



# Client Case Study

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## About Bootstrap Montana

Founded in 2005, the Bootstrap Montana program has a two-fold mission of fostering economic development through entrepreneurship in Montana and providing interest-free micro loans to Montana small businesses.

## The Need for Online Grants Management

We are a very small team of three with a board of directors that is geographically dispersed and difficult to bring together for meetings and discussions. Furthermore, we serve a highly rural and poor state so communicating with people must be efficient and inexpensive. An online grants management solution seemed to be a natural fit for these issues of dispersed stakeholders and constituents.

## Challenges with Previous Process

Our primary challenges related to the collection of data from applicants in a common format. We were receiving grant requests through hand written letters, formal business plans, copies of other grant requests, and email attachments in all kinds of software formats and versions. This greatly increased the amount of time spent by staff in homogenizing the data and pushing it out to board members. Undoubtedly, our inability to receive data led to us missing out on promising grant requests.

## Benefits of Foundant GLM

Foundant GLM has cut the time our staff spends on reviewing incoming requests, communicating with applicants regarding missing information, prepping information for board review, and communicating results back to applicants. However, the time savings has only been the initial benefit for us. The archiving function offered through GLM has had a huge impact on our ability to accurately track decisions and follow-up. It makes our regular internal auditing processes simple and fast.

## Conclusion

Overall, we've been impressed with Foundant's commitment to understanding the needs of granting organizations. This has been reflected in their requests for input and their willingness to publish upgrades to the system based on that input.

### Advantages of GLM

- Significant time savings for staff in reviewing incoming requests and applicant and board communications
- Huge impact on accurate tracking and follow-up with data archiving and secure storage capabilities
- Consistent, on-topic communications through standard formatted responses to common follow-up tasks