



Successful Grant Management

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Welcome!

- Introductions
- Presentation
- Round table discussion
- Report back
- Sign-in sheet



How do Grantees successfully manage a Self-Help Housing Grant?





What are some Best Practices to use to become a successful Grantee?

- ▶ Countless literature is available offering *Business Success* tips
- ▶ There are some tasks essential to business success

- ▶ **Basics Functions of Management**

- ▶ **Project Management Skills**

- ▶ **The 3 P's of a Successful Business**



USDA- RD Program Criteria

The Self-Help Housing Program has certain ideals that must be maintained

The Five Grant Goals

- Number of assisted families/
Number of completed homes
- Minimum 40% very low-income
- Participant labor requirement
- Technical Assistance cost
- Other

Other Goals / Ideals

- Participants Labor Tasks
- Modest Housing
- Equity
 - Participants expect to save money
 - RD likes to see cost savings
 - More than one way to save:
 - Participant labor
 - Bulk purchasing
 - Accurate cost estimates
 - RD may enact equity requirement





Five Basic Functions of Management

- Planning
- Organizing
- Coordinating
- Leading/Directing
- Controlling



Planning

- Setting goals and objectives, policies, procedures, action plans
- Thinking before acting, preparing for the future, mapping the road to be followed

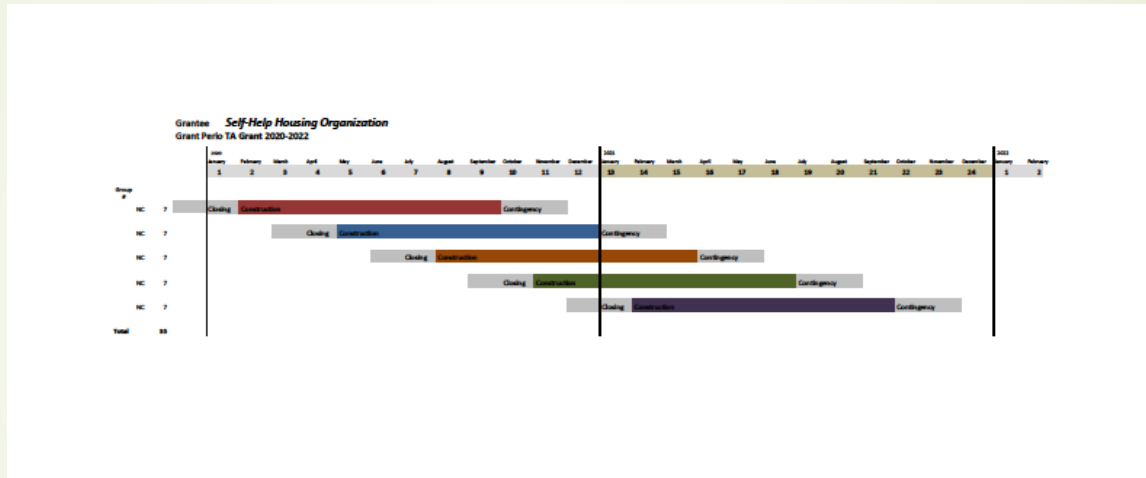
Organizing

- Decides how the work will be divided and accomplished
- Assign job duties and structure into sub-departments, sections, units, or teams

Coordinating

- Bring together all the program elements to the right place at the right time
- All activities at all levels are synchronized

Planning, Organizing, Coordinating



Leading/ Directing

- Recruiting/hiring, orienting and training employees
- Leading, teaching, coaching, motivating and supervising the self-help housing team

Directing plays a major role in employee morale, job satisfaction, productivity and communication.



- My BEST Leadership Style
- Productive Leadership Behaviors
- *True Colors*: the assessment
What Color are you?

Controlling



- Determining whether or not plans are being met
- Correcting deviations and shortcomings
- May need to limit spending, a grant amendment/ extension may be requested, if justified



Contemporary Management

- Innovation
- Marketing
- High Performance Teamwork
- Strong Leadership

Current trends establish a correlation between high performance teamwork and strong leadership

Teamwork

What Does a High Performing Team Look Like?



According to *The Lencioni Pyramid*, there are five areas that are vital to the success of teams: *Trust, Conflict, Commitment, Accountability and Results.*



Grant Oversight

- Monitoring
- Tracking
- Evaluation

...Grant Oversight

Required Reports and Quarterly Review Meetings

► Reports

Quarterly Reports

- Primary monitoring tool of program
- Supplemental reports are recommended



Monthly Report

Reports can be generated by SHARES (Self-Help Automated Reporting and Evaluation System)

► Meetings

Quarterly Review Meetings

- Include Grantee, Rural Development, T&MA Contractor
- Review progress, activities, schedule and financial report

Weekly Meetings

- Grantee Self-Help housing Team
- Other: Land Development, Construction Team and Participants

Regular staff meeting is an effective program management tool

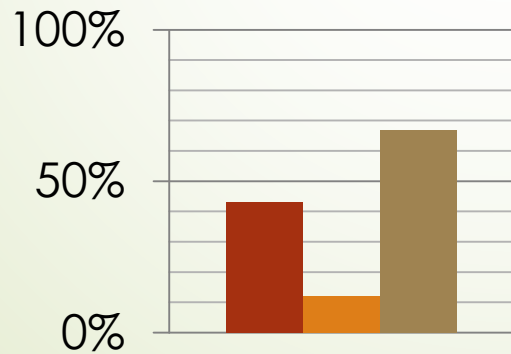
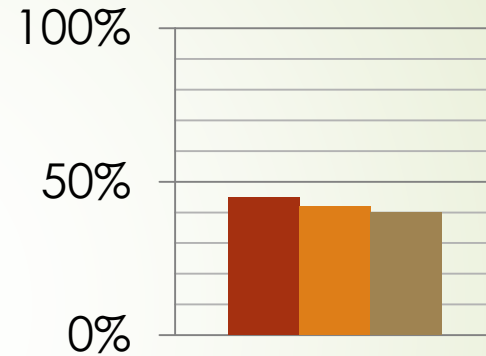
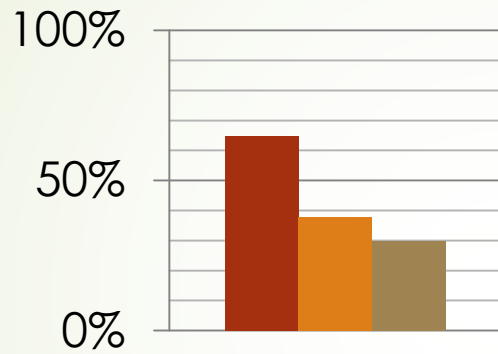


Grant Oversight

On- Going Assessments and Final Evaluation

- T&MA Contractors' Reviews
 - Initial Financial Certification
 - Quarterly- Quality Control Assessment
 - Annual Program Performance Review
- Board of Director's Annual Self-Evaluation of the Program
- Rural Development
 - Quarterly Reviews
 - Final Evaluation
 - Review of the five criteria to determine how successful the grant was
 - Rated as unacceptable, acceptable or outstanding

Grant Progress Analysis



■ Time
■ Eus
■ Spending



Construction Project Management

Construction Project Management

What is Construction Management?

Is a professional service that applies effective management techniques to the planning, design, and construction of a project from inception to completion for the purpose of controlling time, cost and quality

-Construction Management Association of America (CMAA)

The art of directing and coordinating all resources throughout the life of a project

- Project Management Institute (PMI)





The 3 P's of a Successful Business

- **People**
- **Product**
- **Process**

The People

Organization's real strength comes from the effective use of its most important resource ⇒ people

Who are Our People?

- Staff
- Board
- Rural Development
- T&MA Contractor
- Participants





Staffing

Many factors determine **staffing patterns**

- ▶ Typical positions consist of:
 - ▶ Program Director/ Executive Director
 - ▶ Group Coordinator/Loan Packager
 - ▶ Bookkeeper
 - ▶ Construction Supervisor
 - ▶ Other: Land developer, contracts manager,...

Hiring

- ▶ Have the right people in the right positions

Board

- ▶ Annually the Board is required to conduct Self-Evaluation of the Program



Rural Development

- Maintaining a good relationship with Rural Development is one of the most important aspects of a successful program
- Partner to achieve goals

Self-Help Participants

- Hugely important part of program
- Have realistic expectations
- Have a good/ enforceable membership agreement

The Product

What is our product?





The Process

Program Operations

- Feasibility
- Marketing / Recruitment
- Intake
- Loan Processing/ closing
- Site Survey/ Environmental Review
- Site Acquisition/development
- Pre-construction
- Construction
- Financial Management
- Funding
- Other



Financial Management

- Organization
- Programs
- Participants Accounts

- Financial management is important for success
- Internal control is a cornerstone of financial excellence
- Have written financial procedures

...Financial Management

The main 3 Reasons Small Businesses Fail

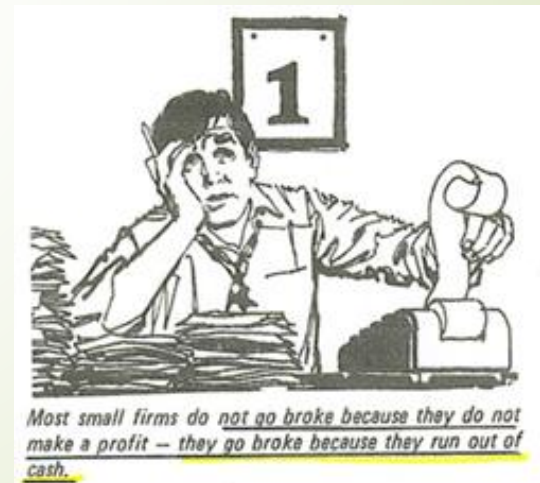
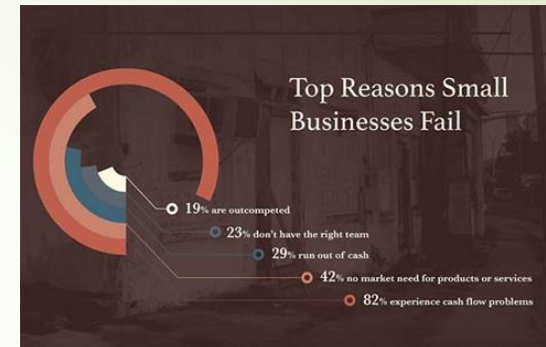
- Cash Flow
- Fast Expansion
- Low Profit Margins

The #1 Reason

- 82% of small business fail due to cash flow problems

Useful tips

- Maintain a 12 month cash flow statement
- Get yourself a great accountant (or CPA)





Keys to Success

Keys to Success



Best Practices



- *What strategies, tracking tools, and processes are you currently implementing to manage your grant?*
- *Are there any difficulties that you are currently experiencing in managing your grant?*
- *What best practices to overcome these challenges do you wish to share with your colleagues?*



The End!

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