Next Level Grantmaking

Universal Design Platform as a Service

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Digital Transformation"

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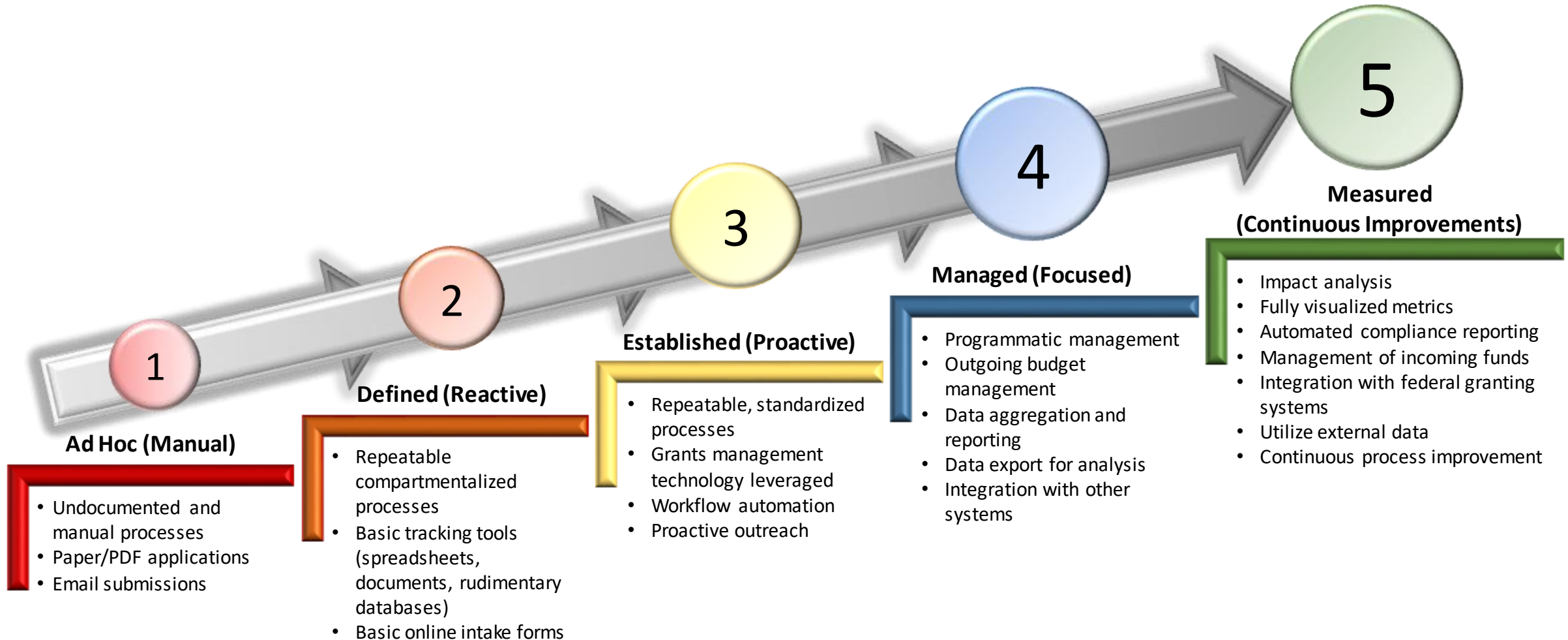**Learn more about us at: www.eTRANSERVICES.com**

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FR FedRAMP Moderate "Authorized"

Grant Maturity Model

1

Ad Hoc (Manual)

- Undocumented and manual processes
- Paper/PDF applications
- Email submissions

2

Defined (Reactive)

- Repeatable compartmentalized processes
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3

Established (Proactive)

- Repeatable, standardized processes
- Grants management technology leveraged
- Workflow automation
- Proactive outreach

4

Managed (Focused)

- Programmatic management
- Outgoing budget management
- Data aggregation and reporting
- Data export for analysis
- Integration with other systems

5

Measured (Continuous Improvements)

- Impact analysis
- Fully visualized metrics
- Automated compliance reporting
- Management of incoming funds
- Integration with federal granting systems
- Utilize external data
- Continuous process improvement
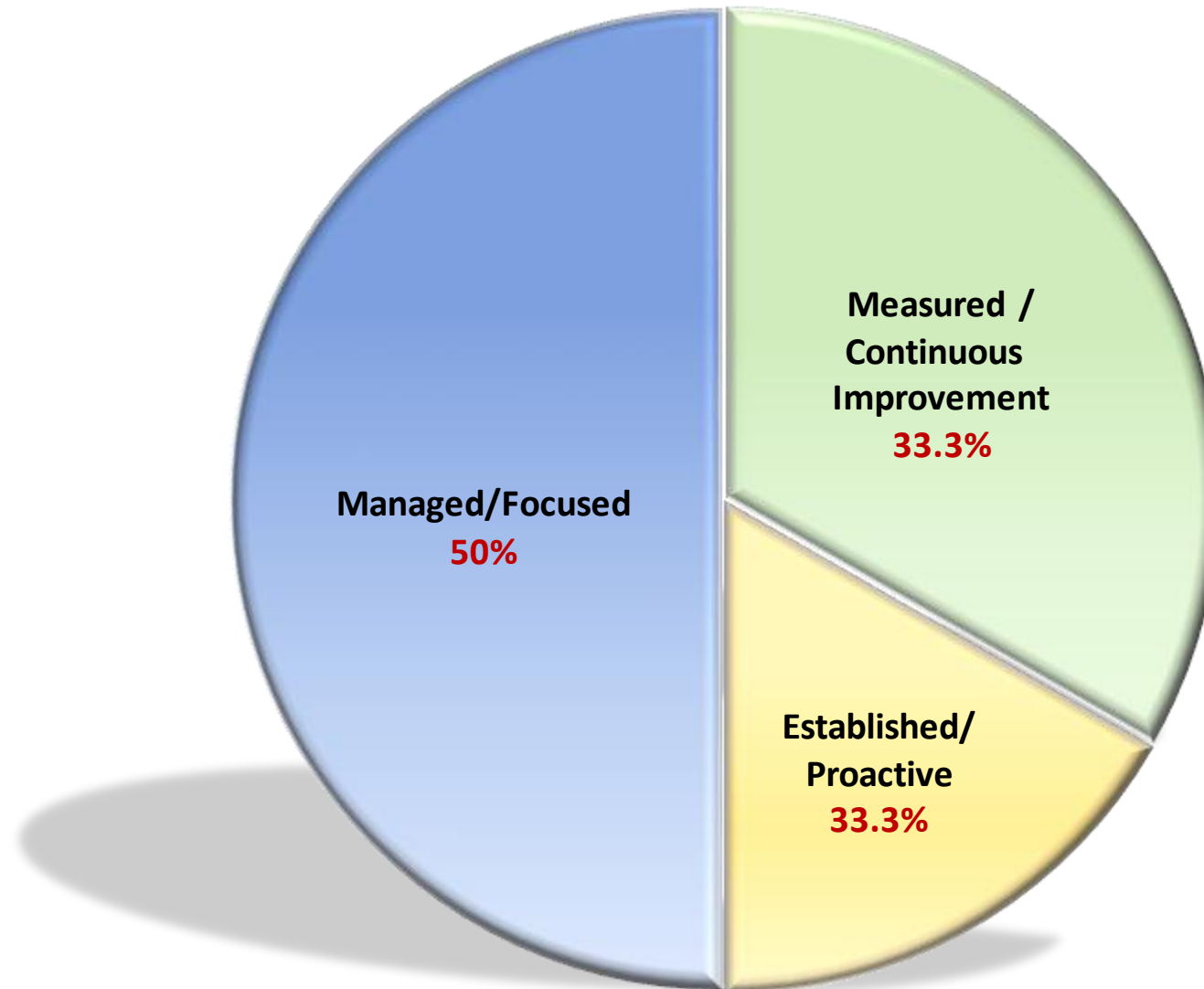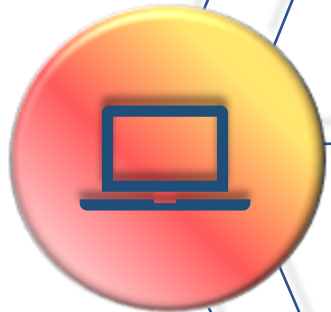
Recent Survey Results

Simple Application Management

Online forms are used to capture applications, proposals and reports

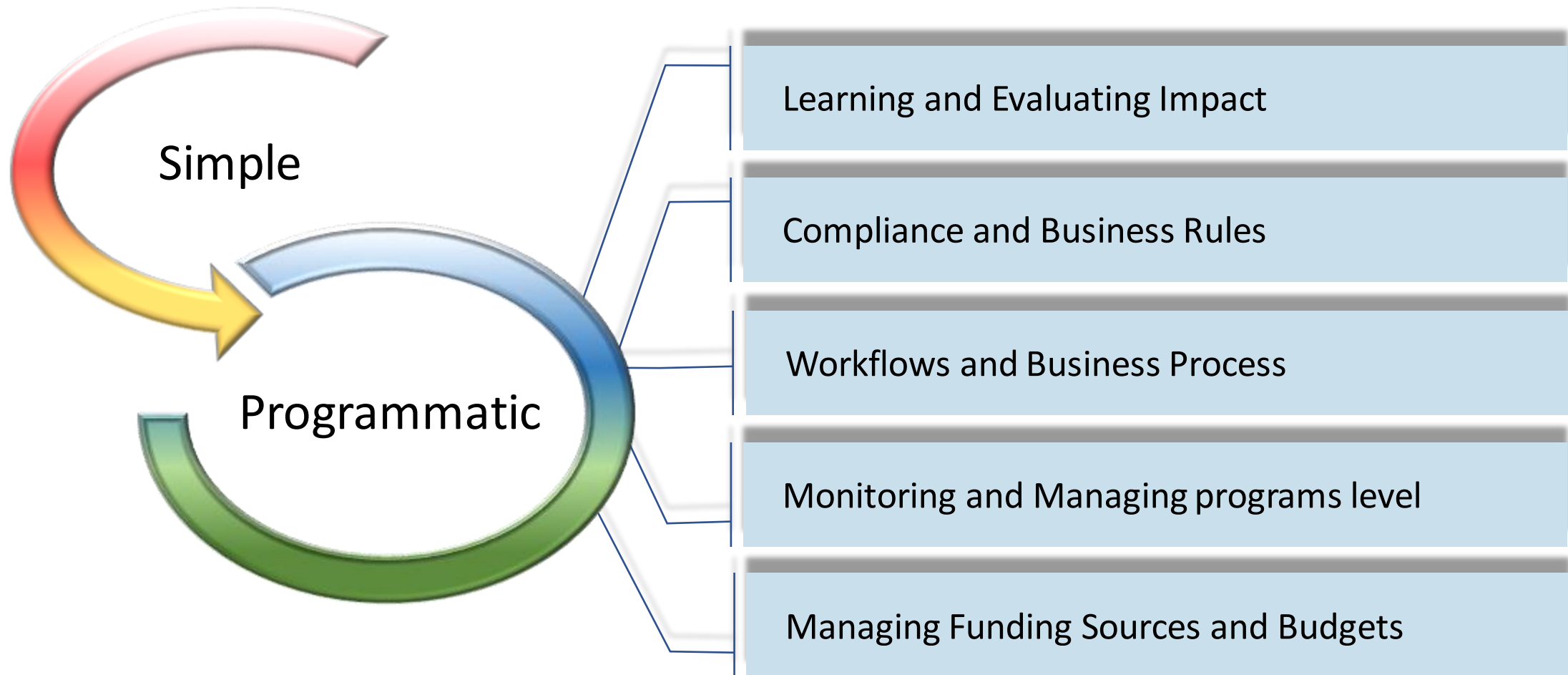Reports and analytics are focused on administration or operations

Budget management is cumbersome

Changes to programmatic policies, practices and procedures are done manually

Not taking advantage of tools and software that are available in the marketplace

Programmatic Grants Management

Simple

Programmatic

- Learning and Evaluating Impact
- Compliance and Business Rules
- Workflows and Business Process
- Monitoring and Managing programs level
- Managing Funding Sources and Budgets

Rather than managing grants one-at-a-time, manage grants from a programmatic perspective where we gather and analyze at the program level

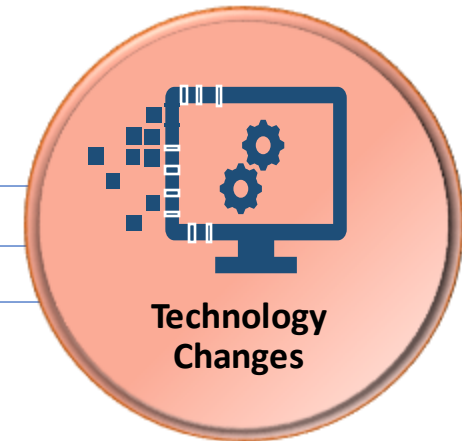# Becoming Defined and Reactive

5

4

3

2

1

Organizational Changes

- Repeatable application processes
- Rigorous application review and approval process
- Standardized award letters and grant agreements

Online forms
Website
Tracking spreadsheets or databases

Technology Changes

Becoming Established and Proactive

5

4

3

2

1

Organizational Changes

- Repeatable processes across the organization
- Key roles and responsibilities
- Proactive outreach
- Consistent review criteria
- Manual to automated

Technology Changes

- Grant management software
- Automated notifications
- Automated payment and report scheduling
- Grant agreement generation
- Online portal for applications and grants
- Online portal for review forms and criteria
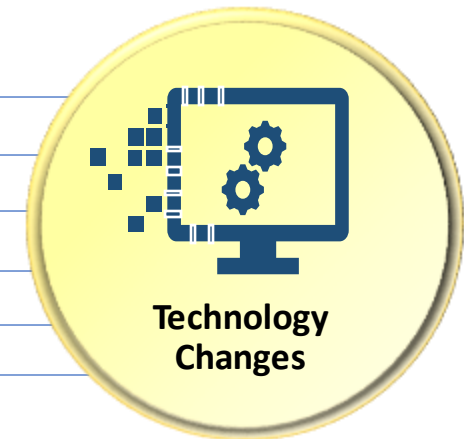
Becoming Managed and Focused

5

4

3

2

1

Organizational Changes

- Programmatic metrics
- Reporting requirements at the program level
- Programmatic business rules
- Budget tracking

Technology Changes

- Program metrics dashboards
- Metrics-based compliance reports
- Business rule enforcement
- Self-service portals
- To do lists
- Financial and e-Signature integration
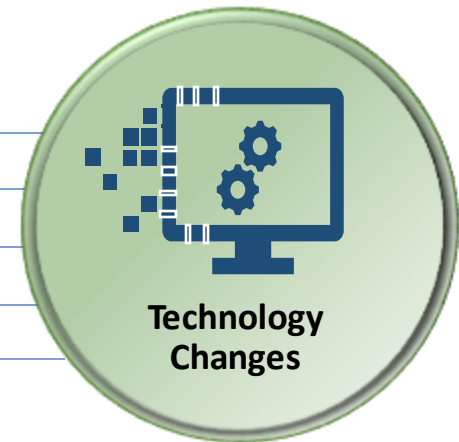- Funders' systems integration
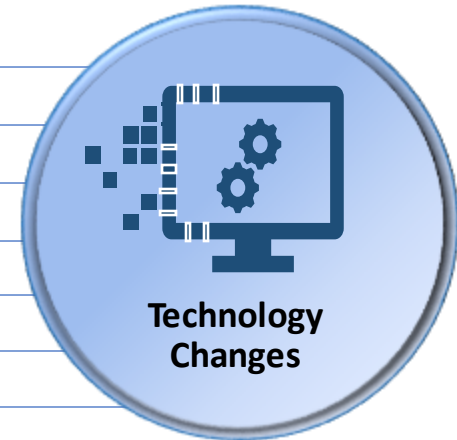
Becoming Measured and Improving

5

4

3

2

1

Organizational Changes

- SMART goals, objectives and outcomes
- Continuous improvement
- Compliance data needs
- Programmatic and societal measurements
- Gather and analyze data

Technology Changes

- Goals tracking
- Impact analysis visualizations
- Metrics collection
- Board Books or Knowledge Management sites
- Compliance reports

More Demand for Automation

Compliance becoming more complex

- Requires us to provide information that is not easily accessible
- Requires more than simple spreadsheets
- Requires an ability to adjust to the requirements as they change quickly

Grants need to be processed more quickly

- Streamline processing by using workflow notifications and automated validations
- Need to get funding out quickly to those in need
- Automation is needed for administratively burdensome

Impact Analysis is becoming more important

- Optimize limited funds to get the most social impact
- Need to define the key measures for the outcomes
- Acquire the data that is needed for measurements

With the Right Tools...

5

4

3

2

1

UDPaaS

Powered by eTRANSERVICES

Fully realized workflow automation

Reports and analytics tools offer real-time visibility

Budget management features and visualizations

Changes to program policy cascade to grant processes

Suite of customizable automation tools for your grant process

Grants Management Overview

Incoming Funds	Budget Formulation	Program Management	Application Submission	Review	Award	Monitoring and Closeout	Outcome Analysis

UDPaaS Platform
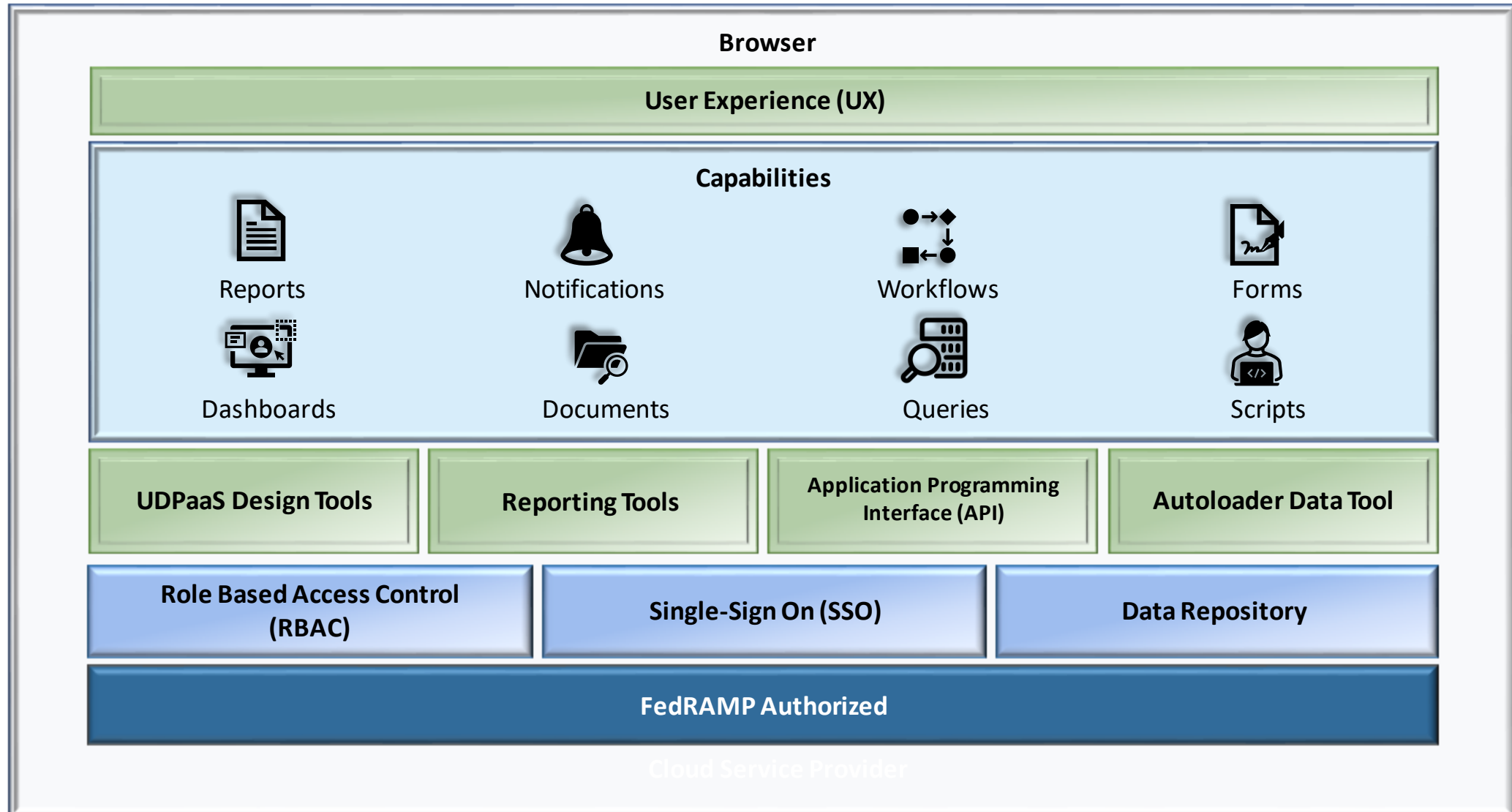
Live Demonstration

Grants Management Focus Areas

Application Management — 1 Ad Hoc or 2 Reactive

Program Management — 3 Established or 4 Managed
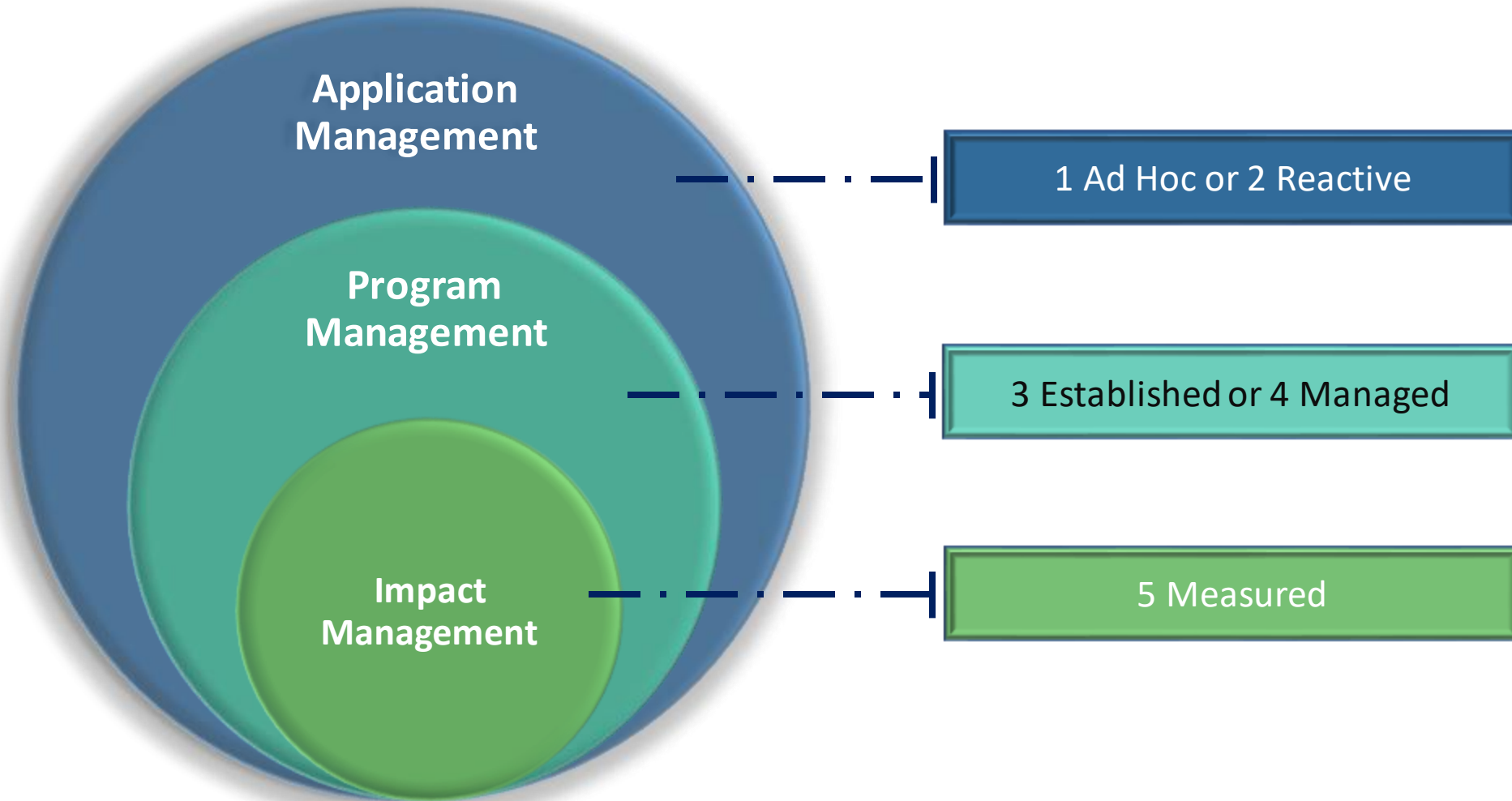
Impact Management — 5 Measured

Accreditations

DAWIA Level III Program Management

DAWIA Level II Information Technology

DAWIA Level I Requirements Manager

Questions

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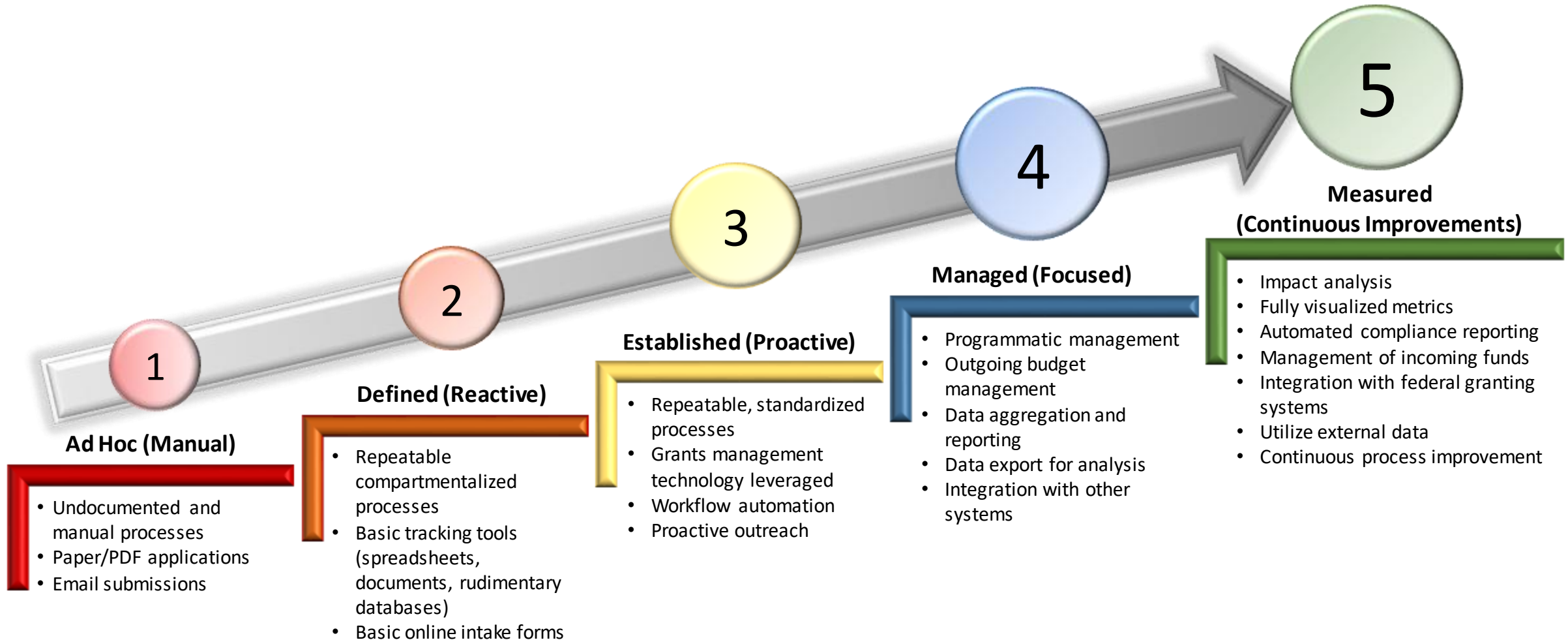**CONTACT US AT: SALES@UDPAAS.COM**

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Thank you