

oneAdvanced

CASE STUDY

# Berwickshire Housing Association







#### Client

Berwickshire Housing Association

#### Industry

Housing

#### Project

Meetings & Board Management

#### About

1,851 Homes, 66 Staff



# Introduction

Berwickshire Housing Association (BHA) is an innovative organisation whose vision is “To create thriving rural communities”. To achieve this, they live by their values which include embracing and driving change. With an adaptable and creative outlook, it was a natural progression to consider how technology could improve the age-old process of creating and attending structured meetings.

Following a successful trial, Meetings & Board Management from OneAdvanced has been rolled out extensively throughout the organisation including to the main Board, Finance, Audit & Operations Committees, two subsidiary boards and the Senior Management Team.

Corporate governance is vital to the success of BHA and its Volunteer Board, who come from a variety of backgrounds. The Board require timely provision of papers from senior management and other parties to facilitate effective decision-making. These papers might include minutes of meetings, performance reviews, legal and statutory papers and new strategic proposals. Having all of this information available in the meetings assists BHA on their journey to running an open, honest and caring organisation, and that helps them to achieve their vision.



# Challenges

Recognising the limitations of paper-based meetings, BHA embarked on a process of digitising the process, using a combination of collation software and SharePoint to create a single PDF. While this was an improvement over the previous approach, packs were still printed and posted to meeting attendees, to give them something which they could make notes on and annotate.

Like many organisations administering a paper based system for the building and distribution of board and committee meeting packs, BHA faced common issues that included:

- The late receipt of board papers from authors, adversely affecting the preparation of the board packs
- Reduced preparation time for meeting attendees - the late despatch of papers was a major frustration
- The admin team frequently being over-stressed and working late to meet the distribution deadlines
- Constraints on preparation and research due to the manual searching of papers, either by the board or by a secretary
- Taking printers offline for up to two hours to produce the packs, and the cost of courier services to deliver them
- The risk of confidential packs going astray in a low security, physical process that relied on external postal services
- Delays at many different stages of the process hindering the timely distribution of board packs
- Issues with the combination of different software BHA used, resulting in failures at critical times

# Time for change

With a forward thinking and innovative culture, BHA embarked on a search for suitable solutions that would enable them to address the frustrations. BHA were keen to demonstrate their commitment to seizing opportunities for improvement that would benefit the organisation and its stakeholders.

A review of five competing systems was carried out, the aim of which was to recommend changes that would refine the ways in which the board transacted its business. Among the options reviewed by the board were simple email-based processes, processes based around in-house document management systems, and external, specialist board portal technologies.



# The solution

Following extensive research by the project team, Meetings & Board Management from OneAdvanced was selected as the preferred solution. It was the most intuitive and easy to use interface of all the systems considered, making it ideal for an organisation whose users had a range of IT skills. There was wide acceptance that the user experience was going to play a crucial role in adoption across the various boards, subsidiary boards and senior management teams.

Another strength of OneAdvanced's offering was the level of training provided. While the system was very easy to use, there was a commitment to ensure a smooth transition between paper and digital, which put both the organisers and meeting participants at ease.

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"While the system wasn't the cheapest on the market, compared to other board portals it was, by far, the easiest and most intuitive to use and we felt this gave better value for money."

**BHA Corporate Services Manager**

## Meetings & Board Management in a nutshell

- Easy to use, highly intuitive software
- Greater engagement from meeting attendees
- Well informed attendees so more productive meetings
- More focus due to the smooth running of meetings
- Last minute changes are easy to incorporate
- Decreased admin tasks for the meeting organisers
- Exceptional training and support allowed for a seamless transition



# The outcome

A structured, collaborative onboarding process followed, ensuring that all users (board, SMT, committees etc) and support staff were comfortable using Meetings & Board Management.

The support offered (online quick start guides, video tutorials and support desk) was used in the early stages of deployment, as is common when new systems are introduced. The level of support was responsive and helpful, meaning that all users had a high level of confidence, ensuring a smooth transition.

In the first year alone, Meetings & Board Management was used for over 80 board and subcommittee meetings, saving in excess of 66,000 sheets of A4 paper. Suddenly, the need to print 12 copies of 150-sheet board packs was gone, saving up to three hours per administrator for every meeting.

In addition to the immediate cost benefits in manpower, materials, photocopying and postal charges (estimated at £3,000 per annum) BHA has also benefited from the following:

- ✓ Meetings now run more smoothly with board members more focussed on key issues
- ✓ The power to highlight, add notes and other annotations, and to instantly find and see those annotations
- ✓ Improved navigation - it is quicker and easier to get to the right page, rather than flicking through sheets of paper

- ✓ The capacity to create meeting and document archives, which board members can search quickly and easily
- ✓ The ability to instantly create a meeting, invite anyone, and distribute documents from anywhere (office, home, hotel etc.)
- ✓ The assurance provided by Meeting & Board Management's secure distribution and protection of meeting papers
- ✓ Facility to make changes and load documents instantly and have them immediately available to all attendees
- ✓ Recognition for introducing successful technology with immediate, clear, financial and non-financial benefits

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"Given the benefits Meetings & Board Management would deliver, we expected the transition would be time consuming and intensive, at least in the early stages. Our experience was quite the opposite, as the system lightened our workload from day one."

**BHA Corporate Services Manager**





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“The interface was so intuitive and our team got to grips with it so quickly thanks to the training from OneAdvanced which I have to say was equally as straightforward. The board took to the system with as much enthusiasm as the organisers. Despite a little trepidation as to what the change would mean to their normal process, they quickly enjoyed the benefits and professionalism of the system.”

**BHA Corporate Services Manager**



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Want to know more about Meetings & Board Management?  
Contact us or speak to your Account Manager.

Get in touch



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