



Community Banking Since 1855



The Cape Cod Five Cents Savings Bank
Charitable Foundation Trust

Problem:

A time and resource consuming manual grant process.

Solution:

Software to automate and integrate which also eliminated paper, reduced staff time, and increased reporting capabilities.

“Part of the beauty of it was that Bromelkamp worked with us to make their product fit us, instead of us fit their product.”

– Jo Marie Pollock

A Long and Rich History of Commitment Meets Today’s Technology

Cape Cod Five Cents Savings Bank has a long and rich heritage dating back to 1855 and the bank’s name, which references the minimum initial deposit to open an account. Today they have evolved into the largest independent bank on Cape Cod with assets exceeding \$2 billion. The bank has a strong commitment to their community and demonstrate this through their Cape Cod Five Charitable Foundation which provides grants to both teachers and non-profit organizations.

Updated Grant Process Needed

Although the bank had successfully evolved into the 21st century, Cape Cod Five Charitable Foundation’s grant management process lagged years behind. They had an extremely time-consuming manual process for accepting and reviewing applications, and notifying recipients. It also took time for the applicants who had to print and fill out paper forms, then either scan and email the documents, or deliver hard copies to the bank. Award notifications were sent via postal mail months later.

This protracted process required staff to review each application by hand to determine eligibility, with staff spending considerable time contacting the organizations for more information. Then, despite the Bank’s green initiative to reduce paper, staff had to copy the application documents and organize them into big packets of information that were sent to grant reviewers.

Data processing and reporting were time consuming and inconsistent at best. Data had to be derived from four to five sources and when time permitted information was manually entered, to varying degrees of detail, into an Excel® spreadsheet. Applications and supporting documents were scanned and filed into an elaborate electronic folder system that was difficult to manage and could take weeks to locate requested information.

“It was a nightmare when I needed to look in 20 different places to find the needed information”

–Jo Marie Pollock, Community Relations, Cape Cod Five Foundation

It was time to update the outdated grant management method to a software solution that made the process more efficient and aligned with their green initiative.

Software that Fits Their Process

Cape Cod Five Charitable Foundation decided to search for an automated software solution that eliminated the need for paper, reduced staff time, increased reporting capabilities and did not need ongoing IT staff involvement. Their search criteria included:

- › Online software that didn’t require hardware or installed hardware.
- › User-friendly interfaces for applicants, staff and reviewers.
- › Easy and instant access to data throughout the grant process.
- › Capabilities that met their needs both today and in the future.
- › An open, helpful and reliable vendor they could trust.
- › The ability to access the software from anywhere and anytime.
- › A software solution that fit their current processes.



Single login to one integrated solution

Manages the entire grant process on or off-line

Provides a full 360° relationship view with robust CRM

Works the way you do, now and in the future

Automated, agile and innovative platform

Inspired Design meets *Dynamic Technology*

About Bromelkamp Company

Bromelkamp Company provides foundations with integrated and online grant management software solutions that work the way you do. Their inspired design meets dynamic technology to provide software that manages your entire grant management process. Find out more at www.Bromelkamp.com.

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Cape Cod Five Charitable Foundation assessed a number of vendors and chose Bromelkamp Company for their product capabilities, flexibility to align with current processes and strong customer support. They selected FirstAkoya.net grant management online software to streamline record keeping, manage contact relationships, automate processes and simplify reporting capabilities. eGrant.net was chosen to provide data collection and communication tools that facilitate the entire grant cycle from applications to final reports, and integrates seamlessly into FirstAkoya.net.

Instant Information in a Few Keystrokes

Time savings are the two words that best describe the results of implementing the Bromelkamp online software solution. What used to take three months for staff to administrate a grant cycle now only takes 6 weeks. Bromelkamp's online software instantly records and stores information eliminating the need for printing, copying, scanning, mailing or filing, and aligning with their Green Initiative. Reviewers now receive all application documents electronically in one place to be reviewed anywhere and at any time.

Cape Cod Five Charitable Foundation completed the entire project from vendor selection to full implementation of both grant programs in just six months. Bromelkamp accommodated their need to implement each of their grant programs in separate phases to simplify staff workload.

"Bromelkamp was very supportive and responsive through the entire vendor selection and implementation processes. They were very organized on what they needed, quick to respond and never made me feel like my questions were a nuisance. The whole implementation was very easy."

–Jo Marie Pollock

More quality applications are coming in due to eGrant.net's ability to require input in select fields before the applicant can submit, saving staff time gathering additional information. Applicants like the ability to easily apply with a self-guided online application tool, upload supporting documents and check current status of their application.

The transition to online grant management software instantly improved reporting. Each application's contact information is automatically recorded and saved. Grant review and award information is electronically collected and linked to the appropriate contact records. Now reports are easily created and the foundation can quickly identify and categorize grants by organization, program type and geographic locations.

"There is so much more eGrant.net and FirstAkoya.net can do, and we are still just touching the surface. I love it and am happy with the service I get. We have a very nice relationship with Bromelkamp."

–Jo Marie Pollock

Connected. Committed. Creative.

