Granting Greater Access to Public Funds
Your Tax Dollars at Work More Efficiently

The Challenge

The City of San Antonio (CoSA), Texas applies directly to the federal government for grants to further City goals and programs. Plus, the City facilitates, through its Department of Human Services (DHS), the disbursement of grants from state, federal, and third-party entities to support a variety of local programs and projects. But, because of new federal auditing and reporting requirements, the department needed to upgrade its grants management program so the department could approve and manage grants electronically.

Initially, CoSA contacted its Microsoft CRM software program developer, GrantVantage in Arlington, Virginia. The company manages several GrantVantage implementations for clients located throughout the U.S. via cloud technology.

> **BY THE NUMBERS**
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> ❖ San Antonio's Dept. of Human Services receives approx. $125 million annually in general funds, as well as state and federal grant funds, to provide direct program services in the areas of:
>   - ❖ Early Education & Child Care Assistance
>   - ❖ Adult Education
>   - ❖ Financial & Emergency Assistance
>   - ❖ Homeless Assistance
>   - ❖ Senior Services
>
> *Source: City of San Antonio, TX – Dept. of Human Services*

GrantVantage wanted to ensure enhancements to the GrantVantage system met the specific needs of CoSA DHS without impacting other GrantVantage clients. This required a singular improvement layered onto an existing software program, and GrantVantage did not have the bandwidth to timely complete the task.

To assist their client, GrantVantage needed a firm with qualified expertise in CRM programming and an excellent track record of customer support.

The TrinityTG Solution

After conferring with GrantVantage, TrinityTG met with subject matter experts from CoSA DHS to learn about their business processes in approving and managing grant disbursements and other related business processes. The goal for TrinityTG was to create new software that would mimic the City's existing labor-intensive approval processes.

TrinityTG then began, under the guidance and supervision of partner Sistema Technologies, to modify the GrantVantage Grant Management System.

One of the primary customizations developed by TrinityTG was virtual Routing Slip (RS) entity. The Routing Slips were created to guide users through the various approval processes and ensures their experience with the GrantVantage solution remains consistent with their existing processes.

An RS is created for each user involved in the now automated DHS business processes. The RS record is used to indicate whether or not the DHS staffer has approved the item being reviewed. Based on the reviewer's decision, the system would either generate a new RS for the next reviewer in the process, expand or decrease the number of approvers and slips based on conditional logic, and send notifications to DHS staff and/or the agencies being reviewed, or end the RS process if the user disapproved.

The new software went through numerous iterations, tests and revisions to ensure its durability and to validate that it met the client's needs.

A significant challenge was how and where customization components would function and appear visually within the custom interface of the GrantVantage system. The DHS customizations needed to operate seamlessly with the GrantVantage system and at the same time not impact other GrantVantage customers using the same version of the GrantVantage software. TrinityTG's expertise with CRM made this possible.

Throughout the process TrinityTG and partners provided a full complement of software development lifecycle services including project management, business analysis, design, development, testing, training, data conversion and implementation support.

The company followed a project management-compliant methodology that closely resembles the project management requirements defined by California for medium to large scale projects. The new solution solved myriad issues for the City of San Antonio and its Department of Human Services.

Key Client Benefits

REDUCTION OF WASTE: System allows for a transition to a paperless reporting system to meet Federal auditing requirements

GREATER EFFICIENCY: Efficiency has increased while manual requirements have decreased

INCREASED ACCOUNTABILITY: Transparency of how tax dollars are being used is now greater

ENHANCED AUTOMATION: System is now automated including a comprehensive email chain

DATA HAS MORE VALUE: New solution was more cost efficient than alternative of altering entire software

FURTHER FOCUSED RESOURCES: Maintaining existing software allowed maintaining existing staff preventing loss of institutional knowledge

IMPROVED SECURITY Email chain is now condensed allowing all users to view just one conversation

Trinity Technology Group

Trinity Technology Group in Sacramento has been building IT solutions and solving real business challenges for almost two decades. Our team of talented professionals – from business and quality assurance analysts to seasoned developers and project managers – work hand-in-hand with you to create plans for each critical process, and then deliver solutions to meet the specific needs of your organization.