



# Organizational Capability and Project Staffing

The Magi Group, LLC  
OPGS Grant Writing Class,

# Class Objectives



- To understand basic project management and planning
- To understand how to effectively complete a Management Capability Statement
- To understand how to complete a Statement of Organizational Capacity

# What Do We Plan?



- Plan the project work.
- Plan the resources and organization.
- Plan the money.
- Plan the information system.

# Project Planning “Frenemies”



Throughout the life of a project, a project manager has to seek a compromise between these conflicting goals

- Technical Performance (Scope - Quality)
- Cost Standards (Cost)
- Time Targets (Time)

# Organizational Capability



1. Describes the agency's accomplishments, track record, and characteristics.

AND

2. Describes how those qualities demonstrate that the agency is qualified to undertake the proposed project.



# Organizational Capability Components



- **Agency Mission** – why you exist
- **History of the Agency** – overview of when, where, why, and how the agency got started. Has focus changed over time?
- **Organizational Resources** – funding track record and human/material resources, particularly as it relates to project
- **Community Support and Recognition** – how agency is regarded, awards won, and the involvement of community in operations and programming of agency.
- **Interagency Collaborations and Linkages** – support available from other agencies, what they will specifically contribute, and how it relates to project.
- **Agency Program and Track Records** – quantitative overview of the programs and the effect of those programs
- **Agency Strengths** – description of what makes you particularly suited for the project

# Organizational Capability Supportive Documentation



- Letters of Support
- Memoranda of Understanding/Agreement
- Copies of Awards/Recognitions
- Newspaper/Web Articles
- Listing of Board of Directors and their affiliations
- Resumes
- Annual Reports
- Audited Statements
- 501(c)3 IRS Determination Letter



# Staffing Plan



Also called “Management Plan” or “Key Personnel”. They convey three primary things:

1. How you are going to staff your proposed project, i.e., what are the positions/titles that will be needed to perform the project;
2. Who are the personnel who will fill these positions — their names, qualifications, backgrounds, etc.; and
3. How you will recruit, train, supervise, and evaluate the project staff

# Staffing Plan (Identified)



- How important is staffing to the overall success of the project?
- What are the position descriptions/qualifications for each role on the project?
- Who are the key personnel?
- What level of effort will they contribute? (% of time)
- What roles/responsibilities will each position have? (provide a table or describe)
- What is the background of each key person (provide a biography/summary)
- How does the staff you have selected distinguish your firm and benefit the customer?
- How are skills mapped to project staffing?
- What depth of staffing is available within your organization?

# Staffing Plan (Not Identified)



- What is the job description
- How will you recruit new personnel if needed?
- How will new project staff be oriented/trained?
- What on-going training/skills enhancement will be provided to project staff?
- How will staff be supervised?
- What is your plan for retaining staff and achieving low turnover?
- How will staff performance be evaluated?
- How will replacement of staff be handled if necessary?
- Do you plan to hire any consumers/clients?
- Do you plan to hire any of the incumbent contractor's staff?

# Job/Position Descriptions

- Title
- Who the position reports to
- Date the position was created/amended
- Federal Labor Standards Act (FLSA) classification
  - White collar exempt (Salary level/salary basis/job duties)
- Purpose
- Duties
- Education
- Experience
- Approval/Receipt



# Resume Format



- **Bio** – Accomplishments and how they are a fit for the project
- **Experience** – work experience and accomplishments
- **Education** – academic schooling and professional training. (Dates attended, major, degrees conferred)
- **Skills** – additional training, certifications, etc
- **Activities** – demonstrate community involvement, familiarity with target, or desired participation (list time frames)
- **Awards** – awards conferred (list award bodies and title)
- **Memberships** – professional associations

# Keep In Mind



- Describe (in detail) the experience and qualification of the Project Director and key staff that will be involved in the project.
- Describe the roles and responsibilities of the staff (based on project activities) and how the project will be supervised.
- If allowed, include an organizational chart to show lines of accountability and your overall structure
- Mention your financial; record keeping, and MIS systems and the measures that are taken to manage and safeguard financial resources and sensitive information/records
- Describe organizational resources that will support the project

# Keep In Mind

- Describe collaborative partners and methods of communicating with them (if not included in the narrative)
- Establish how you will communicate to the funder and in what format (programmatic and financial)
- Describe how you maintain/sustain the project once funding has been exhausted. (it is not sufficient to say “We will look for additional funding”)
- It is not sufficient to just mention the numbers you serve, mention the outcomes and impact
- Highlight your methods of addressing cultural competency in detail



QUESTIONS?