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CU\*ANSWERS

presents

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CREDIT UNION  
ELECTION

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MANAGEMENT SERVICE

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Increase number of votes.  
Generate more excitement.  
Pull in more nominees.

## WHAT WE DO FOR YOU

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“As a credit union member, you are an owner.” That marketing spin has been at the forefront of the credit union industry for some time. What we’ve seen though is that credit unions and their members don’t really understand what this means, or just don’t care. Board elections become a yearly task that’s a bother to perform, and voting in elections isn’t worth the time and effort to the member.

But what if this could be taken out of the hands of the credit union? What if elections became a way to sell your credit union’s worth to your members, and members became more involved in what it means to be a member?

CU\*Answers will work with Credit Unions to coordinate and run their board elections with the goal of generating more excitement, more nominees, and gathering a larger number of votes. Not only does this take the day to day work out of the hands of the credit union, but it effectively turns the board election process into a large marketing campaign designed to get greater involvement from the membership.

It is an exciting collaborative that offers different options to fit your strategy and budget, and one our partners will find extremely beneficial.

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## ELECTION SERVICES

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From the nomination letter to the final report of the teller of elections there are many steps and considerations when managing board elections. CU\*Answers has put together options to assist credit unions in this annual election event. Credit unions can select what works best to fit their needs and budget – from Election Consulting to a complete marketing package to CU\*Answers actually running the election from start to finish.

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# PACKAGE OPTIONS



## ELECTION CONSULTING PACKAGE

Interested in a second-opinion? This package provides an experience with educated consultants to review your current election process. Package includes:

Consultation, Recommendations and Detailed Task List



## ELECTION MARKETING PACKAGE

Add some extra pizzazz to your current election process. Our already developed marketing pieces will easily promote your election. Packages include:

Selected Marketing Campaigns, Print Set-Up, and Website Updates.



## ELECTION TELLERING PACKAGE

Allow us to take care of the ballot process with our Election Telling Package. Package includes:

Mailing Ballots, Configuring Online Ballot, Counting and Reporting Results.

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## SECURE AND COMPLIANT

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The robust CU\*BASE technology platform captures member votes online, while also ensuring that ballots cast are protected from tampering. A mailing service is required to ensure that ballots and other marketing material is sent out on a timely fashion, and a strongbox is available for receiving member paper ballots until the voting deadline.

What sets this model apart from other third parties, is that CU\*Answers enables credit union members to easily submit their votes while accessing their accounts securely in It's Me 247 online banking. This combined with the marketing and compliance resources available to the company make this a complete and affordable service to credit unions looking to take this off their calendars.

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## ELECTION CONSULTING PACKAGE

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CU\*Answers will meet with the Credit Union CEO or leader in charge of the election process. A thorough review of the credit union's bylaws will be performed and a report will be issued detailing the tasks involved in the election. This will include a detailed task list with deadlines that comply with existing bylaws. The report may also suggest recommended bylaw changes to bring them up to date with current election processes.

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## ELECTION MARKETING PACKAGE

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Several marketing campaigns have been developed to promote different aspects of the election process. Whether promoting the credit union difference with the "Become a Board Member" campaign or simply a "Get out the Vote" message that reminds member that they have a voice in the leadership of their credit union, our graphic design team has created a series of cohesive marketing materials that can be used as an election campaign series or a one-time event.

Credit unions can choose what fits their election strategy and budget. CU\*Answers will set a schedule for distribution, create a list for mailing, coordinate direct mailing with the printer, and work with the web services team for posting to website, OBC and It's Me 247 online banking.

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## ELECTION TELLERING PACKAGE

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For credit unions who would like to eliminate the stress of the ballot processing CU\*Answers Tellerling package may be a good fit. We will coordinate with Sage Direct to send out mailed ballots, configure the online ballot, count the ballots and report to results to the credit union.

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# MARKETING CAMPAIGNS

Campaigns include Poster, Statement Insert, Statement Onsert, Web Banner, OBC Banner and Website Content. (Excluding What's Next Campaign - Poster only)



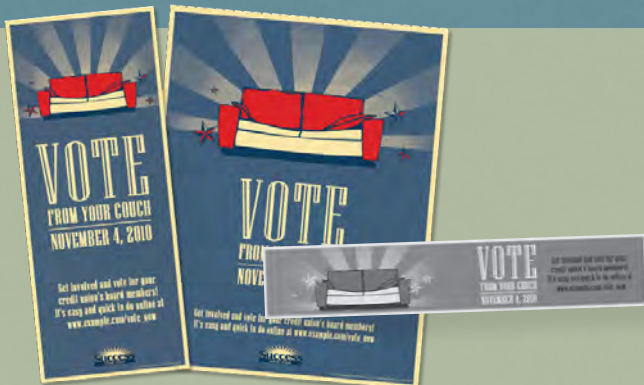
## BECOME A BOARD MEMBER CAMPAIGN

Sending this flyer lets members know that they have a voice and are eligible to run for a board seat.



## DON'T FORGET CAMPAIGN

Simply a "Get Out the Vote" message.

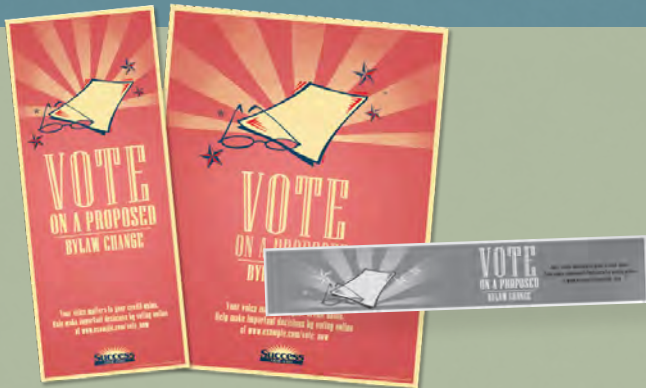


## VOTE FROM YOUR COUCH CAMPAIGN

Promotes online voting from the comfort of home.

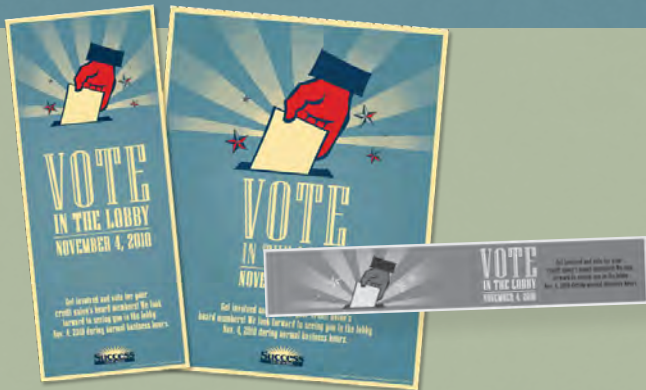


# MARKETING CAMPAIGNS



## VOTE ON A PROPOSED BYLAW

Use this flyer if you have a Bylaw Change.



## VOTE IN THE LOBBY

Let's member know there is an option for voting via a kiosk in the credit union lobby.



## WHAT'S NEXT

Sent with the Nomination Letter this flyer gives members a list of important dates.

# PACKAGE PRICING

## CONSULTING

\$100/hr - 8 hr minimum

Consulting includes review and revision of CU policies and procedures as they pertain to board elections with recommendations provided as needed.

## MARKETING

\$500  
+ printing, postage and shipping

Marketing material coordination—includes custom posters, flyers, onserts/inserts, communications to members, etc. Printing, postage and shipping will incur additional expense.

## TELLERING

\$1.00 per paper ballot  
\$0.05 per unique electronic ballot  
\$300 minimum fee for all Tellerling

Ballot Processing - counting, verifying and tabulation of all votes through various sources. Tellerling also includes configuration and implementation of the online ballot.

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## GETTING STARTED

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For more information about CU\*Answers Election  
Management Services please contact Melinda Haehnel at  
[mhaehnel@cuanswers.com](mailto:mhaehnel@cuanswers.com) or 800-327-3478 x 138.

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