



Grants Management System Training Strategy

Green Belt Project Report Out

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**Ohio Department of Mental Health
& Addiction Services**

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State Agency Context

- In SFY 2014 (July 1, 2013), the Ohio Department of Mental Health (ODMH) and Ohio Department of Alcohol and Drug Addiction Services (ODADAS) consolidated to form a single state agency – the Ohio Department of Mental Health and Addiction Services (OhioMHAS)
- Consolidation resulted in the tremendous undertaking of merging separate agency cultures, staff, office space, business functions, agency rules and grant-funding sources

Legacy Grant Systems

- ODMH and ODADAS had several grant management systems, business processes and grant funding sources
- In SFY 2014, use of the multiple existing grant processes from the previous agencies continued to be utilized while staff worked to merge as a new single state agency

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- Each of these legacy grant systems had been developed over the years to fit the needs of grant types, purposes and reporting requirements of the various funding sources (i.e. federal, state, local, private)

Previous systems included:

- OLGA
- Paper-based
- POPS
- Community Funding Database

Consolidation Efforts Continue

- As a single new state agency there was a recognized need to improve and standardize business processes
- One of many continuing efforts in the consolidation process was the initial effort of moving paper-based grant processes to an electronic format through the development of an IT application
- The first iteration was rolled out for use beginning with SFY 2016 (July 1, 2015)

Defining the Problem

- Consolidation of systems and grants processes resulted in new training needs that had not been well defined for the initial system that went live for SFY 2016 (July 1, 2015)
- With a new system and business processes being implemented in a short timeframe OhioMHAS Grant Project Lead staff and external stakeholders had not been afforded adequate training opportunities on the SFY2016 grant and allocation system which contributed to funding delays

Project Background

- During SFY 2016, further IT development began on a new, more streamlined single web application that would consolidate all these multiple systems and bring increased standardization to the grant application and funding process
- The new single application system is called the Grants & Funding Management System (GFMS)

Problem Definition

- It was identified that for the implementation of the new grant software application being developed for use starting SFY 2017 (July 1, 2016), a training schedule and communication plan had not been fully developed to address the same issues, concerns and user needs as the agency had encountered with the rollout of the initial system in SFY 2016
- This green project was chartered to better prepare staff for the transition to the new consolidated system, GFMS

Project Goals & Scope

- Develop and implement a training strategy that includes multiple opportunities for Project and Fiscal Lead staff to learn the new GFMS and new business requirements
- Implement a communication plan 
- Conduct a pre and post training employee survey to compare participation and satisfaction
- Analyze and compare Help Desk ticket data from corresponding time periods in SFY 2016 and SFY 2017

Lean Tools

- SIPOC
- Data Collection
- Surveys
- Brainstorming
- Voices
 - Business
 - Process
 - Employee
 - Customer



SIPOC

Suppliers

Federal, state and local funding sources
Program administrators
Fiscal administrators
Information Services

Inputs

Federal, state and local funds
GFMS application development
Training plan
Communication plan
Program and fiscal policies
Staff survey
Help desk ticket data
Time
Training locations

Process

Research and analyze training needs
Development of training and communication process quality improvement plans
Implementation of training and communication plans

Outputs

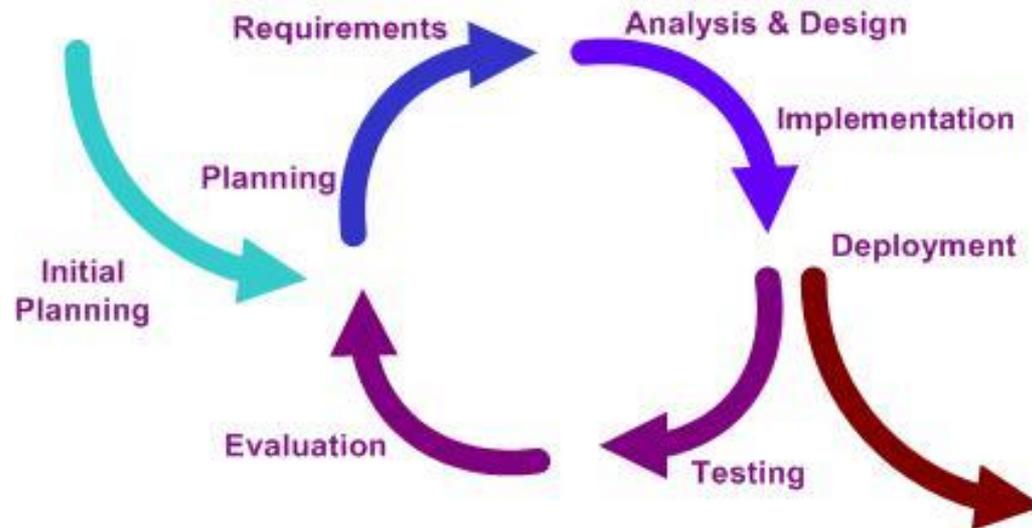
Provide training opportunities
User resource materials

Customers

Ohioans served by grant and allocation funds
Project leads
Fiscal staff
ADAMH Boards
BH services providers
Other entities that apply for funding
SAMHSA and other government entities

Participation in the Agile Software Development Process

To enhance our understanding of GFMS system development and assess potential specific training hot spots, we also participated in the IT developers' daily agile "stand-ups."



Quality Improvement Measures

- Help Desk ticket analysis of the previous OLGA, POPS and Community Funding grant systems over sample period 7/1/15 – 9/1/15 compared to the newly implemented GFMS over sample period 7/1/16 – 9/1/16
- OhioMHAS employee surveys of SFY 2016 & SFY 2017 funding system training process to identify training needs, training preferences and trainee satisfaction

OhioMHAS Help Desk Snapshot

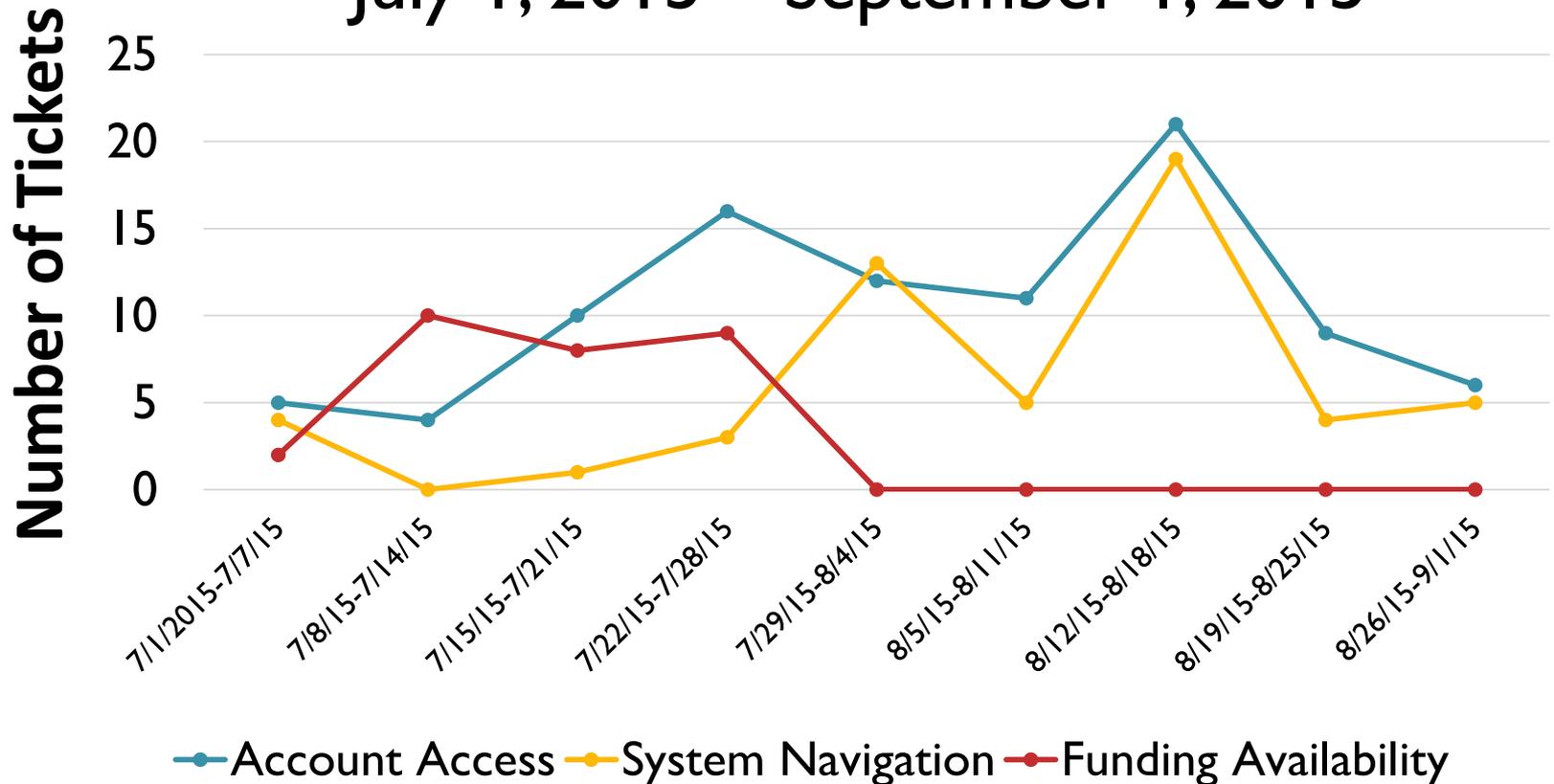
“What is the average volume of all tickets received by the Help Desk? “

January 1, 2015 to November 30, 2015:

- 13,019 tickets received
- An average of 1,085 tickets received monthly
- An average of 250 tickets weekly

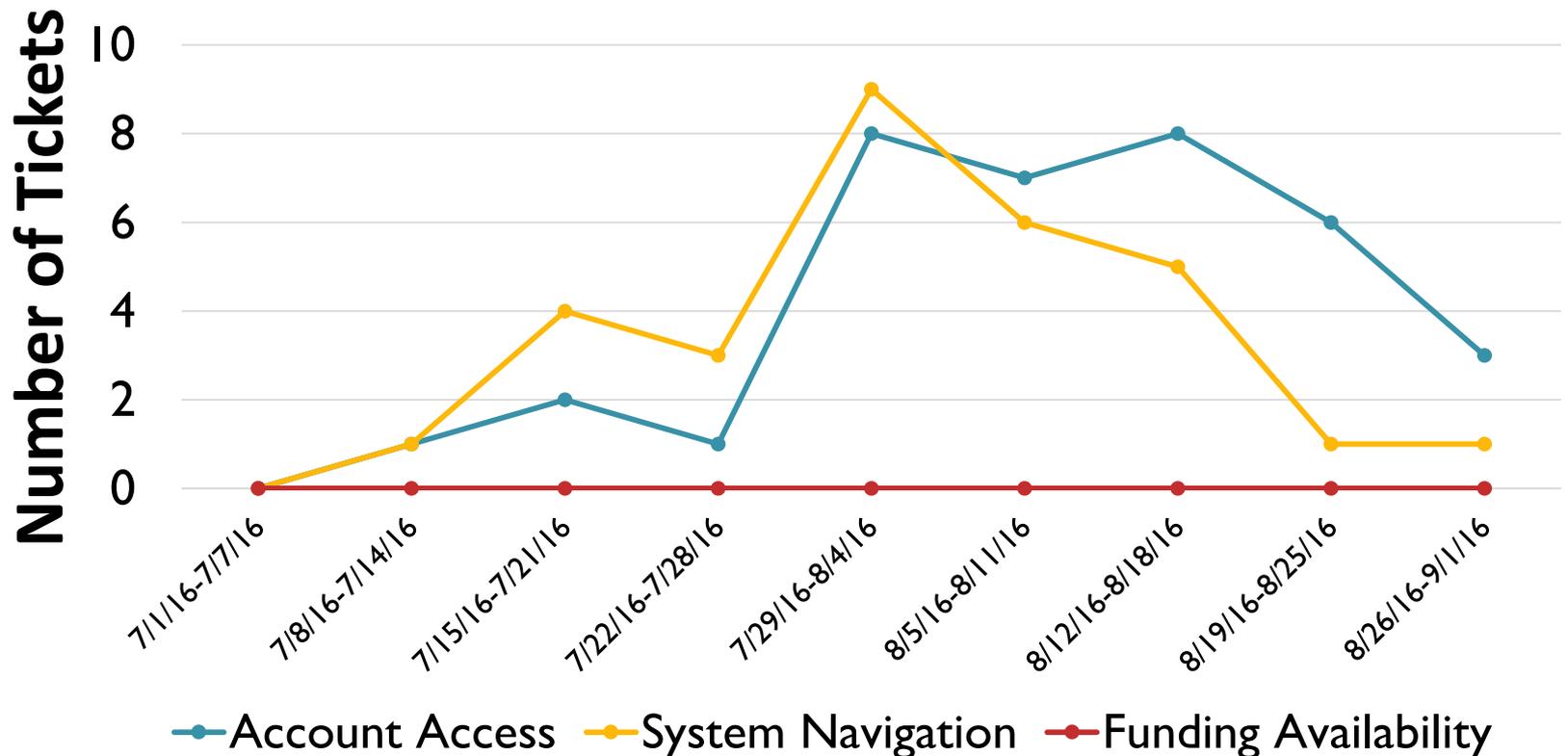
Help Desk Baseline Data

Help Desk Tickets for OLGA, POPS
and Community Funding Database
July 1, 2015 – September 1, 2015



Help Desk Baseline Data

Help Desk Tickets for the Grants and Funding Management System (GFMS)
July 1, 2016 – September 1, 2016



Help Desk Ticket Analysis

Pre/Post Training

- Account access questions
 - **39% decrease**
- System navigation questions
 - **55% decrease**
- Funding availability questions
 - **Zero questions post-training**

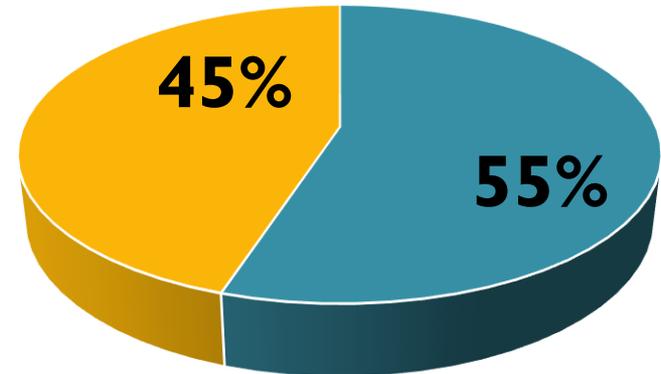
Employee Training Surveys

- In March 2016, OhioMHAS Project Lead staff participated in a survey to ascertain the degree of satisfaction with grant system training opportunities prior to SFY 2016.
- In September 2016, after the GFMS hands-on computer lab training cohort sessions, staff again participated in a follow-up survey on their experience with grant system training opportunities to prepare for SFY 2017.

Pre & Post Training Study Results

Pre-Training Plan Survey:

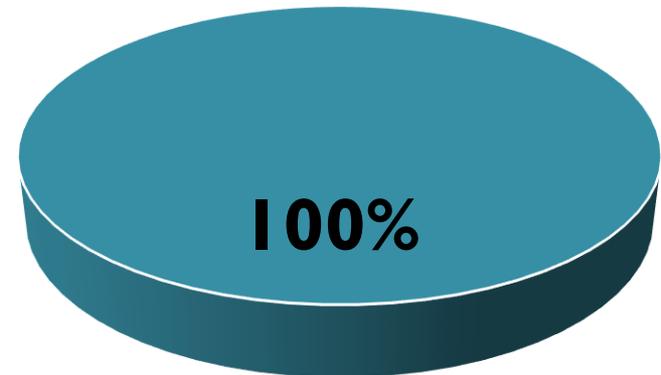
Did you receive training for the current Online Grants Application (OLGA), Community Funding or POPS systems?



■ Yes ■ No

Post-Training Plan Survey:

Did you receive training on the new Grants & Funding Management System (GFMS)?

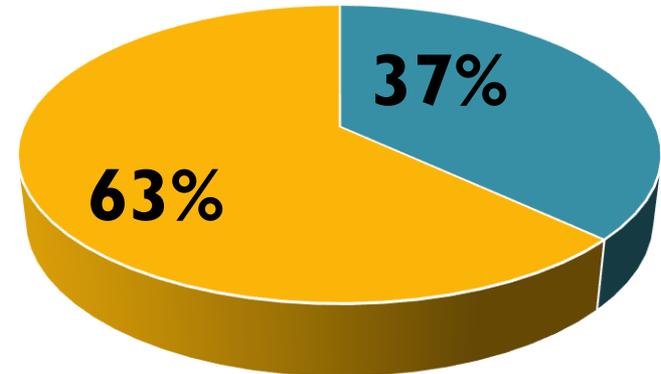


■ Yes ■ No

Pre & Post Training Study Results

Pre-Training Plan Survey:

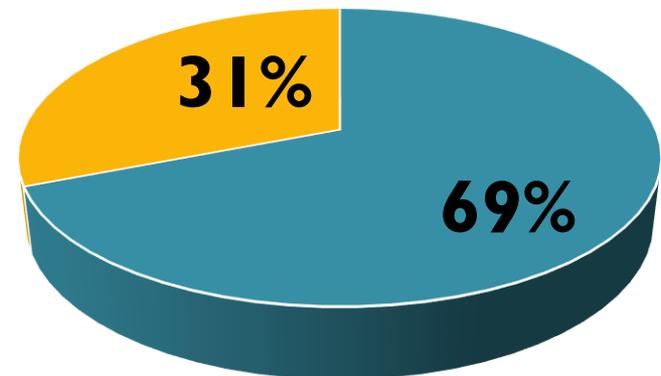
Did you receive adequate/timely notice about when the training was offered?



■ Yes ■ No

Post-Training Plan Survey:

Did you receive adequate/timely notice about when the training was offered?

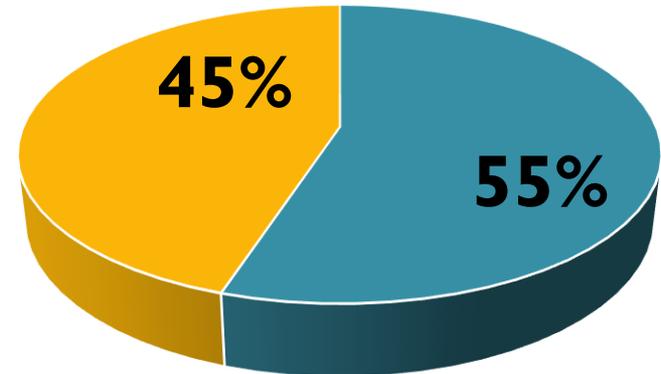


■ Yes ■ No

Pre & Post Training Study Results

Pre-Training Plan Survey:

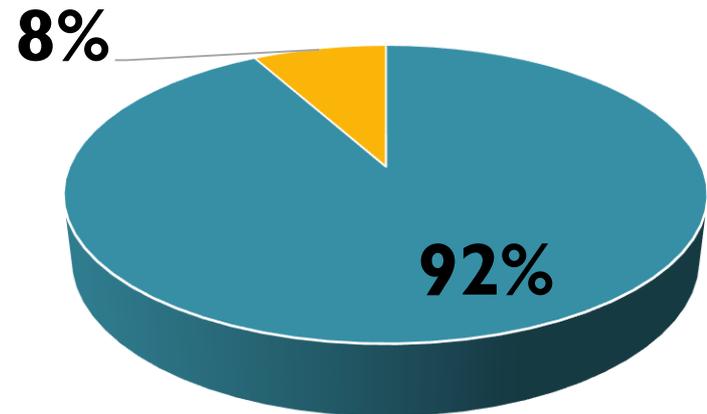
Was the training offered at a time you could attend?



■ Yes ■ No

Post-Training Plan Survey:

Was the training offered at a time you could attend?

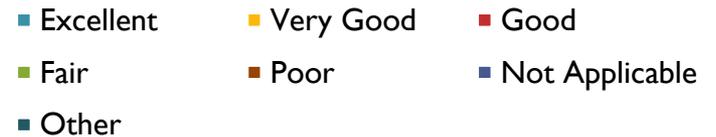
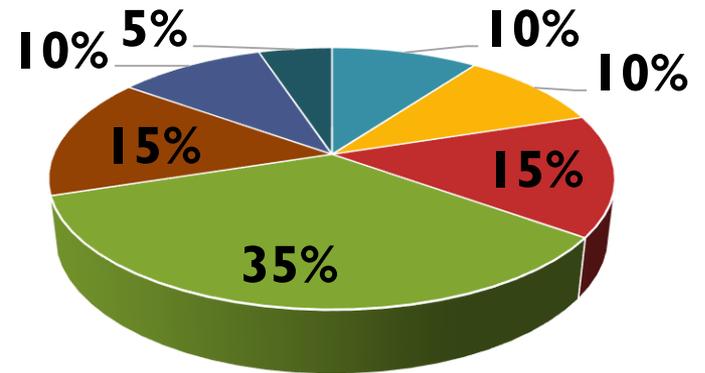


■ Yes ■ No

Pre & Post Training Study Results

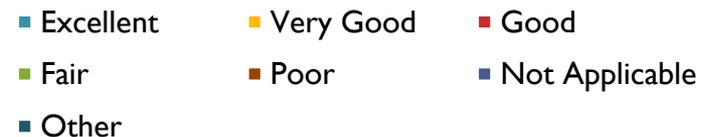
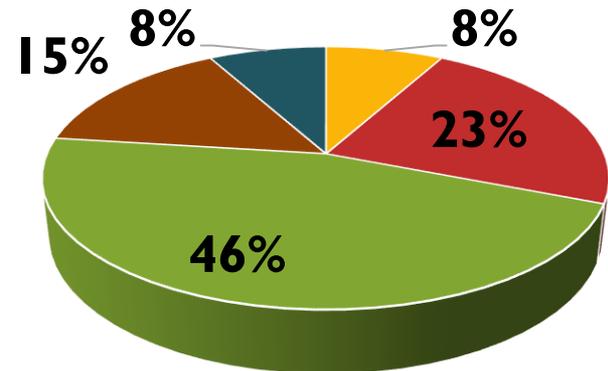
Pre-Training Plan Survey:

If you attended a training session, how well did the training prepare you for administering your program in the OLGA, Community Funding and/or POPS systems?



Post-Training Plan Survey:

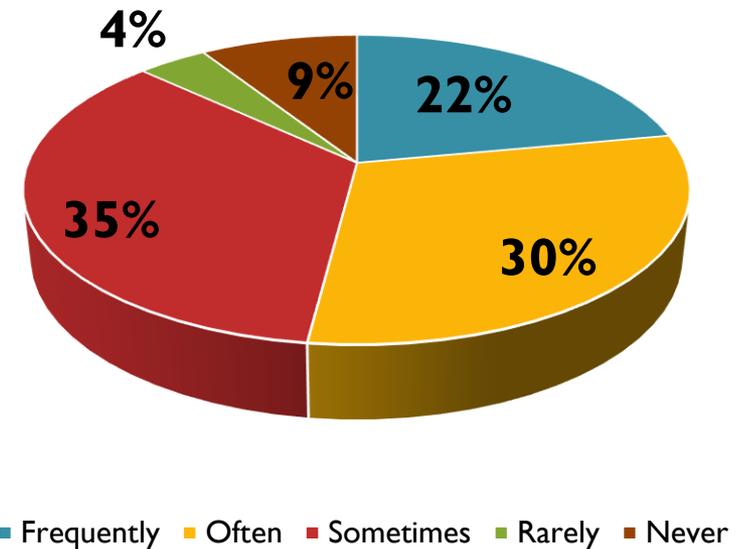
If you attended a training session, how well did the training prepare you for administering your program in GFMS?



Pre & Post Training Study Results

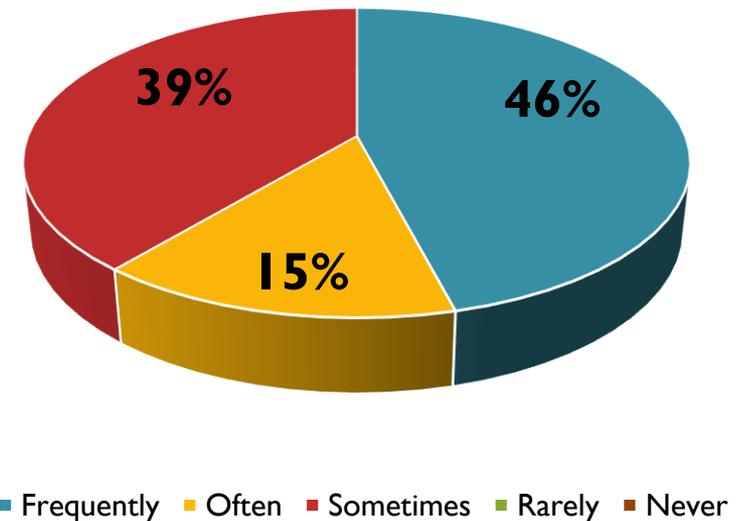
Pre-Training Plan Survey:

In the past 6 months, did you have system access, navigation or process questions related to OLGA, Community Funding and/or POPS systems, and if so, how often did you find yourself having questions?



Post-Training Plan Survey:

In the past month, did you have system access, navigation or process questions related to GFMS, and if so, how often did you find yourself having questions?



Internal Training Strategy & Learning Opportunities

Access to GFMS Test Website

- Staff were provided access to the GFMS test website and encouraged to enter test data to learn the system

In-Person GFMS Computer Lab Sessions

- 4 program-specific training sessions with value-added production environment data entry opportunities

Make-Up Sessions & Open Door Computer Lab

- 9 total training opportunities provided

Total Number of Internal Staff Trained:

49

External Training Strategy & Learning Opportunities

System Demonstrations for Boards, Providers and Other Interested Parties

- External grant and allocation stakeholders had 2 opportunities to view demos of GFMS at the Ohio Department of Transportation Auditorium with Q & A opportunities with OhioMHAS staff
- One demo session recorded and posted to the web
- Step-by-step screenshot reference guides were created for applicants on how to apply for funding in GFMS

Total Number of Stakeholders Trained:

396

Sustaining the Gains

Recommend employing Lean principles of Standard Work to support quality of communication and funding process expectations going forward, i.e.:

- Benchmarking
- Time Observation Sheets
- Takt Time

Lessons Learned

- Lean your business process and align policies prior to hard coding computer programming
- System development and testing require time and does not necessarily fit neatly into State Fiscal Year deadlines
- Agency culture and historical business processes are difficult to change
- Project scope creep

Do not let fear clog your mind or have you wring your hands... *Change* is the engine of *growth*. *Change* is the engine of *renewal*. *Change* is the engine of *progress*.

Governor John Kasich

LEAN **Ohio**



Special Thanks

- James Lapczynski – Process Owner
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