Catapult

Breaking Down Barriers:
Automating and Streamlining the Grants Management Process for State Government

Implementation of a Grants Management System Enhances the Grants Process for Texas State Agency, Drastically Increasing Accuracy and Decreasing Overall Processing Time

Operating and managing a grant and funding resource program is challenging for any agency, and can become even more cumbersome as the agency size or number of grants increases. This Texas State Agency provides competitive grants supporting innovative information services, special needs programs, and literacy efforts across the entire state.

The Challenge

The Agency was struggling to manage this overwhelming financial responsibility with a dated, internally grown Grants Management System (GMS) full of manual procedures, limited navigation, bottlenecks, and redundancies. The Agency's employees found it impossible to meet high standards for soliciting, awarding, funding, and tracking grants processed through their system

The Agency began seeking proposals to provide a turn-key grants management solution which would integrate with their accounting, payroll, and procurement systems. The system needed to meet not only technical requirements, but to help identify and manage the organizational changes that were required to become a more efficient organization.

Based on Catapult's successful customer experience, their expertise in Grants Management best practices, and deep technical knowledge of Microsoft CRM, the Agency selected Catapult to lead the implementation. Over a few months, a cutting-edge GMS system was launched in parallel with refined and optimized business processes.

How Catapult Delivered

Catapult delivered a customized, cloud-hosted Grants Management System (GMS) based on Microsoft CRM Online to replace the Agency's home-grown solution. The new solution improved constituent experiences, streamlined the grants process, as well as improved reporting and transparency required for public organizations. The service provides excellent security and infrastructure and reduces internal management time, freeing up resources previously spent supporting the application.

Discovery: Catapult's team of business analysts uncovered numerous time consuming touches and redundancies. The many spreadsheets and reports created manually (UDAs, user developed applications) made the grant making process cumbersome and difficult to maneuver. Instead of providing a solution to match inefficient business procedures, the Agency capitalized on Catapult's process engineering expertise and the capabilities of the CRM solution to create a more efficient process.

Agile Adjustment: The team identified a future process for the GMS that aligned with the Agency's

regulatory requirements and eliminated the user developed applications (UDA). Catapult worked with both the technology and business professionals in parallel, to align their technology needs with their goals. The ideas exchanged during the meetings were systematically captured in the development of the CRM configuration.

Dynamic Refinement: The resulting new Grants Management process aligned perfectly with the solution, ultimately driving efficiency. It provided tailored interfaces for the back office administration, as well as creating a simple web interface for grantees and grant review panel members. Examining each step of their process with the Catapult team generated a faster, streamlined implementation and solution.

Immediate Benefits

- **Auditable, Traceable, and Compliant:** Agency process can now undergo and pass an audit by the governing agencies (State, Federal and internal). The system is in compliance and all audit requirements are traceable.

- **Trackable:** Agency employees and constituents can both follow the grants application process with easy-to-use interfaces.

- **Accurate Real-Time Reporting:** Eliminates errors and reduces labor by providing direct outputs to reporting agencies.

- **Transparency:** Entire grants application process and effectiveness is now visible to all parties.

- **Visibility:** Agency staff has more awareness and understanding of grant applicant demographics, as well as constituents' obstacles and impediments, during the entire process.

- **Integrated User Developed Applications:** Manual touches were greatly reduced by integrating 50 UDAs into the new system. The Contract Reports, Request for Funds, and Financial Status Reports were all previously done

> The CRM is working incredibly well for our internal grant reviews. I was able to get eight completed today, which is more than I've been able to do in the past. I was also able to check the federal award management system, update the expiration date, and see that update in the grant, in a matter of minutes. That is a HUGE improvement, just by itself. I almost shed of a tear of joy.
> -*Texas State Agency Grant Administrator*

manually. During implementation, they were automated and integrated into the solution along with many other UDAs.

- **Effective communication:** Agency's sub-agencies will interact more efficiently.

- **Reduced processing time:** Provides administrators with time to visit, interview, and follow grant recipients, giving them more insight to help constituents and enhance the grants process.

Results

This Agency's mission and philosophy is to provide all people barrier-free access to information, enhancing their personal, educational, and professional needs. Prior to implementation, bottlenecks and time consuming manual processes limited their team's effectiveness. Catapult's Microsoft CRM GMS solution has freed their staff to the needs of their constituents with accurate, up-to-date information, enhanced communication, and rapid processing, leading to more informed, productive citizens.

How can we help you?
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