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# Unlocking Euna Grants, Business Processes & Analytics
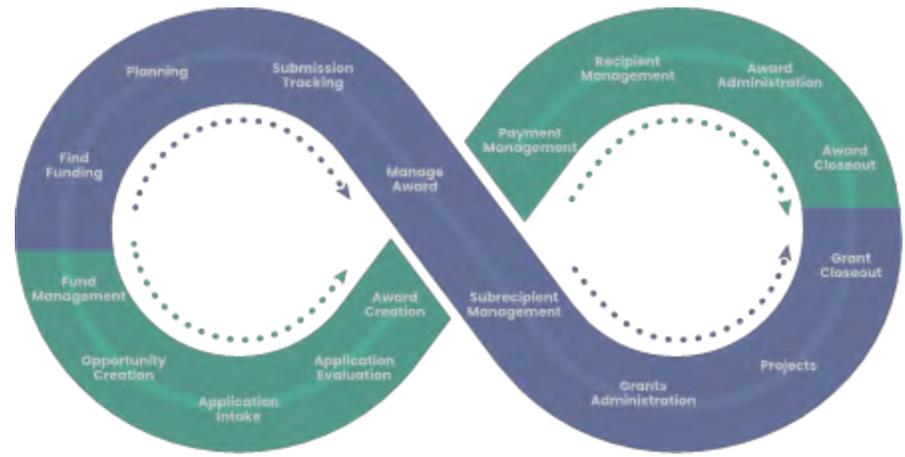
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# Features to drive outcomes

**Workflow**

- Power business processes
- Improve automation, communication & collaboration

**Custom Forms**

- Gather data about grants or grant processes
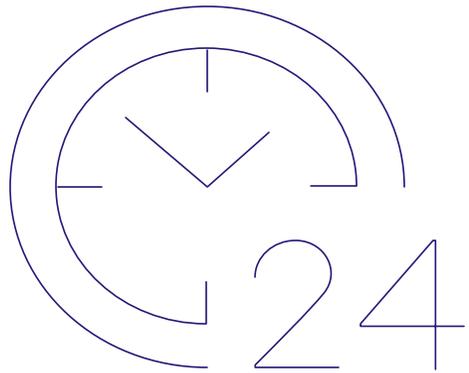- Analytics to support reporting and compliance



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# Compliance is crucial and expectations are fluid

- Scrutiny on grant performance is increasing

- Outcomes based decisions & funding are growing

- Inefficiencies or ineffective processes drive higher risk in maintaining & gaining funding



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# Efficiency drives stability through turnover and transition

- Staff changes and loss of institutional knowledge plagues day-to-day tasks

- Communication across teams/departments/groups can be burdensome

- Priorities are shifting quickly with the changing landscape

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# Business Process Success with Workflow

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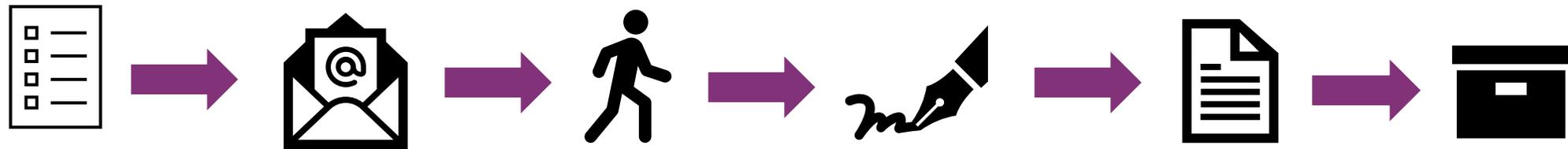# Chaos to Clarity: Standardizing Processes with Workflow
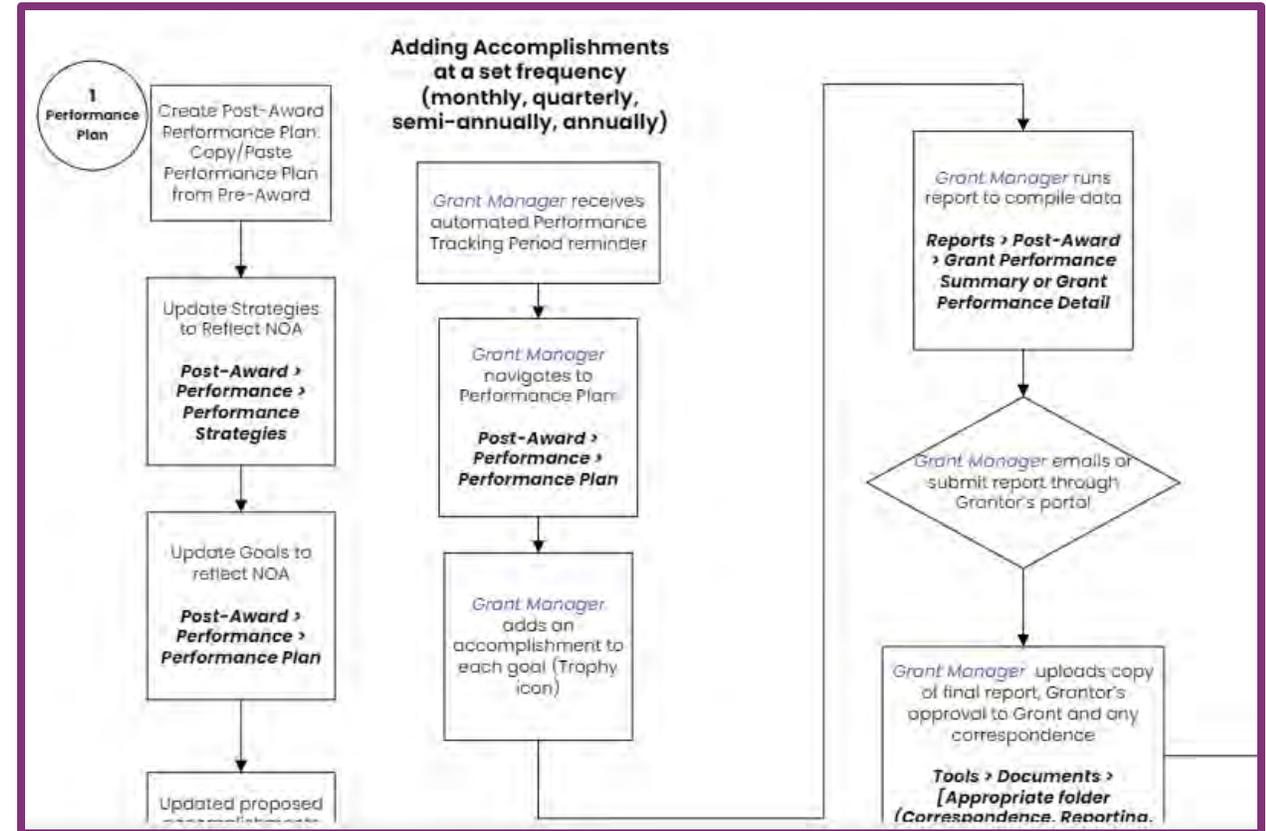
What it looks like now



Or

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# How to get started

1. What is the problem you are trying to solve?

2. What are the steps?

3. Who is involved?

4. How does it happen?

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# Example Use Case: Pre-Award Review

*Standardized process for departments to obtain approval to apply for a grant*

**What challenges do you face in completing and monitoring pre-award processes?**



Pre-Award Approval Workflow

Workflow Queues

Add Workflow Queue ✚

▾ Initial Approval 🏴 ✚ ✏ 🗑
  ❮ ◌ Review Opportunity ✏ 🗑
  ❮ ❯ Approved: Will Send to Budget Development Stage ✏ 🗑
  ❮ ❯ Not Approved, Remove from workflow ✏ 🗑

▾ Budget Development ✚ ✏ 🗑
  ❮ Create Pre-Award Budget ✏ 🗑
  ❮ ❯ Approved: Send to Preparation of Supporting Documents ✏ 🗑
  ❮ ❯ Declined: Send Back to Approval Stage ✏ 🗑
  ❮ ❯ Remove from Workflow ✏ 🗑

▾ Preparation of Supporting Documents ✚ ✏ 🗑
  ❮ ◌ Prepare Supporting Documentation and Upload for Final Review ✏ 🗑
  ❮ ❯ Approved: Send to Final Review ✏ 🗑
  ❮ ❯ Declined: Send Back to Budget Development ✏ 🗑
  ❮ ❯ Declined: Send Back to Approval Stage ✏ 🗑
  ❮ ❯ Remove from Workflow ✏ 🗑

▾ Final Approval ✚ ✏ 🗑
  ❮ ◌ Remove from Workflow ✏ 🗑
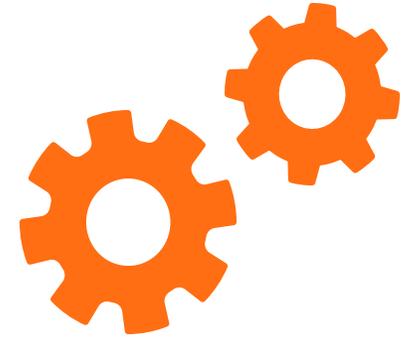
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# Example Use Case: Payment Request Review / Approval

*Compliance driven multi-level review and approval*

**What challenges do you face in completing and monitoring post-award processes?**

## Economic Development Award Reimbursement Approvals - Actions

| Name | | Routes From | Routes To | Automation | Records Enrolled | Default Assignees |
|---|---|---|---|---|---|---|
| ▶ Program Review | ✏ ⊘ ⌄ | | Fiscal Review | | 0 | Additional Users, Department Members, Funder Grant Manager, Manager, Allison Wells, Andrew Brooks, Andrew Brooks, Nate Howell, Zack Prater |
| Fiscal Review | ✏ 🗑 ⊘ ⌄ | Program Review | Compliance Review | | 0 | Funder Grant Manager, Manager, Allison Wells, Andrew Brooks, Nate Howell, Zack Prater |
| Compliance Review | ✏ 🗑 ⊘ ⌄ | Fiscal Review | Final Authorization, Reimbursement Rejection | | 1 | Manager, Andrew Brooks, Eliza Schuyler, Jennifer Grevis, Julia Hart |
| Final Authorization | ✏ 🗑 ⊘ ⌄ | Compliance Review | Payment Processing | Status Change | 0 | Funder Grant Manager, Manager, Jennifer Grevis |
| Reimbursement Rejection | ✏ 🗑 ⊘ ⌄ | Compliance Review | | Status Change | 0 | Funder Grant Manager, Manager, Andrew Brooks |
| Payment Processing | ✏ 🗑 ⊘ ⌄ | Final Authorization | | | 1 | Funder Grant Manager, Manager, Allison Wells, Andrew Brooks, Jennifer Grevis, Zack Prater |

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# New Workflow Features

- Dynamic routing

- Assignments based on role/department

- New objects (payment requests, amendments and more to come!)

- Approval automation

- Streamlined configuration

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# Workflow Outcome: Detailed Activity Tracking for Compliance

## Homeless Shelter Capital Needs – Workflow History

Drag a column header and drop it here to group by that column

| Workflow Queue | Workflow Action | Text | User | Created Date |
|---|---|---|---|---|
| Budget Development | Approved: Send to Preparation of Supporting Documents | 'Homeless Shelter Capital Needs' (38584) - Sent to Queue 'Preparation of Supporting Documents ' (4195) | zprater@streamlinksoftware.com | 7/7/2025 3:16 PM |
| Initial Approval | Approved: Will Send to Budget Development Stage | 'Homeless Shelter Capital Needs' (38584) - Sent to Queue 'Budget Development' (4194) | zprater@streamlinksoftware.com | 7/7/2025 3:12 PM |
| Initial Approval | Exit Workflow | 'Homeless Shelter Capital Needs' (38584) - Added to Workflow Instance 'Pre-Award Approval Workflow ' (775) | zprater@streamlinksoftware.com | 7/7/2025 3:12 PM |
| Initial Approval | Exit Workflow | 'Homeless Shelter Capital Needs' (38584) - Exited Workflow Instance 'Pre-Award Approval Workflow ' (775) | zprater@streamlinksoftware.com | 7/7/2025 3:11 PM |
| Initial Approval | Exit Workflow | 'Homeless Shelter Capital Needs' (38584) - Added to Workflow Instance 'Pre-Award Approval Workflow ' (775) | zprater@streamlinksoftware.com | 7/7/2025 3:10 PM |

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# Workflow Outcome: Automated Routing & Notifications



**Update Workflow for Selected Payment Requests**

You will update the workflow for all 1 selected payment requests

Enroll in Workflow: Economic Development Award Reimbursement Approvals

Workflow Action: Program Review

## Assignees

Assignees: Allison Wells, Andrew Brooks, Andrew Brooks, Nate Howell, Zack Prater, Additional Users, Department Members, Funder Grant Manager

## Notifications

Notify Users: Andrew Brooks, Margaret Lihs

Enroll   Cancel

# Workflow Outcome: Streamlined Action List

| Name | Current Queue |
|---|---|
| Drag a column header and drop it here to group by that column | |
| State Office of Research Administration Grant (FY22 - FY23) | Approval |
| State Office of Research Administration Grant (FY23-FY24) | Amendment Approval Workflow Initial Queue |
| Rural Health Research Center Program | Initial Approval |
| Public Infrastructure Grant Program | State Agency Initial Validation Queue |
| Tribal Public Health Capacity Building and Quality Improvement Umbrella Cooperative Agreement | Budget Development |
| Native American Library Services Basic Grant | Preparation of Supporting Documents |
| Community Development Block Grant - General Infrastructure | Initial Approval |
| Population Assessment of Tobacco and Health (PATH) Study Biospecimen Access (X01) | Initial Approval |
| Contract to Purchase and Provide Services with Foster & Adoptive Care Coalition | Approval |

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# Workflow Outcome: Reporting

## Workflow Actions Sorted by Grants

### Alcohol Impaired Driving Program

| WorkflowQueue | WorkflowAction | Individual | RecordCreatedDateUtc |
|---|---|---|---|
| Initial Approval | Exit Workflow | Zack Prater | 05/05/2025 |
| Initial Approval | Approved: Will Send to Budget Development Stage | Zack Prater | 05/05/2025 |
| Budget Development | Declined: Send Back to Approval Stage | Zack Prater | 05/05/2025 |
| Initial Approval | Exit Workflow | Zack Prater | 05/05/2025 |
| Post-Award Payment Request Approval | Exit Workflow | Zack Prater | 05/05/2025 |
| Post-Award Payment Request Approval | Upload Signed Approval From from Mayor | Michael Synk | 05/05/2025 |

### Bureau of Indian Affairs - Indian Highway Safety Law Enforcement Grants

| WorkflowQueue | WorkflowAction | Individual | RecordCreatedDateUtc |
|---|---|---|---|
| Initial Approval | Add to Workflow | Michael Synk | 02/14/2023 |
| Initial Approval | Exit Workflow | Mike Synk | 02/16/2023 |
| Pre-Award Grant Services Approval Initial Queue | Add to Workflow | Mike Synk | 02/16/2023 |
| Pre-Award Grant Services Approval Initial Queue | Build Pre-Award Budget | Mike Synk | 02/16/2023 |
| Pre-Award Grant Services Approval Initial Queue | Upload Pre-Award Approval Form | Mike Synk | 02/16/2023 |
| Pre-Award Grant Services Approval Initial Queue | Build-Out Submission Performance Plan | Michael Synk | 11/15/2023 |
| Pre-Award Grant Services Approval Initial Queue | Build Pre-Award Budget | Michael Synk | 11/15/2023 |
| Pre-Award Grant Services Approval Initial Queue | Upload Pre-Award Approval Form | Michael Synk | 11/15/2023 |
| Pre-Award Grant Services Approval Initial Queue | Exit Workflow | Michael Synk | 11/15/2023 |

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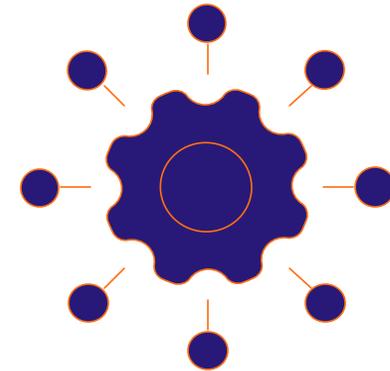# Analytics Success
# with Custom Forms

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# Collaborate efficiently

- "Standardize" data collection
- Enable reporting
- Bring it all to the same "table"

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# Establish a plan for reporting

1. What data do you need & when?

2. Where can you find it?

3. What controls can you put in place?

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# Example Use Case: Application Checklist

*Standardized process for ensuring requirements are met*

How do you track grant "checklists" throughout the grant lifecycle?

# Example Use Case: Risk Assessment Form

*Consistency in compliance driven review*

# Example Use Case: Tracking Assets

*Organized retention of data*

What challenges do you face in gathering data for grant outcomes or inputs?

Form Builder

## Asset Managment Form

### General Information

Vehicle Make*

Model

Year Made

Purchase Year

Mileage at Time of Purchase

Related Program or Activity ( Ex. 5303, 5304, etc.)

ALI ( Activity Line Item or GL Code)

Date Info Entered

### Vehicle Usage Info

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# Outcomes with Custom Forms

- Standardized data collection

- Data synchronization with external systems

- Simplified reporting



| Asphalt | | | | | | ▲ |
|---|---|---|---|---|---|---|
| Road ID | Name | Type | Speed Limit | Length Mi. | Lanes | Direction |
| 1001 | I-90 | Highway | 70 mph | 302.5 | 4 | Both |
| 1003 | State Route 50 | State Rd | 55 mph | 57.8 | 2 | Both |
| 1004 | Elm Ave | Local | 25 mph | 1.2 | 2 | One-Way |
| 1005 | US Route 66 | US Hwy | 65 mph | 237.6 | 2 | Both |
| Count 4 | Count 4 | Count 4 | Max 70 mph | Count 4 | Count 4 | Count 4 |

| Concrete | | | | | | ▲ |
|---|---|---|---|---|---|---|
| Road ID | Name | Type | Speed Limit | Length Mi. | Lanes | Direction |
| 1002 | Main St | Local | 35 mph | 2.3 | 2 | Both |
| Count 1 | Count 1 | Count 1 | Max 35 mph | Count 1 | Count 1 | Count 1 |

**Report Totals**

| Count 5 | Count 5 | Count 5 | Max 70 mph | Count 5 | Count 5 | Count 5 |
|---|---|---|---|---|---|---|

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# Efficiency Means…

- Less scramble for compliance

- Staff have more time for real impact

- Simplified hand-offs

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# Thank you!

Let's reach for the stars!