



Community Health Care Services Foundation, Inc.

*the premier educational resource
for home care and hospice*

inside:

- **Checklist for grant success**

Grant readiness: it's a wise investment for 2009

By Linda Gatten Butler

F executives and board members of organizations that do not have established grant departments often erroneously view grant seeking as an activity limited to proposal writing. A competent grant professional's role is to assess the organization's grant-readiness and actively get involved in organizational development activities that pertain to grant seeking.

The Grant Professionals Certification Institute (GPCI) identifies "knowledge of organizational development as it pertains to grant seeking" as a validated measurable competency and skill for a grant professional. There are two essential components of this competency:

- Assessing the organization's capacity for grant seeking and readiness to obtain funding for implementation of specific projects.
- Identifying methods for assisting organizations to implement practices that advance grant-readiness.

A treasure trove of education

Home care agencies—especially in New York but around the country as well—have come to rely on CHC for high-quality education and training tailored specifically to the needs of industry administrators, executives, clinicians and paraprofessionals. Programs are presented in a variety of formats—onsite, webinar, audio conference and streaming video—to meet the

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Assessing organizational capacity

Grant seeking is often misunderstood as the limited activity of writing a proposal to get funds for the organization or for a specific project. While this is a crucial step, the grant professional's role is to educate the board and executives about the "3 Rs of grant seeking" in this priority: **R**elationships (i.e., contacts and opportunities); **R**esearch (i.e., geography and fit with funder) and **wR**iting of the proposal (i.e., writing skills).

Grant seeking, implementation and management is a targeted process that involves planning, researching, cultivating relationships, fundraising principles and monitoring.

The "Checklist For Success" shown here (adapted from an article published in the *Journal of the American Association of Grant Professionals*), can be an important tool in assessing the grant-readiness of an organization. Grant-readiness may vary from funder to funder and project to project. In assessing the organization's readiness to obtain funding and implement specific projects, several additional factors should be considered:

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- organizational priority;
- project ownership;
- organizational readiness to undertake the project;
- funder's priorities;
- and a sound evaluation and sustainability plan.

Advancing grant readiness

The grant professional not only manages the project development process, but also advances the grant-readiness of the organization by implementing methods that support and strengthen the organization's capacity to apply for and secure grant funds. Some key strategies are:

- Educate the staff and administration about the grants process.
- Develop an annual grants agenda that aligns with organizational planning.
- Conduct ongoing funder stewardship and cultivation.

The grant professional must assess an organization's preparedness to seek, implement, and manage grants and to implement practices that advance its readiness. While the "Checklist For Success" is a good starting point, grant-readiness may vary. Therefore, the grant professional, working with other key players, has the ongoing responsibility of assessing each project's applicability and readiness to obtain grant funding. Alignment of the organization's annual grants agenda to the institutional plans and priorities, education of the administration and staff about the grants process, and cultivation of funders are wise investments in 2009 to advance any organization's grant readiness.

Linda Gatten Butler, MSW, ACSW, LISW, is President of Butler Consulting, Inc. (www.butler-consulting.com), a Springfield, OH-based grant seeking, fundraising and management consulting firm.

Checklist for success

Collect the following information in multiple copies (or electronic pdf files). When you receive a Request for Proposal (RFP) on Monday that is due Friday, you can be "grant-ready" and make the deadline!

- Brochures, agency publications, newsletters, Annual Report.
- Employer Identification Number (EIN)/ tax ID #, Data Universal Numbering System (DUNS) # and National Information Management System (NIMS) registration.
- 501(c)(3) determination letter from the IRS (and renewals and updates).
- List of partners, collaborators, subcontractors.
- Evaluation, outcomes, performance measures.
- Future funding statement for sustainability (including list of pending proposals and/or awarded grants).
- History of organization including year established, programs, mission, values/philosophy, awards, stories/testimonials, accreditations/certifications.
- List of Board of Directors/Trustees members and officers, titles, affiliations, contact information.
- List of management staff, contact information; resumes and/or job descriptions of current and proposed staff.
- Map of target area and demographics of those served.
- Minutes of Board meetings/resolutions for past year.
- Most recent audit and financial statement.
- Current Fund Development Plan, Strategic Plan and Business Plan.
- Table of Organization/flow-chart.
- Current project and organization budgets with budget narratives.
- Recent newspaper clippings, evaluations or reviews.
- Sample letters of support/commitment.
- Target population, demographics & needs ("best-practice models" or "evidence-based").
- Mission and vision statements.
- Certificate of Incorporation and Bylaws.
- New 990 Form information re: governance and fundraising (effective 5/09; www.IRS.gov/eo).
- www.grants.gov registration for all Federal grants (Central Contractor Registration needs renewal annually).

Note the format and content of each funder's application guidelines and remember the Golden Rule: *Whoever Has The Gold Makes The Rules.*

A treasure trove . . .

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different needs of varied audiences and several programs are held each month throughout the year. But many home care professionals responsible for the education and training of staff are not fully aware of the vast number and variety of programs available to them at the time of their own choosing by purchase of CDs or video seminars.

CHC's well-known Home Care Community Forum is geared toward paraprofessionals with audio conferences and accompanying workbooks now available on more than 40 different topics including "Corporate Compliance for the Home Care Worker," "Paraprofessionals and Wound Care," and "Basic Life Skills for Paraprofessionals." Six new Forum audio conferences are produced each year and the original broadcast is available at no charge. The two most recent audio conferences can be downloaded at no charge and any topic can be purchased on CD at a modest fee. All workbooks are available for download at no charge. Full details on the Forum can be found at www.chcforum.org/forum. Emergency preparedness training for paraprofessionals and volunteers is also available at no charge and offered in video as well as audio files plus workbooks at www.chcforum.org/prepare.

Through its partnership with the Home Care Information Network (HCIN), CHC offers Internet video seminars that can be accessed at any time from anywhere and can be viewed again and again. As with all CHC programs, all HCIN programs are specifically developed for the home care industry. Current topics include "Strategic Planning for Home Care Agencies," "The New Keys to OASIS Success," and "Home Care Sales Skills."

CHC webinars have included a variety of topics of interest to clinicians and home care executives in finance, marketing or administration. Topics such as "Home Care Marketing on A Shoestring Budget," "Crossing the Line: Clinician to Manager," and "Helping Clients Understand Private Pay Options" are all available on CD and can be found at www.chcforum.org/seminars/cd.

The following article by Laura E. Peterson is an excerpt from her recent CHC webinar on Medication Management. The complete program, and other like it, are available on CD for a small fee at The HCP Shoppe at www.nyshcp.org, the Web site of CHC's affiliate The New York State Association of Health Care Providers, Inc. (HCP). In addition to CHC programs, The HCP Shoppe has a variety of business and marketing books and other merchandise..

Medication reconciliation: first step to improved medication management

By Laura E. Peterson

Medication management is a critical component for any home care agency. Older patients with chronic conditions and comorbidities are taking increasing numbers of medications, often prescribed by several different physicians. The number of medications and the complexity of the regimen can lead to significant medication errors. Therefore, among the most important protocols for any medication management program is the process of "Medication Reconciliation"—comparing a patient's medication orders to all of the medications the patient has been taking.

Medication use among older persons is growing rapidly. Over 90% of persons 65+ use at least one medication (including prescription and over-the-counter drugs), and about 15% use 10 or more. Use is even higher in older home care patients

The potential for adverse drug events exponentially increases with the

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community health care services foundation, inc.

Upcoming educational events

Forum #42: Chronic Kidney Disease & Caring for the Dialysis Patient

March 12, 2009

Audio Conference

Surviving Surveys

April 1, 2009

Onsite Program

Rochester, NY

CHRC 101 & Live Scan Electronic Fingerprinting Training

April 21, 2009

Onsite Program, Plainview (Long Island)

April 22, 2009

Onsite Program, Manhattan

Please Note: this program will be held several times around New York State during 2009. See Web site for dates and locations.

To register for an event, visit www.chcforum.org/seminars or call 518/463-1167, ext. 802



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number of medications. Home care patients taking nine or more medications may have a risk of over 30% of having an adverse medication event.

Medication reconciliation: a patient safety requirement

Medication reconciliation is the process of obtaining and maintaining an accurate list of all prescription and non-prescription medications a patient is taking—including name, dosage, frequency, and route—throughout the entire health encounter. The medication reconciliation process for home care has three basic steps:

- **Verify** - Collect an accurate list of all medications that the patient is currently taking including over-the-counter drugs, dietary supplements and vitamins. Specifically ask about the use of non-prescription medications; patients often do not consider such things to be “medications.”
- **Clarify** - Clarify any questions about drug/dose/ frequency. Then, identify combinations that may be contraindicated, including drug interactions and therapeutic duplication (two or more medications from the same chemical family or therapeutic class). Also review the list for medications that may be inappropriate for older patients.
- **Reconcile** - Communicate with the physician about any identified medication questions or concerns.

Medication reconciliation is not just a requirement to be met. It is a real opportunity to improve medication management for our older home care patients.

Laura E. Peterson, BSN, SM, is a health care consultant and senior faculty for the CHAMP Geriatric Medication Management program.



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