



TED E. BEAR HOLLOW INC.

THE CHALLENGE

Rebecca Turner, Executive Director of Ted. E. Bear Hollow, Inc., credits her board chair with introducing BoardEffect to her organization, which provides free grief support programs for people of all ages. "He had used it previously and described the tool as an 'absolute must,' though not as a mandate, just encouragement." Without even an assistant at the time, Rebecca assumed her nonprofit was too small, as her board chair had come from a much more sizeable organization. With limited resources, she was accustomed to the "long version of all administration," including preparation for board meetings.

THE SOLUTION

Rebecca quickly realized that BoardEffect could almost be her personal assistant. Instead of filing, she could archive past board books and keep committee materials in their appropriate "buckets," making what once was difficult to retrieve readily available to those who need it.

Now, even with the support of an administrative assistant, Rebecca herself uses BoardEffect to ensure board and committee members have relevant materials before and during meetings. She also can see who logs in and monitor who will attend meetings. "It's accessible wherever I am, and wherever they are, so there's really no reason for anyone to be unprepared."



THE BENEFITS

While implementing BoardEffect has impacted various aspects of her organization's governance, Rebecca was most surprised by the effect on board recruiting. "We're using the platform as a tool to make life easier. It shows board members we're maturing as an organization, in that we're more professional and respect their time. As a result, the platform actually elevated the perception of our organization among prospective board members."



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"I wouldn't want to be without it now," Rebecca continues, "because it saves so much in time and headaches." She hadn't anticipated using the email and polling functions, but now relies upon both for exchanging information with board members more easily and quickly.

In addition, implementing BoardEffect has adjusted some of the board's work processes. Rebecca describes meetings are more meaningful because a larger percentage of the agenda revolves around strategy. With detailed reports contained in one place, board discussion can be focused on the future.

TIPS FOR SUCCESS

Rebecca offers some guidance for using BoardEffect most effectively:

- Identify early champions on the board AND staff. Buy-in starts with peer support; otherwise, the new tool is seen as yet another task for board and staff to master. When board and staff members present BoardEffect as a "lifesaver" to one another, it's believable.
- Learn in phases. The platform offers a lot of functionality, but it's impossible to learn everything at once "because it won't mean anything until you're ready." For Rebecca, each new phase has emerged at the right time.
- Leverage the BoardEffect Knowledge Base. Whenever Rebecca wants to learn new functionality, she turns to the platform itself for help. She reads the instruction guides. She also keeps an eye on announcements about webinars, even if she can't participate, as the topics themselves often inspire her to learn about something new.

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