

# Estacado Federal Credit Union

A Leading Credit Union Cuts Out Paper Making Meetings Easy

## ? THE CHALLENGE

Estacado Federal Credit Union (EFCU) was creating, printing, and shipping board packets with the help of several managers. For each meeting they would print up to 20 copies of the board materials that exceeded 100 pages each.

Board and Supervisory members either picked up their copy or it was mailed a week in advance to ensure it arrived with sufficient review time. Inevitably, the beginning of meetings was greeted by additional changes and addendums that were handed out to board members and supervisors. Often documents were shredded at the end of the meeting. Mark Roddenberry, Estacado Federal Credit Union's CEO, described five central challenges faced by their credit union as:

- 1) Keeping the board up to date when packets changed and information was updated
- 2) The delay in sending information by mail
- 3) Board members not having access to their old packets
- 4) Limited access to policies for officials
- 5) Limited disaster recovery with paper board books

Having worked with Passtageways OnTrack Vendor Management software, EFCU trusted Passageways to deliver a solution to meet the needs of their boardroom. They turned to OnBoard. To go paperless. To make their meetings easy.

## THE SOLUTION

Mark Roddenberry took the lead in converting their paper materials to electronic board packets. He recalled how he got his board started, "I demonstrated the product to the management and the board, assisted with getting them logged on and I also made the decision to use the product to store all of our policies. The first couple months, a few reviewed in advance of the meeting, but once they got used to OnBoard in the meetings, they began to review at home before the meeting." And if, while reviewing, they needed to reference old meeting material, It was all in one place, within OnBoard.

Estacado's board found OnBoard's instant real-time syncing ensured everyone was on the same page. Last minute changes no longer resulted in printing nightmares. They could upload the documents early and still make corrections without having to print and distribute new forms. Those who couldn't physically attend meetings now instantly received the most up to date board books. "Our biggest surprise was that policies changed during meetings could be uploaded with corrections the next morning and replace the outdated copy."



## THE RESULTS

OnBoard solved the challenges EFCU was facing while still dealing with paper. Their information is always up to date and in sync. No matter where in the world a director or supervisor is working. All their old meeting materials are in one place, instantly available for reference. Their polices are all stored within OnBoard, and updated within seconds of changes. And in case of disaster, their old meetings are securely stored.

Mark Roddenberry boasted that "Time has definitely been saved since we can make changes quicker and easier to Board packets. Disaster recovery has also been improved dramatically since now 20 managers and officials have immediate access to all year's Board packets and policies. Overall the experience has been very good and I have already started recommending OnBoard to my fellow CEOs. Having a centralized back up, a quick access source for board information, has been very successful. [Our Customer Success Manager] was extremely helpful in the setup and implementation process."



## Our Customers

We are committed to every credit union customers, staff, financial managers, and leadership who continue to inspire us to create a more collaborative world



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- Mark Roddenberry  
CEO, Estacado Federal Credit Union



Board Meetings Made Easy

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