

# Berkshire Bank

## Taking CRA Efforts to New Heights with AngelPoints

Over 165 years of financial expertise

Highly active in the community:

Employee Volunteerism / Active Grants Program /  
Scholarships / Corporate Sponsorships



America's Most Exciting Bank™

### The Challenge

They spent **hundreds of hours** each year manually tracking volunteer and CRA activities in spreadsheets.

Validating CRA-eligible activities was a **major headache**.

Ensuring data accuracy was a **major time drain** on human resources.

### The Solution

They found and purchased AngelPoints CRA. It's the only employee volunteering solution **built specifically for banks**.

AngelPoints CRA **streamlines** promotion, management, tracking, and reporting on your CRA-specific service activities.

“AngelPoints has allowed us to focus our efforts on program strategy, alignment with business goals, branding and employee engagement instead of simply tracking.”

—Gary Levante,  
Community Engagement Manager

### The Impact of AngelPoints CRA

**70%** less time spent administering programs

Increased volunteer events participation by **70%**

Exceeded CRA service goals by a whopping **530%**

Scored an **Outstanding** on the CRA Service Test self-assessment

Read on for Berkshire Bank's full CRA story...



## Life before AngelPoints

Berkshire Bank—with \$6B in assets, 90 branch locations, and 1,100 employees—has a long history of community service, but as their employee volunteering program continued to evolve, it became increasingly difficult to administer. Manually tracking volunteer efforts and transferring data from an annual survey into a home-built database, while also tracking CRA qualifying activities in a separate spreadsheet, was eating up way too much time. “Our old process was labor intensive and cumbersome,” said Gary Levante, Community Engagement Manager at Berkshire Bank. “Manual tracking had become such a burden that it could have been a full time job.” They soon wondered if perhaps there was a better way, and began to shop around.

## The Decision Process & the Move

They discovered AngelPoints CRA—the only employee volunteer solution made specifically to help banks track, coordinate, and report on CRA service activities. It offered the enhanced reporting capabilities they needed, was intuitive and easy to use for both staff and program coordinators, and met all of their operational, administrative, and data security needs. “We needed a vendor that also offered other products to meet our charitable giving/corporate sponsorship needs as well, which we were concurrently evaluating,” said Mr. Levante. “We were really looking for one vendor to handle our total community responsibility efforts.” After speaking with existing AngelPoints clients, they found their answer. “Every client we talked to spoke very highly, of the product and also the customer service,” continued Mr. Levante. “Plus, MicroEdge’s commitment to ongoing product development was a big draw.”

## New Beginnings: The AngelPoints CRA Difference

In their first year with the new system, Berkshire Bank exceeded their CRA service goals by 530%! How did they do it? “Everything is easier with AngelPoints,” said Mr. Levante. “Tracking projects, recruiting volunteers, reporting, engaging employees... It’s reduced the time spent on administering our volunteer program by 70%.” Indeed, the Berkshire success story is astounding, but with AngelPoints, such amazing results are within reach. To date, 90% of their employees have accessed the system and 80% have documented a volunteer event using AngelPoints’ intuitive customized dashboard. With the new system in place, employee participation in company-sponsored events rose to 70%. Plus, they estimate that the number of eligible service hours reported by employees rose by 50%.

But did their reporting improve? With all of their historical volunteer data stored safely in AngelPoints, as well as built-in census geocoding data, when it was time for Berkshire Bank to complete their internal self-assessment of CRA Service, the data was already available, organized, and ready to go. The increase in the number and accuracy of reported service hours will allow Berkshire Bank to easily report on their CRA eligible hours during their next CRA exam. When asked if moving to AngelPoints was the right move, Mr. Levante had this to say: “AngelPoints has allowed us to focus our efforts on program strategy, alignment with business goals, branding, and employee engagement, instead of simply tracking. As a result, we are seeing the true impact of our volunteer efforts on dozens of business and social goals, as well as the substantial ROI generated by our efforts. It will certainly continue to affect our overall CRA score and community involvement activities in a positive way.”

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**“MicroEdge has a track record of success over a number of years, as well as a positive reputation. Every client we talked to utilizing AngelPoints spoke very highly of the product.”**

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## Contact Us

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