



Eastern Bank Charitable  
Foundation

# Client Case Study

Written by: Laura Kurzrok, Executive Director

## About

Since 1994 the Eastern Bank Charitable Foundation has worked to contribute, in a meaningful way, to the health and vitality of the various Greater Boston communities by providing financial support for selected nonprofit organizations. Our goal is to help the neediest in our communities. We are looking to ensure that our neighbors have a roof over their head, food on their table and a safe place for their children to go after school.

### Advantages of GLM

- Elimination of massive piles of paper from 1,200 requests/year and review cycles every 30 days
- Significant time savings in following grants lifecycle stages online with instant status details
- Easy applicant eligibility checking due to Foundant's integration with GuideStar Charity Check
- 100% applicant compliance through the creation of an application with standard required fields
- Email management tools for simple applicant follow-up using a pre-established email template

## A Need for Online Grants Management

The main reason we moved to an online grants management system was to eliminate the huge stacks of paper grant requests. Because we process over 1,200 request a year, and because we have a review cycle every 30 days, submissions could be in a variety of stages at any one time. To locate a request and know where it was in the process often meant searching through multiple piles of paper applications.

## Foundant GLM Implementation

The greatest benefit of Foundant Grant Lifecycle Manager (GLM) is that we are able to follow a grant through its various lifecycle stages and know instantly its status. This has been an enormous time saver, as well as a tool to ensure that all requests are considered in an appropriate and timely manner.

The second greatest feature is Foundant's integration with GuideStar Charity Check as part of the application review process. We are now able to determine, in a moment, the eligibility of the applicant, saving us hours of work linking our verification process with the application.

I would have to say that the ability to communicate with our requestors via email is a huge time saver that we did not anticipate. If something is missing from an application, we return the application and send an email, using a pre-established email template, eliminating the stream of phone calls back and forth. We still use the phone when a personal touch is needed, but the ability to send emails for a variety of reasons has increased our efficiency multi-fold.

## Future Plans

The transition can be challenging in the beginning—the system is new to you and to your users, but every step of the way, I always felt that there was someone at Foundant there to help me. And the new online help system lets you ask questions via email.