

The Grants Management System (GMS) is a Salesforce application created for agencies within the Indiana Lieutenant Governor’s Office as an enterprise solution to manage the process for multiple grants across many state agencies.



Our 21st century economy requires a government that can not only keep up, but that can competitively participate and adapt to our ever-changing needs.

We must push aside antiquated processes that are costly and time consuming, in favor of technology that reduces costs and resources utilized, improves services and satisfaction and delivers reliable information for data-driven decision making.

I am proud of the work that went into implementing the electronic Grants Management System and am confident this is another step that will take the State of Indiana and how we serve our communities to the Next Level.

—Lt. Governor  
Suzanne Crouch



**BUSINESS PROBLEM:** Prior to the introduction of the GMS, grant-related paperwork was mailed, faxed, or emailed and then printed off. This process was paper-heavy, labor-intensive, and the multi-layer hand-off process was inefficient. In the case of the Office of Community and Rural Affairs and the Indiana Department of Agriculture, staff would advertise available grants by posting that the application is open and forwarding emails to a public group of potential external applicants. Most often, the emails would contain survey links to apply for the respective grant. On a given date, the agency employees would search for the survey feedback and review the information received from each of the applicants.

### THE FORMER PROCESS



1 Grant application received via mail, email, or fax



2 Physical paper copies or emails of applications were then dispersed amongst agencies for review



3 Information uploaded into manually managed spreadsheets for tracking



4 Financial information (state and federal reimbursements, awarded money, available money) would be managed in spreadsheets

All exchanged information existed in emails, surveys, and spread-sheets, stored on local laptops and backed up on a local shared drive.

**SOLUTION:** In 2020, Revelant and aFit Staffing, two Indianapolis-based companies, partnered with the Indiana Lieutenant Governor’s Office on a user-friendly Salesforce-based system to develop the Grants Management System. With this integrated solution, the Lieutenant Governor’s Family of Business is now able to better monitor and improve management and delivery of large-scale community development projects which previously placed an undue burden on grant administrators and staff.

This enterprise system also has a CRM component which allows employees to log telephone calls, emails, meetings, client visits, etc. as they occur. Employees can schedule upcoming tasks and events, and each agency’s management can view and/or edit the upcoming tasks on their employee’s schedule. Employees of the Indiana Lieutenant Governor’s Office could plan their entire day with the CRM interface within the GMS.

Due to its cloud-based architecture, agency personnel access real-time data and information with confidence and ease. This became immediately valuable during the COVID-19 pandemic, ensuring continuity of service and even providing the ability for additional grant programs to be added easily to the GMS. This allowed the State to provide additional funding opportunities to communities, such as access to food distribution, personal protective equipment, and small business capital.

Ultimately, the GMS will create a historical database as it adds new grant programs and additional functionalities, further reducing the amount of information communities are required to provide and surfacing existing information for entering/validating applications.

**OUTCOME:** The user-friendly Salesforce Grants Management System has vastly improved the communication process between community representatives and the Lieutenant Governor’s office. Both communities and state agencies benefit from the automated processes built into the GMS for submission, approval and funding of grant applications.

**The GMS addressed these key process improvements:**

- 1 Improved agency user experience through an easy-to-use portal, online application, and grant administration user input
- 2 Enhanced visibility into real time data on community grants for executives within the Indiana Lieutenant Governor’s Office and state agencies
- 3 Easy tracking of state and federal funds reimbursements and disbursement
- 4 Configurable to meet unique business needs of individual agencies
- 5 Communication improvement through automation
- 6 Data transparency providing flexible reporting capabilities of agency activity
- 7 Greater internal and external user adoption through process consistency and efficiency
- 8 Fully integrated system – one system of record and cloud storage
- 9 Timely, accurate, and actionable data
- 10 Flexible and secure applications
- 11 360-degree view of the entire grant life cycle

Process automation and a single system of record also result in significant time savings. Agencies and communities enjoy budget visibility, and thus efficient management, leaving less room for inadvertent overspending and more room for efficient use of time and money.