

United Nations Federal Credit Union makes the switch from extranet to Aprío board portal.



United Nations Federal Credit Union

Location: Long Island City, New York

Established: 1947

Profile: United Nations Federal Credit Union (UNFCU) serves a global community of nearly 225,000 members including staff, families, and retirees of the UN system. Headquartered in Long Island City, New York, UNFCU has branches in New York and Washington, DC, and representative offices in Europe and Africa. The financial cooperative has \$8.6 billion in assets under management, as of September 30, 2023.

How can a board with global members operate efficiently despite multiple time zones? UNFCU had outgrown its static board extranet and was looking for real-time board management tools.

This case study shares lessons from evaluating which board technology best provides time-saving tools and exemplary support to run monthly board meetings.

The challenge

After using an in-house built extranet to provide access to board materials and commonly used files to the board, UNFCU saw the need to enhance its meeting management and expense reporting capabilities, and, in this way, better support a diverse, 9-member board spanning multiple countries and time zones.

UNFCU wanted more self-serve features for board members to prepare for meetings. This would provide more automation of routine board tasks to save the board administrator team time and user-friendly technology that was cost-efficient and could be expanded to grow with the credit union.

The approach

UNFCU evaluated six different board management technology vendors. Each provider was asked to detail how their technology and service team could be the right fit for the global UN board.

Aprío stood out as providing ease of use, essential capabilities, and training and service to support a global team. "We looked at

multiple vendors and Aprío had enough capabilities to save time without being complex. Even during the evaluation process, Aprío was curious and really wanted to understand our needs. They were willing to make improvements to the platform to help us derive great value," explains Anna Bertacchi, Assistant Vice President.

The impact

Now, with easy access to centralized and searchable board information, 24/7 support, expense reporting, and automated tools for meeting prep and management, UNFCU's board has become even more efficient and productive. Additionally, the move from their extranet to the new portal proved seamless as a result of Aprío's assistance with set up and one-on-one training for all directors and administrators.

"User friendliness and training are outstanding with Aprío. I couldn't find any other platform that offers that caliber of ease of use plus personalized training and ongoing support from their team," says Bertacchi.

Support for directors in any time zone

With board members on multiple continents, responsive user support was a critical requirement from UNFCU. Now board members can contact Aprío 24/7 via email or phone for help exactly when they need it.

"During a board planning session in Santiago, Chile, a board member needed access to board materials. She emailed Aprío and received assistance in 10 minutes. She was thrilled. That would never have happened that fast with our internal team manually processing the request," says Bertacchi.





Key results:

More efficient meeting prep & participation

Faster director support

Improved expense reporting

Expense reporting

Tracking and repaying directors for expenses in a timely manner was an issue for UNFCU. Using spreadsheets submitted via email often resulted in a lengthy manual process and delays in reimbursement.

Aprío's board portal provides expense reporting with expense submission, reviews and approvals done efficiently and securely online. With UNFCU volunteer board members residing worldwide, Aprío also added a quick link to a currency converter to ease expense submissions for receipts in Euros, USD, Kenyan Shillings and more.

"Aprío's expense reporting has been a game changer for us in terms of better supporting the frequent travel reality of our members," explains Bertacchi.

Time savings to set up & manage meetings

Before using a board portal, UNFCU had a solid system to collect board documents, convert to PDF, and consolidate and distribute a board package. However, Aprío offers next-level efficiency. It automated the board package creation process for board admins. When the board package is complete, it can be instantly distributed to all board members with tools to streamline agenda building and minute taking as well.

Aprío also makes it easy to manage secure access to board materials. This includes giving UNFCU's four board committees select access to documents that others need not view.

Room to grow

The UNFCU board was deliberate in picking a board management platform simple enough for quick adoption with tools to assist now and potentially add on in the future. They found that Aprío's capabilities for online voting and approving resolutions electronically during a board meeting enable them to gain even greater efficiency.

"Gathering signatures and approvals during a meeting could save our team even more time in board communication. We've quickly adopted the core features of Aprío and gained efficiency, and we see room to grow," adds Bertacchi.

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**ASSISTANT VICE PRESIDENT, UNITED NATIONS FEDERAL CREDIT UNION
ANNA BERTACCHI**



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.