Introduction to Managing Grants and Setting Yourself Up For Success

Thank you for joining us!

The Community of Learning will begin momentarily…

Please use the chat box to share your name, Tribe, organization, and where you are from.
The Community of Learning (COL) is Now Live
Housekeeping

• Have questions? Just ask!
• Community of Learning Features
  • Polling
  • Chat box
  • Q and A
  • Raise Hand
• Hold Music

*products or services mentioned in this presentation are not endorsed by NCUIH
House Keeping

Today's Audio

Please connect to audio via phone OR computer-not both.

Conference Number: 1877-394-5901 Access Code: 2743401

If you dialed-in you will need to turn off your computer speaker or you will hear an echo.
How to Ask a Question During the Community of Learning

In order to ask the presenter(s) a question during the community of learning, simply enter your question into the Q & A box at the bottom of the pod and click the button to the right.

*products or services mentioned in this presentation are not endorsed by NCUIH
Our Mission

NCUIH is a national membership non-profit organization devoted to the support and development of quality, accessible, and culturally-competent healthcare services for American Indians and Alaska Natives living in urban settings.
Welcome to our Community of Learning

Thank you for joining us!

Today’s Community of Learning will be led by…

Jamie Ishcomer-Aazami, MPH, MSW (Choctaw Nation of Oklahoma)
Deputy Director
National Council of Urban Indian Health
Introduction to Managing Grants and Setting Yourself Up For Success

Jamie Ishcomer-Aazami, MPH, MSW (Choctaw Nation of Oklahoma)
Deputy Director
National Council of Urban Indian Health
Topics to be Covered

• Importance of preparation: planning, implementation and evaluation
• Dividing roles and responsibility
• Accountability to each other and funders
• Project management tools and resources
Disclaimer & Refresher

• While this presentation will provide information to support the development of an application, the focus will be on managing a grant after you have received it.

• This presentation was developed to support SMART objectives
  • Specific
  • Measureable
  • Achievable
  • Realistic
  • Time-Bound
Who is Jamie Ishcomer-Aazmi and why is she presenting this information?
What do you dread MOST about project management?
Project Management Pitfalls

1. Poor communication
2. Lack of trust and delegation
3. Unclear roles, responsibilities and deliverables
4. A poorly created project plan
5. Lack of breaking down projects into smaller tasks
6. Weak resource management
7. No attention to people management
8. Inappropriate risk management
9. Faked or unrealistic deadlines
10. Inefficient project management tools

Importance of Preparation: Planning, Implementation and Evaluation

Considerations for your grant application
Activities

• Activity 1: Finalize work plan, deadlines and budget with funder by month 1.
  • Deliverable: Finalized and agreed upon work plan with deadlines and budget

• Activity <last>: Ensure ongoing compliance with funder.
  • Monthly check in calls
  • Progress reports submitted
  • Annual reports submitted
PIE

• PIE for all (activities)!
  • Planning
  • Implementation
  • Evaluation
    • Performance Measures

• Consider barriers or challenges you may encounter at each point
  • External stakeholder involvement
  • Summer and holiday vacation periods
  • Data sources for evaluation and performance indicators

A poorly created project plan (4)
Lack of breaking down projects into smaller tasks (5)
Weak resource management (6)
Inappropriate risk management (8)
Faked or unrealistic deadlines (9)
Inefficient project management tools (10)
Timelines

• Work backwards
  • Evaluation
  • Implementation
  • Planning

• Consider barriers or challenges you may encounter at each point
  • External stakeholder involvement
  • Summer and holiday vacation periods

A poorly created project plan (4)
Lack of breaking down projects into smaller tasks (5)
Weak resource management (6)
Inappropriate risk management (8)
Faked or unrealistic deadlines (9)
Inefficient project management tools (10)
Putting it Together

• Activity 1: Finalize work plan, deadlines and budget with funder by month 1  
  Remember to develop your timeline by working backwards!
  • Planning: Schedule call 1 with funder to finalize work plan, deadlines, and budget by week 2
    • Identify who all needs to be on the call (email address/contact information) by week 1
    • Send doodle poll to identify availability by week 1
    • Send calendar invite to all participants once meeting time has been established by week 2
    • Develop agenda for call 1 by week 2
  • Implementation: Send final and agreed upon work plan to funder by end of month 1
    • Facilitate call with funder to finalize work plan, deadlines, and budget by week 3
    • Update work plan and send to funder by week 4 (end of month 1)
  • Evaluation: N/A
  • Output: 1 finalized and agreed upon work plan

Potential Barriers
Unknown contact information, delayed doodle poll response, no time that works for everyone, etc.
Evaluation and Performance Measurement

How you know you’re being successful (aka ACCOUNTABLE to your organization, funders and other stakeholders)

• Types of evaluation
  • Process
  • Outcome

• Measures
  • Indicators
  • Data sources
A best practice I use in my grant writing to better support planning, implementation, and evaluation of deliverables is....
Dividing Responsibility
Poll

How satisfied are you with how work is currently divided among your team? On a scale of 1 – 5: 1-being ‘not satisfied at all’ and 5-being ‘extremely satisfied’
Roles and Responsibilities: MOCHA

- **Manager**: Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off-track.

- **Owner**: Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or with helpers) and that others are involved appropriately. There should only be one owner.

- **Consulted**: Should be asked for input or needs to be bought in to the project.

- **Helper**: Assists with or does some of the work.

- **Approver**: Signs off on decisions before they’re final. May be the manager, though might also be the executive director, external partner, or board chair.

[http://www.managementcenter.org/resources/assigning-responsibilities/](http://www.managementcenter.org/resources/assigning-responsibilities/)
## MOCHA example

<table>
<thead>
<tr>
<th>Manager</th>
<th>Owner</th>
<th>Consulted</th>
<th>Helper</th>
<th>Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigns responsibility and holds owner accountable</td>
<td>Has overall responsibility for the success or failure of the project.</td>
<td>Should be asked for input or needs to be bought in to the project.</td>
<td>Assists with or does some of the work.</td>
<td>Signs off on decisions before they’re final.</td>
</tr>
</tbody>
</table>

- **Department Director**
- **Program Manager**
- **Team members**
- **Board of directors**
- **Community members**
- **Coordinator (logistics, travel)**
- **Communications**
- **Executive Director**

---

**Poor communication (1)**

- **Lack of trust and delegation (2)**
- **Unclear roles, responsibilities, and deliverables (3)**
- **No attention to people management (7)**
- **Inefficient project management tools (10)**

---

Keep this in mind when developing your work plan! Applications often ask who will be responsible for each activity.
I have utilized the MOCHA technique to divide responsibility amongst my project teams.

A) Yes
B) No
C) No, but something similar
Every deliverable needs a

• Deliverable 1
  • Planning
    • MOCHA
  • Implementation
    • MOCHA
  • Evaluation
    • MOCHA
• Deliverable 2
  • Planning
    • MOCHA
  • Implementation
    • MOCHA
  • Evaluation
    • MOCHA

Poor communication (1)
Lack of trust and delegation (2)
Unclear roles, responsibilities, and deliverables (3)
Lack of breaking down projects into smaller tasks (5)
No attention to people management (7)
Inefficient project management tools (10)
# Putting it Together

## Activity 1: Finalize work plan, deadlines and budget with funder by month 1

<table>
<thead>
<tr>
<th>Stage</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine MOCHA for deliverable</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>Identity who all needs to be on the call</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Manager</td>
</tr>
<tr>
<td>Send doodle poll to identify availability</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Helper</td>
</tr>
<tr>
<td>Develop agenda for call 1</td>
<td></td>
<td>Deadline</td>
<td></td>
<td></td>
<td>Helper</td>
</tr>
<tr>
<td>Send calendar invite with agenda to all participants</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Manager</td>
</tr>
<tr>
<td><strong>Implementation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilitate call with funder to finalize work plan, deadlines, and budget</td>
<td></td>
<td></td>
<td>Deadline</td>
<td></td>
<td>Manager</td>
</tr>
<tr>
<td>Update work plan and send to funder for final approval</td>
<td></td>
<td></td>
<td>Deadline</td>
<td></td>
<td>Manager</td>
</tr>
<tr>
<td><strong>Evaluation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Poll

What are your best practices for dividing responsibility?
Accountability to each other and funders
Poll

The biggest challenge I face with internal accountability is....
Internal Accountability

• Manage expectations from the start
  • Roles and responsibilities for each deliverable
    • PIE
    • MOCHA
  • Clear understanding of success
    • Performance and evaluation plan

• Productive project meetings
• Project management tools/software (more to come!)
• Celebrate the small successes!

Poor communication (1)
Lack of trust and delegation (2)
Unclear roles, responsibilities and deliverables (3)
Lack of breaking down projects into smaller tasks (5)
Weak resource management (6)
No attention to people management (7)
Inappropriate risk management (8)
Inefficient project management tools (10)
Productive Meetings

- Meeting Agenda or POP (purpose, outcomes, process)
  - Updates
  - Challenges
  - Questions
- MOCHA
  - Pre meeting
    - Scheduling and logistics
  - During meetings
    - Facilitator
    - Note taker
  - Post meeting
    - Action items
    - Disseminate meeting minutes
External Accountability to Funders

- Manage expectations from the start
  - Activities in application
    - Remember PIE!
    - Clear understanding of success
      - Performance and evaluation plan
  - First meeting
    - Roles of funders and staff
    - What to do when adjustments/changes need to be made to the work plan
- Ensure productive meetings
- Submit deliverables and grant documents on time!!

Poor communication (1)
Lack of trust and delegation (2)
Unclear roles, responsibilities and deliverables (3)
No attention to people management (7)
Inappropriate risk management (8)
Inefficient project management tools (10)

Activity 1: Finalize work plan, deadlines and budget with funder by month 1.

Activity <last>: Ensure ongoing compliance with funder.
  - Monthly check in calls (going)
  - Progress reports submitted (months 6, 18)
  - Annual reports submitted (months 11, 23)
External Accountability to Stakeholders

- Consider external stakeholders during PIE phases
- Manage expectations of involved stakeholders
  - Workgroup members
  - Board members
  - Participants in data collection efforts
  - Measures of success
- Ensure productive meetings
- Disseminate your work!
Poll

I use an agenda or a POP for....(select all that apply)
A) Internal meetings
B) External meetings with funders
C) External meetings with stakeholders
D) Never
E) Never but I’m going to start now!
Project Management Tools & Resources
Recap

- PIE – Planning, Implementation, Evaluation
- Gantt Charts
- MOCHA
- Meeting Agendas / POP
# Project Management Software

## TechnologyAdvice Project Management Software Buyer's Guide

*Updated: Feb. 4th, 2020*

<table>
<thead>
<tr>
<th>Product</th>
<th>TA Rating</th>
<th>Budget Tracking</th>
<th>Resource Management</th>
<th>Email Integration</th>
<th>Gantt Chart View</th>
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</thead>
<tbody>
<tr>
<td>LiquidPlanner</td>
<td>4.5/5</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Trello</td>
<td>4.36/5</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Wrike</td>
<td>4.34/5</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Asana</td>
<td>4.21/5</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>JIRA</td>
<td>4.2/5</td>
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<td>✗</td>
<td>✓</td>
<td>✗</td>
</tr>
</tbody>
</table>

*Inefficient project management tools (10)*

[https://technologyadvice.com/project-management/](https://technologyadvice.com/project-management/)
Asana

Inefficient project management tools (10)
## Excel Spreadsheet

<table>
<thead>
<tr>
<th>Activity 1: Finalize work plan, deadlines and budget with funder by month 1</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Responsible</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine MOCHA for deliverable</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Owner</td>
<td>COMPLETE</td>
<td></td>
</tr>
<tr>
<td>Identity who all needs to be on the call</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Manager</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td>Send doodle poll to identify availability</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Helper</td>
<td>Delayed</td>
<td>2/1/2020 Missing contact information delayed.</td>
</tr>
<tr>
<td>Develop agenda for call 1</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Helper</td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td>Send calendar invite with agenda to all participants</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Manager</td>
<td>Delayed</td>
<td>Missing contact info delayed.</td>
</tr>
<tr>
<td><strong>Implementation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilitate call with funder to finalize work plan, deadlines, and budget</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Manager</td>
<td>Not started</td>
<td></td>
</tr>
<tr>
<td>Update work plan and send to funder for final approval</td>
<td>Deadline</td>
<td></td>
<td></td>
<td></td>
<td>Manager</td>
<td>Not started</td>
<td></td>
</tr>
<tr>
<td><strong>Evaluation</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>
Fancier Excel Spreadsheet

• Drop downs
  • Project status
  • Responsible staff / team

• Conditional formatting
  • Project status delayed: box turns red
  • Tasks marked complete, strike out box
  • Endless opportunities!

https://www.vertex42.com/ExcelTemplates/excel-project-management.html
Creating drop down boxes

1. Highlight column/row you want to apply the drop down option to
2. Data Tab → Data Validation
   1. Settings
      1. List
         1. Select Source
         2. Type in
         2. Select list in excel
## Prioritization Matrix

<table>
<thead>
<tr>
<th>Important</th>
<th>Urgent</th>
<th>Not Urgent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I</td>
<td>II</td>
</tr>
<tr>
<td>(MANAGE)</td>
<td></td>
<td>(FOCUS)</td>
</tr>
<tr>
<td>- Crisis</td>
<td></td>
<td>- Preparation/planning</td>
</tr>
<tr>
<td>- Medical emergencies</td>
<td></td>
<td>- Prevention</td>
</tr>
<tr>
<td>- Pressing problems</td>
<td></td>
<td>- Values clarification</td>
</tr>
<tr>
<td>- Deadline-driven projects</td>
<td></td>
<td>- Exercise</td>
</tr>
<tr>
<td>- Last-minute preparations for scheduled activities</td>
<td></td>
<td>- Relationship-building</td>
</tr>
<tr>
<td>- True recreation/relaxation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Quadrant of Necessity

### Quadrant of Quality & Personal Leadership

<table>
<thead>
<tr>
<th>Not Important</th>
<th>III</th>
<th>IV</th>
</tr>
</thead>
<tbody>
<tr>
<td>(AVOID)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Interruptions, some calls</td>
<td></td>
<td>- Trivia, busywork</td>
</tr>
<tr>
<td>- Some mail &amp; reports</td>
<td></td>
<td>- Junk mail</td>
</tr>
<tr>
<td>- Some meetings</td>
<td></td>
<td>- Some phone messages/email</td>
</tr>
<tr>
<td>- Many “pressing” matters</td>
<td></td>
<td>- Time wasters</td>
</tr>
<tr>
<td>- Many popular activities</td>
<td></td>
<td>- Escape activities</td>
</tr>
<tr>
<td>- Viewing mindless TV shows</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Quadrant of Deception

### Quadrant of Waste
Project Management Tools

1. Do your research
2. Find one that will work best for you and your team
   1. Budget
   2. Features
   3. Training availability
3. Invest time in learning the system
4. Invest time in setting up the system and training staff to utilize it
Poll

I have a greater understanding of the pitfalls of project management and how to overcome them.
A) Yes
B) No
The presentation provided information on the following (check all that apply)

a) Importance of preparation: planning, implementation and evaluation
b) Dividing roles and responsibility
c) Accountability to each other and funders
d) Project management tools and resources
Yakoke! Thank you!

Jamie Ishcomer-Aazami, MPH, MSW (Choctaw Nation of Oklahoma)
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National Council of Urban Indian Health
jishcomer@ncuih.org
Next BH GR Community of Learning Session 3
https://www.surveymonkey.com/r/Q7LNB2G

National Council of Urban Indian Health
COMMUNITY OF LEARNING
GRANT WRITING SERIES

Session 3: Introduction to Fiscally Managing Grants

TOPICS
• Developing financial reports for multiple stakeholders
• How to capture time between programs or funds for your employees
• How to manage cash flow intentionally

MARCH 5, 2020
2 - 4 PM ET

Luis Cervantes, MBA
Founder & President
On Point Fiscal Solutions (OPFS)

REGISTER
NCUIH.ORG/GRANTWRITINGSERIES
Thank you!!

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