

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Aprío makes good governance simple. We streamline the work of board meeting preparation and communication by providing an easy-to-use, secure board portal with unmatched expert service for directors and board administrators. Our service makes us the first choice of credit unions and financial services, health and education organizations and crown corporations across North America. Founded in 2003, we’re proud of our lasting governance impact and track record for the best customer experience in our industry. Visit www.aprioboardportal.com to learn more.