D3 DREAMBOOK: REIMAGINING THE AWARD ADMINISTRATION LIFECYCLE

Brought to you by: Revel Consulting
JULY 2019
DREAMING BIG TOGETHER

Managing awards effectively is critical to our success. This Dream session is the first time that we’ve brought together a diverse set of team members from across Mercy Corps, our NGO peers and tech partners to truly understand what it takes to realize our potential.

This two-day Design Thinking workshop, lead by Revel Consulting, included representatives from Programs, Finance, IT, HR, RD, Compliance, Mercy Corps Europe, PATH, World Vision, Microsoft and Nethope. This diverse team participated actively to create the vision captured in this Dreambook. It will serve as the foundation for a successful transformation.

MICHAEL BOEGLIN
Sr Director & Chief Information Officer
All non-profits are putting out the call for change and innovation. We operate in an industry where donors are increasingly demanding information to be available, and we need to widely support our endeavor to meet this growing expectation in a more efficient manner.

Award management is a complex challenge, one that every non-profit flags as their number one issue.

It’s an issue that touches almost all of Mercy Corps, but our current systems are not well integrated, adaptive or sufficiently meeting the needs of multiple teams.

How can we innovate to solve this complex problem?
WHERE WE ARE TODAY

JAN 2019
Dream kickoff!

MAY 2019
Dream Workshop in Portland with coalition partners:

PATH World Vision

JULY 2019
Dreambook delivered

Decide on Design phase scope

Kickoff Design

Kickoff Deliver
PART 1: FLARE
UNDERSTANDING THE LIFECYCLE

“We must design for the way people behave, not for how we would wish them to behave.”

DON NORMAN
In order for us to understand all stakeholders involved in the journey, and to pay attention to specific needs, pain points and voices, we interviewed all of the participants in the MC universe.

Here are the 8 main archetypes that touch the award administration lifecycle:

- THE LEADER
- THE PRODUCER
- THE IMPLEMENTER
- THE COLLECTOR
- THE STORYTELLER
- THE ANALYST
- THE STRATEGIC PARTNER
- THE DONOR
This archetype balances data with organizational vision and strategic insights to make crucial financial and programmatic decisions. Sometimes the leader can also appear in a role as a gentle persuader. In the latter, they are expected to gather insights and bring others along with mission and vision.

**THINK & FEEL**
- A lot of pressure and responsibility
- Under resourced
- Making decisions needs confidence in the data/analysis
- Dependent on teams and other departments
- Swimming against a current of ambiguity and uncertainty

**SEE**
- Conflicting information
- Fun process, strategy become reality
- Successes & failures
- Recurring problems... again, and again, and again.
- Disjointed & illogical organizational investments
- Needs to see the path to the vision

**HEAR**
- The pain points of her teams and other departments
- Competing voices, visions, strategies and systems
- “Do more”
- “Fix that”
- “We can't”
- What's next?"
- “I look up to you”

**SAY & DO**
- We can do this!
- Guides development of plans and actions
- Advocates for people
- Wants to say “no” but is bound by “yes, and…”

**Gain:**
- More donors & increased revenue
- Individual and team feeling/celebration of success
- Team openness and buy-in to state
- Growth
- Space and flexibility to be creative

**Pain:**
- Performance pressures
- Inefficiencies
- Incomplete, disparate and slow data processes
- Resource constraints and limitations
**PERSONA**

**The Producer**

This role aggregates, shapes, and manages information from multiple sources in order to create assets and requirements for proposals.

**SAY & DO**
- “I don’t have enough time, for lack of decision-making”

**HEAR**
- Varying viewpoints
- Technical input
- Practical application
- “I need to be data-driven”
- “I need to think big/creative/innovative”
- “I need to win”

**SEE**
- I only see part of the picture
- Chaos & disorganization
- A lot heart, enthusiasm and passion

**THINK & FEEL**
- Intense time pressure
- Balance between donor requirements/wants vs. participant needs
- Can I count on my team to deliver?
- Am I the appropriate person to do this?

**Gain:**
- Having the right/perfect team
- Having clear process
- Having info accessible and at your fingertips

**Pain:**
- Lack of clear decision-maker
- Lack of time
- I don’t have enough info/data
The Implementer

These people deliver programs & services to participants. They are directly responsible for achieving activities that the larger organization has committed to. This could include managing donor commitments and award agreements.

**SEE**
- Nuances
- Uniqueness of their context
- Direct impact
- Opportunity for change

**HEAR**
- Lots of acronyms
- Competing priorities
- Feedback from program participants
- Criticism from HQ/donors
- “Do more with less”

**SAY & DO**
- “Why does he need ____?”
- Putting participants/communities needs first
- “What is the DL/HUB/GAIT/TOLA...?”

**THINK & FEEL**
- Overwhelmed
- Disconnected from larger organization
- Single-minded focus
- Reality of award funded job cycles

**Gain:**
- Legitimately doing amazing work.
- Innovating/innovative
- Problem solvers

**Pain:**
- Isolation: no one knows what we do
- Never enough support
- Competing demands
- Pressure to overwork
- Constant reinvention of the wheel
- Skill needed: How to talk about your work
These people collect data from various sources within the organization in order to be processed. Data can take many formats, and processes may sometimes be slower to collect or hard to find due to different country procedures or no top-down organizational guidance.

**PERSONA**

**The Collector**

**SAY & DO**
- Where is the data stored?
- It is a difficult process
- No trust-worthy source
- No time for higher-order work

**HEAR**
- Ad-hoc requests for info
- Who should do what?
- Weird problem!
- This program/group knows how to do it better
- Need now, but difficult to gather

**SEE**
- Basic info not available
- No set procedures/norms
- Knowledge loss repeatedly
- Lack of consistency from funders – percolates across org – tag differently
- Different needs for donor vs. internal decision making
- Subjective processes
- How does my data entry impact downstream

**THINK & FEEL**
- Clear goals around IMPACT
- Finding the ‘right’ partner
- Like to feel in charge
- Self image, public perception
- Negative news cycles impact them
- They want to help
- Do something bigger than themselves
- Really believe in mission
- May believe it’s futile

**Gain:**
- Increased impact
- Increased efficiencies
- Increased standardization (tools, formats)
- Consistency
- Better downstream work (analyst, storytelling)
- Better knowledge management
- Unleash – big picture thinking
- Better overall org KPI’s & dashboards
- Better analysis which leads to better decision making.

**Pain:**
- Funding model
- Desired data not currently tracked
- Different formats
- Ad-hoc info requests
- Access to info
- Timelines
- Multiple systems – too many tools, don’t matter req.
- Inconsistent use of systems
- No service that is trustworthy – Data quality
- Changing metrics – no baselines.

**+**

**-**
These folks share the messages to the wider network about implementation, program impact and award areas. This can happen through traditional marketing, and untraditional campaigns, both internally and externally.

**PERSONA**

**The Storyteller**

**SAY & DO**
- Maybe I’m not the right storyteller
- Provide proper context with each story
- Modify presentation of story based on audience

**HEAR**
- Understand impact
- Did we achieve our results?
- Can we do our work more efficiently?
- What’s your past experience?
- Are our programs on target (programmatically and financially?)

**SEE**
- Center story to different audiences
- See the impact on funding from telling the right story

**THINK & FEEL**
- Access to data/info makes me feel frustration. Maybe I am not the right storyteller, but I want to help.
- What is the story I’m trying to tell?
- Will this story support different decisions?
- How do I gather information to tell a story?
- Pride in Mercy Corps’ accomplishments
- Nervous if story was wrong and creates an agency liability
- What is the medium that will allow my story to be best received?

**Gain:**
- Empower stakeholders when they can connect the dots through our stories
- Historical / institutional context and memory to help present and future selves
- Greater funding opportunities

**Pain:**
- Access to data/info
- Reconciling similar data from different systems
- Need for information is different based on the vantage point of the storyteller (i.e., implementer, R&D, agency analytics)
The Analyst

This role processes data to understand impact, which helps guide better decision making. These people raise up information about where the organization may be falling short and view the data and metrics of an award cycle.

SAY & DO
- I need this data to do the analysis
- When gaps, make assumptions
- Synthesize data and draw conclusions
- Balance fair representation of data with storytelling
- Create visual reporting structures

HEAR
- "I need..."
- No time for data collection
- Present data in X way
- Data difficult to collect
- Asking for too much data, inhibiting other work
- "Why can't you just use this tool...?"
- X info is critical
- Why isn't data positive?

SEE
- Spreadsheets
- Conflicting priorities in how it is manifested in data
- Hear data is critical but don't see how it is used to inform decision
- Gaps and inconsistencies

THINK & FEEL
- Think that there is a wealth of info but hard to access
- What questions are we answering?
- Worry that the info for analysis is missing
- "...Am I measuring the right metrics?"
- Quantity vs. quality
- Consistency and accuracy of data – trustworthy?
- How do I communicate this complex data to different audiences?

Gain:
- Data driven insights
- Accountability
- Clarity
- Answer difficult questions
- Capacity for adaptive management

Pain:
- Collecting data
- Overwhelmed
- Inconsistencies/gaps
- Waiting for data
- Balance expectations w/ data
This role provides the support and foundation for daily operations. These are subject matter experts or support functions who can be brought into the award lifecycle at strategic points.

**PERSONA**

**The Strategic Partner**

**SAY & DO**
- Repeated support
- Elevating issues
- 1:1 direct program support
- Damage control
- Connect to resources
- Communicate with donors/external resources
- Piecing together a puzzle
- Looking for support (moral & financial)
- Sharing success stories
- Elevate talent

**HEAR**
- Unburdened needs
- Problems/issues
- Competing priorities
- Why am I the last one to know?
- All-agency effort & solution
- Needs
- "Be efficient"
- Tired justifications - “we can’t”, excuses
- Can you pay for it?
- Bright spots
- Success stories to inspire

**SEE**
- Fires
- Avoidable messes
- Gaps
- Whole system
- Eager, motivated team members
- Ability to do more

**THINK & FEEL**
- Where are there current problems?
- "This makes perfect sense" (it might not)
- Program content overview
- Burnt out
- Feeling "behind"
- Donors to pursue
- Overwhelmed
- Talent/staffing support
- Late
- "I told you so"
- Impact
- Monitoring & evaluation reporting
- Quality standards for their technical area
- Influence team to actually take recs into action

**Gain:**
- Elevate talent
- Moral support
- Time to create rather than firefight
- Problem perimeter
- Standards + accountability = Operational efficiency + transparency
- Solutions finder
- Perspective

**Pain:**
- Siloed
- Lack of consistency between departments
- Bespoke solutions
- Limited bandwidth/capacity
- Under-resourced change management
- Enabling inefficiencies
PERSONA

The Donor

This role provides financial resources to fund programs. They want to have maximum impact to participants and expect to see the money-to-impact report.

SAY & DO
- Do it ‘my way’
- If... then... (quid pro quo, or else)
- Give $$$
- Give $
- Show me/PROVE IT
- Great Job!
- Can we do this in a new, innovative way?

HEAR
- A lot of requests
- Complaints (likely more negative than positive)
- Conflicting/differing opinions & solutions
- “It’s the end of the world!!!!!!”
- “YOU can make a difference”
- MC can help you make a difference.

SEE
- Broad perspectives (opportunities + partners)
- Ability
- A need
- News/Problems

THINK & FEEL
- Clear goals around IMPACT
- Finding the ‘right’ partner
- Like to feel in charge
- Self image, public perception
- Negative news cycles impact them
- They want to help
- Do something bigger than themselves
- Really believe in mission
- May believe it’s futile

Gain:
- Impact
- Perception (improved)
- Feel better about themselves
- The world is a little better
- Tax breaks
- Peace of mind

Pain:
- Limited resources
- Complexity
- Deciding where to give and what will have the greatest impact
MAPPING THE AWARD ADMINISTRATION LIFECYCLE

- Award Identification & Design
- Award Setup & Planning
- Award Tracking & Evaluation
- End-Of-Award Transition
- Award Implementation
PERSONAS INVOLVED:
- The Strategic Partner
- The Donor
- The Leader
- The Implementer
- The Analyst
- The Producer
- The Storyteller
- The Collector

TOOLS
- Donor Lists
- Donor Strategies and Projection
- RDs CRM
- Design Kickoff Method
- Past Donor Data
- Gait
- Sub Award Agreements & Rules
- Budget Templates
- HQ Data
- Past Program Knowledge

PHASES
IDENTIFY
- Many donors have opportunities through word of mouth
- Some donors don’t have similar award cycle

OPPORTUNITY ASSESSMENT
- Need more data from end of MC programs
- Need for better MC standards for assessment
- Need role clarity

DECISION MAKING
- We are too reactive
- Need better go/no go criteria
- Strategic partners don’t have enough time to assess if this is a good opportunity
- Last minute deadlines can throw off decision making

RESEARCH
- Need up to date field data and program metrics
- How can we utilize our data
- Silos

PRE-PLANNING
- Need better talent management
- Capacity issues
- Need dedicated team

PROPOSAL & SUBMISSION
- External disruptors: sensitivity, political unrest

PAIN POINTS
- Many donors have opportunities through word of mouth
- Some donors don’t have similar award cycle
- Need for better MC standards for assessment
- Need role clarity

HOW MIGHT WE...
- Maximize efficiency through automation & integration?
- Agree as an agency on data framework; on what data we want and for what purpose?
- Identify who is accountable and apply appropriate resources?
- Interconnect our systems that enable great program outcomes?

JOURNEY PHASE
Award Identification & Design
**JOURNEY PHASE**

**Award Setup & Planning**

**PERSONAS INVOLVED:**
- The Strategic Partner
- The Collector
- The Implementer
- The Donor
- The Leader

**TOOLS**
- ARC (Award review sign-off process)
- PM@MC Toolkit
- Google Suite
- Excel
- GAIT
- NAIS
- Complex Programming Support
- MEL Wiki
- The DIG
- Navigator
- Tola

**PHASES**
- REVIEW AGREEMENT/CONTRACT
- NEGOTIATE AGREEMENT
- UNDERSTAND COMPLIANCE REQUIREMENTS
- ADDRESS DETAILS
- REVIEW PROPOSAL
- CONFIRM IMPLEMENTATION
- ADAPT DESIGN
- DEVELOP BUDGET AND WORKPLAN
- INDICATOR PLAN & BASELINES
- SUBMIT TO DONOR

**PAIN POINTS**
- Turnover
- Systems not connected, so requires duplicate set-up in each step
- Programs do not equal awards. Grants and programs lack definition
- Each award is treated differently depending on donor
- Lessons learned aren’t documented
- NAIS is not updated and info is lost
- Indicators are not clear / misunderstood
- M&E not properly budgeted
- Fear of deviation
- Lack of institutional memory

**HOW MIGHT WE...**
- Develop data standards & system integration for data flow so that data can be shared readily, reduce duplicative processes/entry & improve data integrity?
- How might we improve data to integrate our systems so setup in one system flows into other systems?
- How might we support adherence to program standards which allow us to efficiently monitor, enhance and act upon program performance?
- Clearly define, automate streamlined processes that enable prompt & efficient program startup?
**JOURNEY PHASE**

**Award Implementation**

**PERSONAS INVOLVED:**
- The Strategic Partner
- The Donor
- The Leader
- The Implementer
- The Analyst
- The Producer

**STAKEHOLDER RELATIONS**
- Manual procurement planning & tracking

**PAIN POINTS**
- Budgeting: too many things/value reach vs. depth, etc.
- Manual procurement planning & tracking
- Overworked staff/turndown
- Lack of onboarding resources and support
- No consistent onboarding training
- Staff retention
- Get clear picture of data access /awards/sectors
- M&E gaps or total misses
- Lack of integration in data collection tools
- Lack of award management capacity
- Difficulty meeting minimum standards across the board (in all programs)
- Excessive donor requirements
- No transparency/no info to tell us how a program is doing
- Poor implementation that could be avoided with better tech support
- Lack of award management capacity
- Data is hard to find (or is missing?)

**HOW MIGHT WE...**
- How might we radically transform data/data management at MC?
- How might we ensure all staff (and donors) have the right info at the right time?
- Give country teams the space they need to innovate while ensuring agency-wide standardization so that teams can invent without reinventing the wheel?
- Increase visibility of data to create a culture of continual improvement?

**TOOLS**
- Jobvite
- HCM
- Podio
- Navigator
- Smartphones
- Physical offices
- Warehouses
- Cash transfer tools
- Land Cruiser
- Intranet (workplace)
- The Hub
- Digital Library
- Talent Website
- Connect (budget vs. actual)
- awesome tools/templates that are hard to find and don’t get used
- Many manuals protocols/forms overload
- Inconsistent systems between HQ’s
- Lack of guidance on forecasting
- Lack of standardization

**DATA ANALYSIS**
- Increase visibility of data to create a culture of continual improvement?
PERSONAS INVOLVED:
- The Strategic Partner
- The Donor
- The Leader
- The Implementer
- The Analyst
- The Producer
- The Collector

AWARD TRACKING & EVALUATION

JOURNEY PHASE

IDENTIFY
ORGANIZE
SET UP DATA REPORTING
ANALYZE
COMMUNICATE/+ REPORT
DECISION MAKING
ITERATE

IDENTIFY
- Need better/more reporting metrics
- Lack of data frameworks

ORGANIZE
- Set up data reporting
- Organize
- Analyze

SET UP DATA REPORTING
- Communication
- Reporting

ANALYZE
- Decision making

COMMUNICATE/+ REPORT
- How to collect and work through important data

DECISION MAKING
- Need to make evidence-based decisions

ITERATE
- How might we...

TOOLS
- GAIT
- TOLA
- PowerBI
- DIG
- The Hub
- Workplace
- Hardware/ Tablets
- R
- Sun
- Wrike
- Kobo
- ONA
- Navigator
- DL
- Digital Library
- Slack
- Comment Cards
- Google Sheets
- Independent Contributor Workflow
- G-Suite
- Team Drive
- Shared Docs
- Email
- Jet Reports
- Raiser’s Edge
- Word
- Excel
- External consultant tools

PAIN POINTS
- Too many tools
- Need common and secure repository for data
- Integration, data flow, accessibility & visibility
- Need better/more reporting metrics
- Lack of data frameworks
- Are often unable to back up the results that are reported to donors
- Need to make evidence-based decisions

HOW MIGHT WE...
- Maximize efficiency through automation & integration?
- Track and evaluate awards in a way that informs decisions at program, country and agency level?
- Find a balance between standards and flexibility?
- Increase visibility of data to create a culture of continual improvement?

HAPPENING CONSTANTLY:
- AUDITS
- DONOR VISITS
- DONOR COMPLIANCE QUESTIONS
- MAINTAINING REPORT SCHEDULE
- HOLD MC ACCOUNTABLE TO GRANT INPUTS
End-Of-Award-Transition

**JOURNEY PHASE**

**PERSONAS INVOLVED:**
- The Strategic Partner
- The Donor
- The Leader
- The Implementer
- The Analyst
- The Storyteller
- The Producer

**REVIEW CONTENT**
- Need to standardize performance metrics
- Lack of data frameworks

**DATA & RECORD RETENTION**
- Various standards and tools already exist but no one truth
- Lack of data frameworks
- Too many tools

**STORYTELLING**
- Are often unable to back up the results that are reported to donors
- Need better business process

**CLOSE-OUT**
- Lack of people for close-out
- Agency doesn’t care about close-out
- Need to make evidence based decisions

**INTERNAL & EXTERNAL REPORTING**
- Make process transparent & visible
- Close-out can be slow and late to complete.

**TOOLS**
- GAIT
- TOLA
- PowerBI
- Navigator
- Excel Files
- E-mail
- External Tools
- Reporting Tools

**PAIN POINTS**
- Use learnings as a launch-pad for team
- Need tech solution for archiving
- Integration, data flow, accessibility & visibility
- Need to standardize performance metrics

**HOW MIGHT WE...**
- Transparently close programs for all stakeholders?
- Produce purposeful content that drives strategy, continuous improvement and relationships?
- Streamline, automate and integrate across teams the program close-out process?
- Radically transform data/data management at MC to improve transparency at all levels?
PART 2: FOCUS
DEFINING THE RIGHT PROBLEMS

“If I had an hour to solve a problem, I’d spend 55 minutes thinking about the problem and 5 minutes thinking about solutions.”

ALBERT EINSTEIN
After we mapped out each journey phase, we assessed each area and assigned them pain points, opportunities and positive actions. Here, we started to see some common themes forming.

In order to prioritize and synthesize disparate information from the previous user journey exercises into usable “how might we?” statements, we took each group’s questions, and grouped them into clear themes.

We then had each workshop participant vote on the importance of each, and combined the top votes into four clear questions:
1. Make more data-driven forecasts and decisions throughout the award administration lifecycle?

2. Free up more time at every stage in the award administration lifecycle to focus on the right task?

3. Preserve or reveal institutional knowledge to the right people at the right time?

4. Strengthen adaptive award management by providing greater clarity of roles and responsibilities?
PART 3: FLARE, AGAIN!
IMAGINING THE FUTURE STATE

“Creativity requires the courage to let go of certainty.”
ERICH FROMM
Next, we took our “how might we” statements, and we paired them with different scenarios in order to prompt group brainstorming.

By creating guided subjects to brainstorm about, we were able to prompt large-scale idea generation…and we do mean large-scale.

• **Note:** A comprehensive list of all the “how might we” brainstorming ideas are available at the end of this PPT.
DREAM PITCH COMPETITION

IDEA POSTERS
IDEA POSTERS

DREAM PITCH COMPETITION
PART 4: FOCUS ON THE DREAM TRANSFORMING THE WAY WE WORK

“Coming together is a beginning. Keeping together is progress. Working together is success.”

HENRY FORD
...field staff knew exactly **which step to take next** in the award management lifecycle, including who to involve for additional support.

...we were able to retrieve **accurate real-time** financial and service data from any program to guide our program design and decision making.

...all Mercy Corps staff had access to the wealth of **institutional knowledge** in a single centralized location.

...based on our leadership in data-driven and adaptive award management, we were able to **transform the sector** to be more transparent, sustainable, and efficient.
GOVERNANCE & OPERATING MODEL

KEY SCENARIOS

- Implementers and collectors receive clear guidance on what data to collect and the suggested methodology.
- All personas have clear top-down leadership direction on process and tools through an executive communication plan.
- All personas operate according to standardized guidelines around tool/system usage.
- Storytellers and analysts can tell accurate individual and aggregate-level stories around impact.

FEATURES

- Governance of program files (where they live, how to access, what is recorded)
- Communication plan
- Standardized community ontology

CHALLENGES IT ADDRESSES

- Too many tools!
- Lack of change management and communication from leadership

BENEFITS & EXPECTED OUTCOMES

- Streamlined tools that are standardized across the agency
- Standard data format
- Ease of access to data

All personas have clear top-down leadership direction on process and tools through an executive communication plan.

Implementers and collectors receive clear guidance on what data to collect and the suggested methodology.
AWARD MANAGEMENT OWNERSHIP

KEY SCENARIOS

- All new Mercy Corps personas go through a standard onboarding process
- Implementers and collectors can view all prior program-related decisions at the start of onboarding to understand historical context
- All personas can easily view and take trainings based on role-based suggested learning tracks (both internal and external learnings)
- All personas know their role and responsibilities and know who to reach out to at each gate

FEATURES

- Standard Mercy Corps best practices
- Agile continuous improvement of processes and methodology

CHALLENGES IT ADDRESSES

- Poor mid-program onboarding experiences and lack of insight into key decisions made
- Lack of process continuity due to high field staff turnover
- Lack of knowledge sharing

BENEFITS & EXPECTED OUTCOMES

- Retain and access institutional knowledge
- Increased accountability
- Champion data understanding and use
- Potential to set up Center of Excellence across NGO’s
WORKFLOW OPTIMIZATION

KEY SCENARIOS

- **All personas** are engaged automatically at the right time in a standardized process
- **Implementers** and **collectors** understand the next course of action and systems involved at each step
- **Role-based prompts** to connect all the people involved in a award at the right time
- Compliance and legal **strategic partners** can set data preservation guidelines to meet compliance needs while also maximizing data security and retention best practices

FEATURES

- Past award/proposal content repository
- Standardized processes
- Common milestones throughout end-to-end process
- Automated workflow steps

CHALLENGES IT ADDRESSES

- Lack of standardized process and milestones
- Data silos due to systems and lack of awareness of process

BENEFITS & EXPECTED OUTCOMES

- Increased accountability
- Efficiency gains
- Greater collaboration across functions
**INTEGRATED SYSTEMS**

### KEY SCENARIOS

| **All personas** can log on to a centralized system to document all program-related decisions and lifecycle changes |
| **All personas** can quickly search up key decisions and updates by key points in time |
| **All personas** receive automated alerts on changes to operating environment due to macro factors (government, unrest, culture, etc) |
| **All personas** can subscribe to updates on specific awards, programmatic areas, or donors to populate personal newsfeed |

### FEATURES

- Integrated with TOLA, Navigator, Okta & Raiser’s edge
- Data insights shared with key internal and external stakeholders
- Single source of truth for all key programmatic documents
- Past award/proposal content repository

### CHALLENGES IT ADDRESSES

- Difficulty integrating data sources across multiple tools
- Donors want access to robust data

### BENEFITS & EXPECTED OUTCOMES

- Agency-wide trust in data
- Increased data security, privacy, and compliance
- Eliminates operational costs
- Surface up relevant updates and information
- Increased discoverability
ROADMAP

GOVERNANCE & OPERATING MODEL

AWARD MANAGEMENT OWNERSHIP

WORKFLOW OPTIMIZATION

INTEGRATED SYSTEMS
NEXT STEPS...

...LEADERSHIP BUY-IN
Establish cadence of reporting to leadership
Utilize network established by Workshop series as support for new asks and proposals

...PRODUCT PLANNING FOR DATA, PEOPLE AND TOOLS
Establish clear data frameworks
Assess and prioritize ideas that have come from the Dreambook

...IDENTIFYING TEAMS FOR IMPLEMENTATION
Create teams that have diverse user personas for better and stronger implementation methods
Remember opportunities and pain-points in each interaction

...CREATING A CULTURE OF EXCITEMENT FOR CHANGE
Share the Dreambook!
Find others who have participated in the work, and implement some of the brainstorming ideas that are present in the appendix

...ACCESSING CLEAR LEVELS OF SUPPORT
What support already exists?
How can you keep each other accountable?
Where can you strengthen your initiatives within cross-functional teams?

...ACTIVATING FRAMEWORKS
Identify thought frameworks.
How can you urge leadership to help create framework standards?
How can you start using frameworks in your own teams?
THANK YOU
We are over 200 thinkers, designers, storytellers, and builders inspired by the limitless opportunities each tomorrow brings.

With empathy as our guiding principle, we take a human-centered approach to ignite innovation, create powerful customer experiences, and drive business transformation in a shorter period of time.

Knowing that every organization has unique needs, goals, and expectations, we understand creativity and flexibility are as important as expertise.

Revel is ready to meet you wherever you are. We are eager to roll up our sleeves, make an impact, and achieve more—together.

To learn more about our work, check out revelconsulting.com

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APPENDIX

CREATIVE MATRIX

The following is a list of all the ideas that came out of the creative matrix session. Feel free to reference these ideas for ways to implement, problem solve, and create.
CREATIVE MATRIX

HOW MIGHT WE?

…Make more data-driven forecasts and decisions throughout the award administration lifecycle?

People & Partnerships:

- Have it be a factor in performance evaluations
- Regional Data Center of excellence (for support)
- Assign & communicate data drives
- Track partnerships
- Incentivize 5% learning on data science
- One finance system, fewer systems in general
- Regional data analysts
- Donor collaboration
- Standardization of questions to ask for forecasting
- Workshop & training; multi-time zone, languages
- Agency data group for training / guidance
- Outsource perform metrics info
- Performance management that is data reliant
- Have a centralized but accessible group
- Communicate data evidence for decisions from service management
- Increase data focused roles – i.e., team/region point to file internally
- Look at private sector metrics as example of our performance metrics
- Have virtual team meetings
- Agency business development – not type of agreement biz dev
- Agency-wide understanding of our business model & costing structure
- Assign an analyst position to each award that is responsible for providing context of the data and presentation

- Grant management support structure @ HQ
- Everyone knows what kind of data is relevant/needed for their job, and where to find it
- Roles are clear, guidance exists, documentation is our M.O.!
- Invest in Data Analysis
- End-to-end employee experience – onboarding to exiting the org
- Invest in data analysis
- Establish the system as the database of record for this info
- Gates of dependency of award progress based on teams entering complete & correct data, leading to better data!
- Clear forecasting methodology
- Ensure roles & performance reviews, look at whether these were completed
- Metadata quality audits and report outs leads to celebration of high-quality data and coaching of lower quality data entry/maintenance
- Know and discuss the limits of data. Weigh & balance data & other info
- Integrate data visualization so that leaders can better see data patterns and tell the story
- Impose continuous implementation process tied to data flows
- Experiment with data driven decisions – what does this mean for MC?
- Always, always, always, put data in context
- [...] peer working group on data & impact on decision making, to see if it has an impact on our collective programming
- Provide access to data on MC website to tell the story to donors and the media
- Data scientists to mine for insights
- Prioritize proposals based on data about likelihood of success
- Invest in Data Analysis
- End-to-end employee experience – onboarding to exiting the org

Agency business development

Agency-wide understanding of our business model & costing structure

Assign an analyst position to each award that is responsible for providing context of the data and presentation

Invest in Data Analysis

End-to-end employee experience – onboarding to exiting the org
CREATIVE MATRIX

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16. End-to-end employee experience – onboarding to exiting the org
…Make more data-driven forecasts and decisions throughout the grant administration lifecycle?

Facilities & Environment:

1. On quarterly basis – Change the default to making changes (even if small)
2. Big data wall with leader board
3. Ask a random stranger & compare w/ experts at MC
4. Data guidance – how to find what
5. Prioritize proposals based on data about likelihood of success
6. Ensure field has mobile-friendly access to data so they can leverage it on the go or in low connectivity scenarios
7. Combine disparate data systems
8. End-to-end system for grant admin that is available to all stakeholders
9. Data capture modules for online learning/onboarding
10. Clear definitions and a clear process for when new elements are needed
11. Common definitions of terminology across teams/departments
12. Circular seating chart (has a diagram attached) in which all departments converge with an open collaborative space in the middle. Diagram has the following: (Marketing, Fundraising, Programs, Finance, M&E, IT)
13. Centralized Data Analysis (Team needed?)
14. Data warehouse
15. Contextualization of data
16. Have an agency-wide CRM for data input from field & HQ
CREATIVE MATRIX

HOW MIGHT WE?

…Make more data-driven forecasts and decisions throughout the grant administration lifecycle?

Events & Programs:

1. Monthly "results" review w/ explanation for results that are off-plan
2. Encourage data storytelling evals to showcase key actions fueled by on-demand data
3. Encourage early & often reporting on grant opportunities from all team members
4. Quarterly brainstorm with program participants
5. Data competitions
6. Decision gates/milestones defined across grant lifecycle & reported on
7. Celebrations around milestones
8. Find who in org exemplifies good/best data practices/bring together cross-learning
9. Organize regular grant workshops to review data & make decisions & learn
10. Embed at least one day per week to data – entry, validation, improvement to process
11. Provide training to analyst on what information is available & how to use it for decision making
12. More cross-sector, cross-geography learning ops
13. Have regular data check-in days for programs to ensure everyone has a chance to report & validate data
14. Encourage best practice sharing across teams, for improved data related processes
15. Training programs for MC employees on new data tools to enable success and a data driven culture (events)

16. Expansive upskill/training on working with data
17. Hackathons with people in different roles (events)
18. ‘Did you know?’ fun fact data comms
19. ‘Data moments’ showcasing data at start of all meetings
20. X-NGO group focused on data & learning
21. Every program has a mandated “stop & reflect) week build in after each phase
CREATIVE MATRIX

HOW MIGHT WE?

...Make more data-driven forecasts and decisions throughout the grant administration lifecycle?

Technology & Digital:

1. What data do we have? How can we enable AI for routine tasks?
2. Create global data definitions and frameworks to address all reporting needs for all teams
3. MC radically [triangle shape = delta? Triangulates? Tents?] data flow & invests in improvement
4. Use sexy/enticing tools so users want to engage with the data
5. Enable data entry as part of process; take advantage of validation, etc. for ease
6. Use sector & org data to predict success & prioritize proposals we pursue
7. Software to tag and link programs to key lessons
8. Outline key decision to be made in the lifecycle & have a system that surfaces those with available data to focus on key decision
9. Indicator & workplan tracking software
10. GPS linked data connected back to task completion & stakeholders
11. Use program outcome data to determine future opportunities we pursue
12. Common tools for ETL & visualization
13. Code free role based IFTT customizable rules to forecast/alert
14. Be radically transparent about how data is defined collected and aggregated
15. Documented lifecycle workflow
16. All historical data available for insight mining
17. Bot based onboarding system (personalized)
18. Device to bring the internet on field visits to internet-less allies to help better data collection
19. Regularly updated base data
20. Implement data validation so we have confidence in data & data integrity
21. Center of excellence to incubate/showcase data initiatives
22. Decision criteria is clear at every stage with baked in guidance within the system
23. Ensure each @ phase data is gathered
24. Auto generate warnings (or high fives!) based on project indicator data
25. Go/no go tool that incorporates analysis of competition
26. Common data language across mercy, other NGO’s and funders (Rosetta Stone)
27. Base forecasts on lessons learned
28. Post live data feeds associated with grant portfolio & performance metrics
29. Define performance indicators to develop data flows to support
30. Always count things the same way
31. Transparent Data on all programs
32. Automatic pattern matching, to pull up all relevant grants based on keywords
33. Cross-project AI trend analysis (are all projects in a region behind this? Do projects fall behind at a certain time of year?)
34. Improve connectivity worldwide – mobile data entry/viewing
35. Employ drones to capture data/assets
36. Grant management tool that integrates with other tools and systems
37. Experiment with AI as the data becomes more robust and reliable
38. Audit your data. All the time.
39. Real-time dashboards showing all stats & metrics
40. AI generated correlation insights from historical data points (what drives success?)
CREATIVE MATRIX

HOW MIGHT WE?

…Make more data-driven forecasts and decisions throughout the grant administration lifecycle?

Surprise & Provocation:

1. Hackathon
2. Leaders present podcast about what they’ve decided with data
3. Have an internal fact-check team
4. Invite challenges – allow a healthy “B.S.” callout
5. AI-based forecasting
6. AI/ML!
7. Agree on data definitions!
8. Add a randomizer to the decision process
9. Remove the human beings from the final decision
10. Giant monitors for fun data facts/tracking in each office
11. Create a portal that allows for any data to be imported & processed correctly in 5 minutes or less regardless of bandwidth
12. Real time stats to donors (automated donor reports)
13. CDs “guess the program” based only on progress vs. indicators/workplace (a blind test)
14. Read the “Rise & Fall of the Roman Empire” and don’t make the same mistakes
15. Advocate w/ donors to do more program audits
16. Award “Mercy” bucks for data-driven decisions
17. AI-based forecasting
18. Automatic gathering for data that doesn’t require human input
19. Reduce # of sectors we work in to focus & streamline to what we do best

Advocate w/ donors to do more program audits
HOW MIGHT WE?

...Free up more time at every stage in grant lifecycle to focus on the right task?

People & Partnerships:

1. Redefine “Admin Support”!
2. More support for program teams to meet MS/Technical needs
3. Less paper/manual entry
4. Culture of continuous improvement that become standard practice
5. Packets for PMs w/ input on top tools
6. Hiring practices – better PD’s and hiring to the right role
7. Strong standards that must be followed. Then celebrate/highlight/adaptations/exceptions
8. Push the limits of delegating authority to every aspect of lifecycle
9. Gantt chart for key tasks q/ grant admin – develop @ start of program to support planning and time management
10. Only hire twins
11. Recruit more people
12. Access to tech and data talent to help teams with hard problems
13. Form/close out groups quickly . Often for grant management → slack channels
14. Consultant database or roster for when more help is needed – easy to access/hire – like phone a friend, or something

- What can be outsourced? Compliance, security procedures, best process…
- Standard guidance to distribute to partners
- Reorganize to reduce functional silos
- Understanding work patterns and who we spend our time
- More robust grants management team in all offices
- Need more specialization – we have too many generalists who are expected to be experts on everything.
- More people (focused on grant management)
- Access to tech and data talent to help teams with hard problems
- Remove proposal writing duties from the PO/SPO job descriptions
- Encourage leaders to encourage staff to be open about time struggles for better transparency ... ultimately better support/ideation
- At the agency level, suggest a 20% buffer of time to be added to all work plans to allow for the unexpected
- Grant shepherd – Every grant has to have one
- Grant management system trainer & onboarding team
- Hire enough people to get the job done
- Clear guidance – during process – tech tools
- Clear roles & responsibilities (minimize duplication of work in team)
- On-call surge support for programs
- Meeting time limits – always have time for an agenda
- Army of MC trainers to equip field groups to use technology & collect data
CREATIVE MATRIX

HOW MIGHT WE?

...Free up more time at every stage in grant lifecycle to focus on the right task?

Facilities & Environments:

- Integrated grant management system (with M&E, finance system)
- Real-time entry w/ field & HQ in same dig space
- Clear process: A-Z with minimum standards
- Simple point of accessible to field and HQ as a point to start
- Devils advocate – “Pre-Mortem”
- Combine department checklists for each stage/phase
- Guidance that removes ambiguity
- Better/fewer systems, remove time spent on choosing a system
- Embed a documentation day into close-out activities
- Decrease amount of data to enter
- IT guidance on tools
- Online self-guided training course for grant management system
- Spaces that spur creative ideation & collaboration regularly
- Grant cycle onboarding learning module
- Air traffic control room with giant board and flashing lights (green, yellow, red)

Make on the job documentation part of everyone’s JD and have a performance plan metric for it
- Scenario Gaming
- 3I to include greatest learning through mistakes
- Events & Programs
- Plan for exceptions & needed flexibility
- Daily dance breaks
- Meetings - more thinking outside the box on these
- Grant management system workplace group
- Programs / events with end participants, focus on what really matters
- Donor events where donor shares how to “win” their grants
- Regular in-depth program management trainings for field staff
- Systematize adaptive management – habit, most useful change
- Strong, practical orientation on basic procedures
- Prioritize – NOT ALL GRANTS ARE THE SAME
- Retros! Start, stop, continue
- Regularly schedule check-ins aided by dashboards & metrics
- Planning workshops at key milestones
- Strong practical orientation on basic procedures
- Focused, short, topical webinars at start
CREATIVE MATRIX

HOW MIGHT WE?

…Free up more time at every stage in grant lifecycle to focus on the right task?

Technology & Digital Media:

- Automate workflow
- Automatic reporting
- Automatic go/no go process, include workflow, CRM pipeline management
- Automate, automate, automate
- Single financial system (MCG + MCE)
- Combine disparate systems
- Automate and standardize as much as reasonable (decrease processing times)
- Unite sundry tech tools to single HUB, one master workspace
- Autofill
- Pop-ups that remind you of time you’ve spent on X
- Auto translate so data instantly avail across
- Comms w/ partner agencies to idea share & share with MC
- Sprint planning focus on deliverables / products
- End-to-end-grant management tool that makes people forget compliance

- Costing & budgeting tools to speed up proposal development and quality
- Standardized M&E database
- Grant management system prompts PMS
- Have teams broadly share their successes in saving time (how, why, etc.)
- Have each operational area create data dictionaries and standards to allow process streamlining
- Auto suggestion: What’s near? Deliverable/proposal to work on
- Select standard agency-wide digital data collection
- Define agency tools
- Chat function to ask how to questions at all hours and on all subjects – like a call center
- Automated “ticklers” (reminders) sent to device of their choice at key points of grant lifecycle
- Automate grant agreement data between all systems
- Automatic staffing needs forecasting based on work plan
- Project management software with standard templates for common scenarios
- Better computers to think faster
- More data informs standardized org charts that are followed
- Use AI to analyze winning & losing proposal
- Link files and info – to pre-populate
- More webinars… “award modules” for corporate/gov & other funders
- Automate closeout process for activity records
- Auto generate email templates for communal grant comms & price approvals
CREATIVE MATRIX

HOW MIGHT WE?

…Free up more time at every stage in grant lifecycle to focus on the right task?

Surprise:

1. A grant lifecycle exhibit – A VR experience (& POV perspective of the life of the grant)
2. Apply HP3 / FP3 standards to meetings
3. Demolish the thinking that systems stifle innovation
4. Agency level agreement on what we accept v. don’t accept from donors (terms & requirements)
5. Apply PAQ standards to HQ initiatives
6. AI to identify critical paths
7. Crowdsource grant review & editing
8. Create an AI digital assistant for grant management
9. Single support request system – field teams request help in one place, they are tracked, HQ services (all depts)
10. Software tool to promote realistic/healthy program timelines/workplans
11. Time-management robots
12. Better grant admin software – easier reporting
13. Agency trained /used project mgmt. software for teams
14. PM & M&E – Specialized, but repetitive – Set up regional units to do set-up & maintenance
15. “Self-generating” donor reports

1. Standards for each stage of the lifecycle are clear, and a system to support reminders
2. CLONES
3. Dynamic balancing of workload based on the # of grants & upcoming tasks. Does our country portfolio model still make sense?
4. Painpoints “thorns”
5. First: track time spent per function, and review, MEASURE and improve!
6. Get commitment to meetings, standards, agenda, comms, focus on IMPACT
7. 
8. 
9. 
10. 
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15. 

CLONES

Dynamic balancing of workload based on the # of grants & upcoming tasks. Does our country portfolio model still make sense?

Painpoints “thorns”

First: track time spent per function, and review, MEASURE and improve!

Get commitment to meetings, standards, agenda, comms, focus on IMPACT
CREATIVE MATRIX

HOW MIGHT WE?

...Preserve and reveal institutional knowledge to the right people at the right time?

People & Partnerships:

- Formal mentorship program.
- Dog feeding. Micro Mentor internally.
- Documentation hub that spells out whom and who to manage the data. A strong documentation culture.
- Deep learning/AI.
- Stories/impact emailed once a day.
- Regular check ins with tech expert during sap (scp?) development.
- Cross-regional mashup of functions.
- Not only new employees.
- Formal rotations in other departments and regions.
- Team responsible for ideating "best in class" materials for their...
- Clear close out process & tools.
- Link with university to capture core learning.
- TSU internal learning specialists.
- Hire a MC historian responsible for ensuring documentation of our institutional knowledge.
- Full time librarian.
- Onboard-inform who should have access to information, when, and why.

- Staff exit documentation process.
- Peer review of "best of class" materials.
- Mentorship Program.
- Improve staff retention.
- Introduce culture of continuous improvement tie to growing knowledge base.
- Identify knowledge associated with phases of the process.
- Cooperative agreement with pears for common knowledge base.
- Curated taxonomy for tagging.
- Dedicated librarians for data storage classification and retrieval.
- Determine what knowledge should be shared, bake into process.
- Collect PMs in the same stage in lifecycle for a COP/Cohort share.
- Have permanent program staff position that move between programs with STAs in between.
HOW MIGHT WE?

…Preserve and reveal institutional knowledge to the right people at the right time?

Facilities & Environment:

» Global virtual collaboration space to share information and knowledge
» Reduce file movement
» Increase accessibility to the right people
» Khan Academy of Mercy corps all data mobile – video
» Country level dashboards
» User friendly repository of succinct impact statements
» MC encyclopedia
» Offboarding standard procedure and diligence
» Role based onboarding packets that are auto-sent
» Knowledge awareness service to send links about relevant subjects based on personal interest.
» One digital filing and record retention system with security roles
» Create a KM map – visualization of data systems
» Information at grant level, everything you need to know about a grant so new team member can get up to speed
» Ensure all file structures – field, hq, cross department – are standardized
» Clear and consistent handover processes by role (checklist?)
CREATIVE MATRIX

HOW MIGHT WE?

...Preserve and reveal institutional knowledge to the right people at the right time?

Facilities & Programs:

1. A quiz show
2. 1 minute YouTube
3. One set of tools to train and roll out
4. Regularly scheduled celebration parties for knowledge transfer
5. Focus on the first steps of the lifecycle upstream
6. Define what we need to capture for whom, test and iterate
7. Regularly scheduled celebration parties for knowledge transfer
8. A library of archetypes
9. Create and share simple standards and templates that facilitate fast documentation and knowledge capture
10. Internal storytelling events recorded for future
11. Stories across geographies
12. Poetry Slam
13. Search Document library based on your role and experience
14. News blasts with project status updates and live dashboard attached for people to reference
15. Auto generated “best practice” suggestions based on AI analysis of project descriptions and tagged sections
16. Wiki-like tool for ease of access and search

1. Time based operational/management pro-tips provided to staff at key points in grant cycle based on past experience
2. Annual global share-a-thon
3. Inter-regional PM/OOP meetups/exchange events (sector based, content based)
4. Provide routine training to existing employees to ensure processes are consistent
5. 5-minute videos on our best programs
6. Pairing teams doing similar work
7. Team sites to keep institutional knowledge sharing readily available
8. No long narratives – focus on concise insights – auto curation
9. Strong orientation & continuing ed program
10. Have events that feature docs/info to everyone – global, regional, local
11. Re-onboarding at 5-year anniversary
CREATIVE MATRIX

HOW MIGHT WE?

...Preserve and reveal institutional knowledge to the right people at the right time?

Technology & Data:

1. Easy to access and understand dashboards
2. Centralized network so there is sharing and storage of files vs. stand-alone, laptop files
3. System that is easy to enter notes or key decisions
4. Store and make accessible contextual history. An alternative to email thread analysis
5. Highly curate Q&A hub
6. Cloud based storage that works for all requirements
7. No VPN – need a 21st century solution
8. Grant file archiving standards that remove duplication of program v. finance files
9. Codify our documents
10. Share templates that get revised like document telephone
11. Document archiving standards and requirements across whole agency
12. Brain uploads and downloads from human to computer
13. Pivot case studies searchable by geography sector, subject matter
14. Clear document change management alerts, newsletters
15. Surface w/out asking grant-related to what I am working on
16. Provide auto-generated insights depending on situation/problem-solving prompts and questions
17. Automatic/real-time collection and storage of promises/performance data
18. Linked-in just for MC
19. Suggested tags (Linked-in)
20. "Delve" for grants – what are others looking at.
CREATIVE MATRIX

HOW MIGHT WE?

...Preserve and reveal institutional knowledge to the right people at the right time?

Surprise:

1. **AI Curation**

2. **AI assisted search across siloed systems**

3. **AI to synthesize and summarize especially important interactions**

4. **Learning/growth – not just in on-boarding – like staggered growth process**

5. **Random DL document emailed to everyone weekly**

6. **Document destruction after X years – if you don’t update, it’s gone**

7. **Develop wizard to summarize what a new program team member needs to know based on role**

8. **Ask an “MC Elder” – round table, lunches**

9. **Tattoos**

10. **Virtual storytelling fairs**

11. **Agency wide better document/filing structure**

12. **Share systems with peer agencies**

13. **Define what we think we know, what we know we don’t know and need to learn**

14. **Space to learn what we don’t know what we don’t know**

15. **Develop processes to hypothesize, then set out to prove and publish**

16. **Mind meld data into brains from the matrix**

Additional ideas:

- **Make flood of info into a planned stream or trickle**

- **Write a book for public sale – what we have learned**

- **Matrix-like hookup for brain download**

- **Resist the temptation to say we tried that before – more openness to trying again and differently**
CREATIVE MATRIX

HOW MIGHT WE?

...Strengthen adaptive grant management by providing greater clarity of roles and responsibilities?

People & Partnerships:

- Grant management unit or PM for people in the field to refer to for projects and questions
- POs divided by Sector not geography
- Hire more analysts – analytical skills
- Clarifying what is Adaptable and who has authority
- Use global presence more effectively – able to keep things moving across time-zones
- Embrace self-aware flexible work hours
- For each grant you can visually see who’s working on it and viewing it
- HCM-linked auto generated org charts at the grant level accessible to everyone
- Each role/team gets a mascot
- POs that outline the role/responsibility in grant management PM@MC standards
- Organize by geography not by business process
- Grant admin Roles that sees all
- Results-based PDs
- Enhance agility of responses – clear roles that are responsible

- Grant admin teams responsible for grant performance tracking for KPIs
- Redefine and Organize
- Different colored shirts for different roles/responsibilities
- NetHope partnership for learning,
- Common space to share
- Cross department reg meetings
- Project management organized to share as a team
- Titles on everyone’s hub profile
- Workshops
- Train the trainer
- Training
- More MC data analysis people, not just ad hoc
- Dare to say what we do and what we don’t do
- Adaptive working hours/expectations
- Digital tags for roles (GPS) who and where always visible on a map
- POs divided by country, not US/EU
- Assign roles to specific team members
- Document standard set of roles and responsibilities for grant admin – Define
- Completely rethink our current team structures – major disruption
- Leadership
- Data owners

- Provide space for all team members to contribute to R&R definitions at startup with ongoing check-ins
- Dedicated grant management teams
- Data owners
- Appropriate-sized grants management teams in all field offices (1-4 people)
- Bake into onboarding
- Always have a secondary approver in case 1st is not available (speed decisions)
- Identify where roles and responsibilities are unclear
- Set approval deadlines (in absence of response implies approval)
- MC mentorship program
...Strengthen adaptive grant management by providing greater clarity of roles and responsibilities?

Facilities:

1. Life-sized digital day in the life of ____ changes every day at every office
2. Posted responsibilities and roles in every office
3. Create an interactive onboarding experience around doc/knowledge at MC
4. Well documented and understood Role Definitions
5. Library of SOPs or roles/responsibilities docs/templates
6. The person in charge gets a special hat or bandana
7. Budget for space to adapt
8. A limited choice of online forums which all program staff are added at the start of grant
9. Embrace "I don't know" pause
10. End-to-end system for grant management beyond GAIT links to other systems based on grant phase (e.g., closeout-retention of docs)
11. System that pulls up key task w/in award life cycle based on role assigned to the user
HOW MIGHT WE?

...Strengthen adaptive grant management by providing greater clarity of roles and responsibilities?

Events & Programs:

1. RACI events for every team/award
2. Celebrate best pivot
3. Require basic grant admin training for all involved
4. Standard process for recurring checking of grant/program team w/standard progress tracker assigned roles
5. ID grant related roles and have fun, virtual meeting once a quarter
6. Data tour
7. Embed approvals into systems
8. Publish standard roles and assignments
9. Create culture where “no” is OK if it is outside of defined role
10. Regional learning events
11. Kickoff module learning expectation (home for kickoff docs)
12. Encourage sharing of role or program frustrations – with the intent of turning the sessions into problem solving sessions
13. Close out communication automation
14. Grant performance recognition from CEO and field participants
15. Have program leaders hold team meetings that focus on growth or change management opportunities based on team on the ground insights
HOW MIGHT WE?

...Strengthen adaptive grant management by providing greater clarity of roles and responsibilities?

Technology & Data:

1. Mobile friendly learning flash cards (different languages)
2. Team working docs/field/desk shared file management
3. Digital tags that follow those who have a role with grant
4. Leverage virtual teams with global coverage
5. Apple watch notification
6. Mobile check-ID that map to project progress tracker so everyone knows what others are doing
7. Link learning to daily activities – baked in
8. Virtual asynchronous sharing
9. Webinars @ different times
10. Gamify learning
11. Create standardized roles and documented authority matrix
12. Greater intelligence on average time where/who grants sit with
13. Each country office has one projected in their office
14. Program teams-focused app to collect benefits/implementation data and stories

throughout implementation
1. Clarity around decision making criteria
2. The uniportal – holds all the financial, program, M and E data and has the dashboards to answer every question
3. Mercopedia – Wikipedia-like (crowdsourced) library of all projects (all stages of grand lifecycle
4. Data warehouse with kickass BI tools
5. Robust online portal
6. Software to pull and organize key data from reports and easily reachable
7. Mobile-enabled knowledge base
8. All system integration – not one death star
9. All MC software tools talk to each other or one source of info
10. Virtual spaces where people find info that is searchable on all programs
11. Dashboards show funding cliffs
12. Checklist from within the system
13. All org data and knowledge in the cloud accessible and usable
14. One enterprise system – end to end for grant admin – proposal to close w/performance
15. Integration into grants admin program that includes available UN, etc. contextual data
16. Have a single place where people could submit and find all docs
17. Integration of system data for common access
18. System that holds proposal, and once awarded feeds to other systems that will automate future admin and monitoring of key tasks
19. Clearer channels to share data analysis

1. Grant cycle mapping platform – embedded comms and adaptive fields for KM
2. Point of action data gathering and common repository
3. Grant reporting notifications for desk/field comms
4. Dashboard that takes data from various sources that will allow visualization for decision making
5. App to upload and access all docs related to programs and easily sharable
6. Record-specific conversations within the system – “chatter” in salesforce
7. Searchable system that allows for a library document to be presented, and can be further refined based on results
8. Improve searchable content in digital spaces
9. Reporting site that houses all reports (donor, financial)
10. Role-based work portal with personalized dashboard and resources
11. Informed support hotline for field programs staff (i.e. RPT)
12. Jaime-style person to chat with to connect programs, projects, etc.
13. Searchable reddit like board for answers to questions
14. Highly visible board to see where each grant is at in the lifecycle
15. Automate checklists/notification to program development team
HOW MIGHT WE?

...Strengthen adaptive grant management by providing greater clarity of roles and responsibilities?

Surprise:

1. Include task/delivery in performance reviews
2. PMs shadow another PM for a day or two to see how they work on a different project
3. Track report delivery of deliverables and completion of tasks
4. Measure and report out on grant admin performance
5. More space to fail
6. Dance party
7. Twister dots that have department info
8. Gamify roles – see who else shares qualities
9. Reduce approvals by empowering team members
10. Develop own avatar
11. “how to be a good approver” – get a comedian to film it
12. “yelp” where approvers are rated by spread decisiveness
HOW MIGHT WE...

Here’s a list of some of the “how might we” statements in action