CARDIFF

Case Study

Iowa State University

Iowa State University streamlines the grant application process with Cardiff LiquidOffice. There's now less time chasing approvals and more time writing competitive proposals.

Like most academic institutions, grants are vital to the financial health of Iowa State University (ISU). Not only does grant money help keep tuition costs down, grants and other funded programs are important to the research, education and outreach missions of a university. Handling the administration of these grants in an accurate, timely and professional way is therefore of paramount importance.

At ISU, the Office of Sponsored Programs Administration (OSPA) is tasked with the crucial job of managing the external grant application process. It oversees approximately 2,000 grant applications each year, which bring in more than $225 million annually.

The Challenge

The grant application process at ISU is driven by an institutional proposal data form. This two-page form collects pertinent information about the proposed project, such as name of principal investigator and funding amount, and gathers approvals from the departments who bear institutional responsibility for complying with the conditions of a grant.

Traditionally, ISU faculty and staff entered information pertaining to the proposal data form into designated computers linked to an Oracle database, after which they printed the Oracle-based proprietary form. They hand-carried the form and proposal package around campus for approvals. Since the forms require from four to 20 signatures, this process takes from two hours to several days to complete. "Add the harsh Iowa weather to the fact that our campus is spread across acres and acres of land, and you've got a high frustration level," said Thane Peterson, OSPA Director. "But, more important, getting approvals on foot was wasting thousands of faculty and staff hours every year and slowing down the grant submission process, which often have short time-frames."

The Solution

Through interactions with ISU faculty and staff, OSPA determined that an electronic, Web-based internal proposal data form was the single most important process improvement it could implement. Streamlining the grant application approval process would increase the time that could be spent on developing more competitive proposals.

Working with Cardiff software, the leading provider of adaptive business process management solutions, and Binary Office, a leading eForms systems integrator, OSPA began the task of automating their grant application approval process.

"Cardiff offered the only open-standards solution that would faithfully mirror our paper process, both visually and mentally," Peterson said. "We selected them because their solution was flexible, did not involve hardware or software investments at the department level, and would require little training of faculty and staff."

Under the new process, ISU will use Cardiff's® LiquidOffice™ solution to create an intelligent, electronic PDF internal proposal data form. LiquidOffice is a complete XML-based business process management software system allowing universities and other organizations to design, route, approve and sign online electronic forms.

Customer at a Glance
Iowa State University
Industry: Education
Application: Proposal Data eForms
Challenge: Streamline processes, improve customer service, minimize expenses and training
Solution: Cardiff LiquidOffice
Partner: Binary Office
Results: • Process nearly 2,000 grant proposals per year from 1,200 investigators • Reduce internal grant approval process • ROI expected in 1.5 to 2 years based on a savings of 2 hours of faculty time per application • Improve customer service to faculty and staff

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—Thane Peterson, Iowa State University

All ISU faculty and staff involved in externally sponsored projects will access and complete the new proposal data form online through a Web browser. After attaching supporting proposal documents electronically, they will route the complete packet around campus for signatures without ever leaving their offices.

The Benefits of Cardiff

Binary Office embedded business rules onto the form that trigger special routing when certain boxes on the form are checked, for example a specific university department. The form also features signature fields that include a name, date, and time-stamp. To ensure security, the approver must enter a valid user ID and password to complete the authorization.

"We were also able to customize the form with the Iowa State colors and logo, so that it has the unique feel of the University," Peterson added.

ISU is presently migrating to a SQL server database, which will automatically capture data from the proposal data form. The entire university uses the data collected by the form to make strategic decisions, which adds significant value to the new business process. By implementing a 'self-routing' electronic internal proposal data form linked to an SQL database, ISU's OSPA will be able to automate database crosschecks, obtain compliance verification from the appropriate compliance committees, instantly provide the current status of the internal approval of a grant application submission, and automate information alerts to other pertinent departments.

Peterson explained, "When we get a phone call from a faculty member requesting that we file an extension or modification of the original proposal, we have to track down a lot of information before we can start the work. Once we're in full production, this will all be automated. The faculty member will simply bring up a request form off our Web site and enter the grant application ID number. All the required information to file the extension will automatically be populated from the database."

But Peterson believes that one of the most important benefits will be anytime, anywhere access. "Faculty will now be able to submit proposal data forms while traveling or from home at night and on the weekends. LiquidOffice has enabled us to become a 24x7 operation and will introduce a new level of customer service and efficiency to our grant approval process."

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