An international institution fights AIDS, tuberculosis and malaria

IBM Blueworks Live and IBM Business Process Manager technology help fund lifesaving programs

Overview

The need

Wasting time with disjointed, poorly documented grant evaluation processes, the institution wanted to put in place a new strategy that would enable it to more quickly identify successful projects.

The solution

The organization deployed IBM® Blueworks Live™ and IBM Business Process Manager software to map out its existing policies and develop automated workflows to oversee evaluation efforts.

The benefit

The streamlined process provides key decision makers with uniform access to relevant information and reduces processing and workflow delays, helping to save lives the world over.

A world free of burden from infectious and virulent diseases is a laudable goal, and each day, one international financing institution strives to make that dream a reality. In its first decade of operation, the institution has provided AIDS treatment and anti-tuberculosis treatment to millions of individuals, and provided millions of insecticide-treated nets to malaria-plagued regions. The institution pursues a unique partnership strategy to fight disease by collaborating with governments, civil societies, private-sector business and affected communities to put in place unique disease-fighting programs based on local needs. Each year, the organization distributes roughly USD4 billion; however, to qualify for funding, these programs must be results-driven and able to offer direct evidence of success.

Plagued with inefficiencies and delays

With each check written to fight disease, the institution holds a responsibility to protect those investment dollars and validate that they are being used effectively. Each penny spent on a failed initiative is a penny that could have been used to save a larger number of lives in a more productive program. As a result, the institution has developed comprehensive evaluation and assessment processes that take place over the life of an entire funded program.

Although its evaluation efforts were thorough and rigorous, the process proved to be time-consuming. Grant application and fund disbursement processes hinged on several manual steps, with relevant information housed in multiple systems and even random spreadsheets. This high degree of human interaction for each step resulted in long waiting times, with the worst cases requiring a full year between application submission and grant payment.

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—An International financing institution

"We need to be certain that the programs that we are funding are having a positive impact year after year," explains a staff member at the institution. "But applying that rigor to all of the applications we received took a great deal of time. We found our responsibility to donors conflicting with our desire to save as many lives as possible, and we needed to change that."

The cause for this delay was not a deluge of excessive requests to process; on average, the organization received approximately 200 applications each year and supported only a few thousand ongoing programs at any given time. Instead, the duplicated work and time spent gathering relevant information proved to be the issue.

Defining a treatment

With its focus on helping to fight disease, the institution wanted to put in place a new process workflow that would automate and simplify operations, allowing the organization to make better use of its time. It needed a fluid new workflow because evaluation processes changed frequently and varied depending on the types of programs being proposed and the geographies supported.

As a first step, the institution decided to overhaul its most problematic and time-consuming operations: its "phase 2 review" processes. These processes focused on the ongoing oversight and assessment of funded programs after they had reached their third year. The institution evaluated numerous available tools, ultimately choosing IBM® Blueworks Live™ technology to map out the individual steps that drove its phase 2 review processes.

After a series of iterations in which all the process stakeholders took advantage of the collaboration features built into the Blueworks Live solution, the firm had a clearly defined workflow that was ready for automation. The group used IBM Business Process Manager software to automate several of the manual steps identified as bottlenecks during the analysis phases. The IBM Business Process Manager application also improved the visibility into key process performance indicators, thus giving key decision makers further opportunities to streamline the granting process.

Focusing on what matters

Automating and streamlining its phase 2 review efforts greatly affected the institution's review and payment operations. Those responsible for approving ongoing funding can now find relevant information more quickly and make decisions that better align with the organization's philosophy. In turn, the group can more quickly and effectively fund successful disease prevention and treatment projects.

The staff member adds, "It's amazing how easily we can find all of the relevant records for a grant application. We have everything we need to make judgments more quickly, so we can get checks out the door that much faster. And the sooner we can fund successful programs, the more lives we can help save."

Enjoying a positive prognosis

Pleased with the results, the institution intends to expand the scope of its automation and standardization project to include fund distribution efforts as well as the entire grant application review process.

The IBM tools will further help with back end, technical tasks. The ease of use of the Blueworks Live technology will help office staff to more effectively communicate with the organization's IT department. With an open dialogue, those who evaluate grant applications can more easily document system requests, helping IT staff to design an automated workflow that better aligns with the shifting requirements of the evaluation process.

Altogether, the institution expects its new process mapping and standardization policies to drive efficiencies and allow it to focus on what is important—identifying health projects that will help save lives.

For more information

To learn more about IBM Blueworks Live software, please contact your IBM marketing representative or IBM Business Partner, or visit the following website: **ibm.com**/software/integration/blueworks-live

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