



GPA Webinar

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Do It Yourself Project Management Tools for Grant Professionals

*Presented by,
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Agenda

- Introductions
- Session objectives
- Project Management overview and research
- Deep dive into the toolkit and applied use
 - Project charter
 - Project management plan
 - Stakeholder analysis
 - Risk register
- Resources and Tools
- Questions and Answers

About the Presenter

- Rachel Werner is CEO and Owner, RBW Strategy, LLC
- Based in Washington, DC metro area
- Over 14 years of grant lifecycle support and project management experience with government, nonprofit and corporate entities
- Grants Management Certificate (2012), Certified Grants Professional (2014), and Certified Project Management Professional (2010)

Session Objectives

- **Objective 1:** Learn the in's and out's of project management
- **Objective 2:** Find out how project management can benefit your work
- **Objective 3:** Use case studies to apply project management into the grants context

Project Management Overview

What is the Project Management Framework?

Assumption – Project Management is guided by a series of steps and process. Follow these and you will achieve success.



Project Management Overview

Knowledge Areas	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring & Control	Closing
Integration	Develop Project Charter	Develop Project Mgt Plan	Direct & Manage Project Work	Monitor & Control Project Work Integrated Change Control	Close Project or Phase
Scope		Plan Scope Management Collect Requirements Define Scope Create WBS		Validate Scope Control Scope	
Time		Plan Schedule Define Activities Sequence Activities Estimate Activity Resources Estimate Activity Durations Develop Schedule		Control Schedule	
Cost		Plan Cost Management Estimate Costs Determine Budget		Control Costs	
Quality		Plan Quality Management	Perform Quality Assurance	Control Quality	
Human Resources		Plan HR Management	Acquire Project team Develop Project Team Manage Project Team		
Communication		Plan Communications Mgt	Manage Communications	Control Communications	
Risk		Plan Risk Management Identify Risks Qualitative Risk Analysis Quantitative Risk Analysis Plan Risk Responses		Control Risks	
Procurement		Plan Procurement Mgt	Conduct Procurements	Control Procurements	Close Procurements
Stakeholder	Identify Stakeholders	Plan Stakeholder Mgt	Manage Stakeholder Engagement	Control Stakeholder Engagement	

Project Management Research

- PMI touts several case studies showing the impact and efficacy of the effective use of the PMF on various types of projects
- Research has indicated that the greater awareness and knowledge of how to apply PMF = greatest chance of project success, when used correctly
- Effective use of project management processes actually led to successful results, and have attempted to align theory and practice for a more strategic way of applying project management in workplace settings *(Thomas, J. and Mullaly, M., (2007), Understanding the value of project management: First steps on an international investigation in search of value. Project Management Journal, 38: pp. 74–89.)*

Project Management Research

What do we know about project management?

All things are created twice;



first **mentally**;



then **physically**.

The key to creativity is to
begin with **the end** in mind,
with a **vision** and a **blue print**
of the desired result.

STEPHEN COVEY

Project Management Applications

How can you use the PMF approach as a grants professional?



Project Management Applications

1. 5 Grants Lifecycle phases = 5 process groups (mimics application from start to completion)

Grants Lifecycle Phase	PMF Process Group	Project Management Activities
Planning and Research	Initiating	<ul style="list-style-type: none"> Establish signed Memorandums of Understanding (MOUs) Identify stakeholders Identify risks Define scope and collect project requirements
Application Development	Planning	<ul style="list-style-type: none"> Create task matrix to identify stakeholders' roles on application development and project execution Create a risk register Create quality management plan Obtain quotes for vendor and subcontractor procurements Create Work Breakdown Structures (WBS) to identify how personnel will be used on the grant
Notice of Award	Executing	<ul style="list-style-type: none"> Create project management plan for post-award activities Manage project team and develop structure for key personnel adherence to application Set up stakeholder meetings (internal and external) to manage expectations
Award Monitoring and Management	Monitoring and Controlling	<ul style="list-style-type: none"> Quality control via evaluation measurement Maintain scope via adherence to Notice of Grant Award reporting and compliance requirements For vendor or subcontractor procurement, prepare RFPs and select vendors Maintain milestone deadlines and address schedule or cost variations
Closeout	Closing	<ul style="list-style-type: none"> Prepare all required documents for final project reporting Close procurements Ensure all grant funds are spent and project is officially closed from an accounting perspective (or transferred to organization if the project will be sustained)

Project Management Applications

2. Examples of discrete grants projects to use PMF:

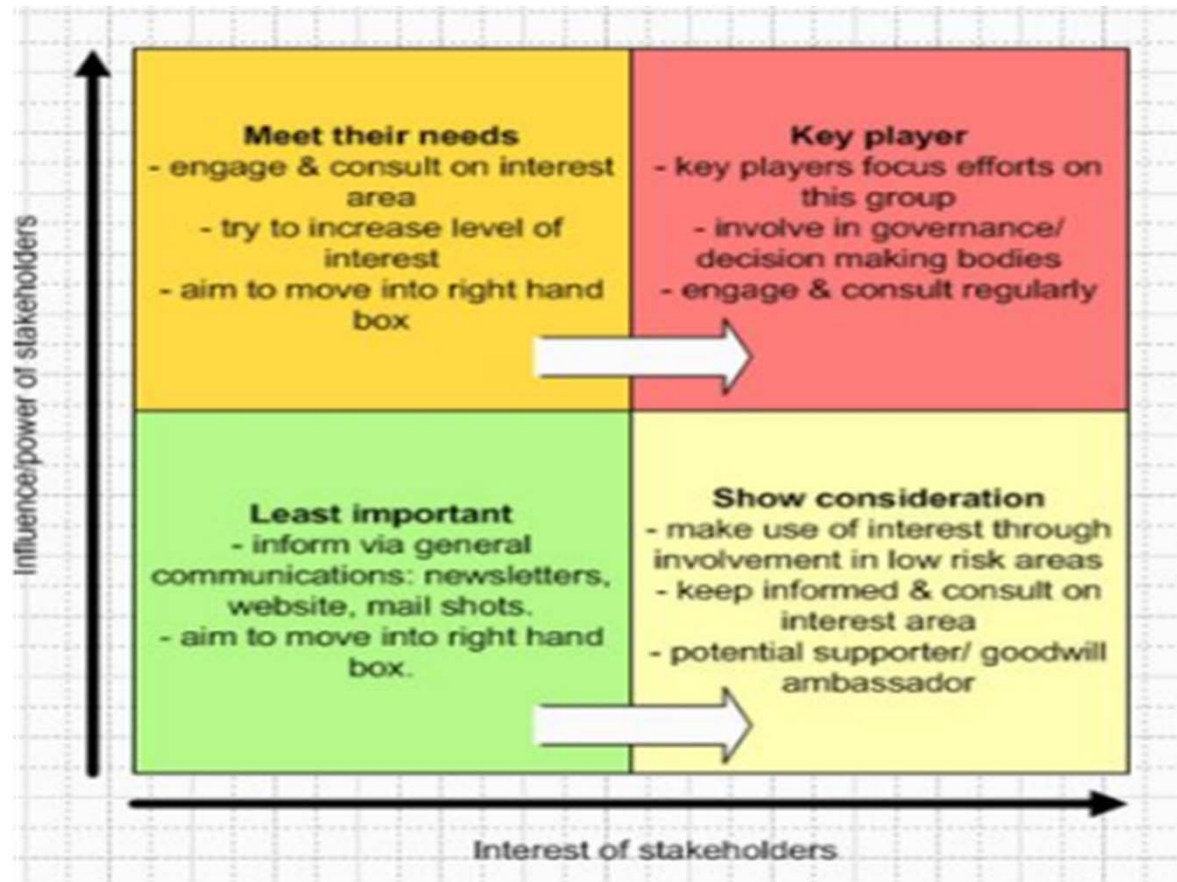
- Prospect research
- Strategic plan development
- Creation of grants policies and procedures
- Budget development
- Post-award monitoring
- Evaluation measurement and data collection

Project Manager's Toolkit

Toolkit Item	What is it?	Why is it needed?	Sample Projects
Project Charter	Outlines scope and plan	Multiple stakeholders and deadlines	Collaborative grant applications, launch of new program
Project Management Plan	Details the implementation for project	Establish accountability and status	Federal grant applications, creating SOPs
Stakeholder Analysis	Assess stakeholders' project involvement	Determine communications with stakeholders	Strategic planning, Establishing MOUs
Risk Register	Ascertain level of project risk and status	Highlight project weaknesses and challenges	All projects

Project Manager's Toolkit

Stakeholder Analysis



Resources

- Online Project Management software (mostly fee-based): <http://www.capterra.com/project-management-software/>
- Online Project Management software (free): <http://www.digitaltrends.com/computing/top-five-free-project-management-tools/>
- More Online Project Management software (free): <http://www.cio.com/article/2687036/collaboration-software/164583-7-Free-Online-Collaboration-and-Project-Management-Tools.html#slide1>

Resources

- Project Management Institute: <http://www.pmi.org/>
- Project Management Tools:
https://www.mindtools.com/pages/main/newMN_PM.html



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