

FIRST NATIONS
DEVELOPMENT INSTITUTE

CALIFORNIA
TRIBAL FUND

insights & bites



September 2025 - July 2026

The California Tribal Fund will be hosting 6 webinars over the course of a year. Each session will go over different topics to support grantees overall learning and growth.

OUR TEAM



REBECCA TORTES

Director

Cahuilla, Payómkawichum,
and Assiniboine Sioux



DONALD SALCEDO

Lead Program Officer

Quechan Nation/ Pueblo of
Laguna



ELLA KOHLER

Program Officer

Sac & Fox

MISSION & VISION



Our mission is to invest in the viability and visibility of California Tribal Nations and communities.



We envision a future where California Native People — here since time immemorial — have authority over our homelands and honor our responsibility to our people, language and traditions to ensure our communities are recognized, strengthened and sustained.



OUR PROGRAM AREAS



Stewardship of Ancestral Lands & Waters

Rebecca Tortes



Youth & Culture

Donald Salcedo



Wildfire Relief & Climate Action

Rebecca Tortes



Food Sovereignty

Ella Kohler

WEBINAR SCHEDULE



01

Strategic Planning 101

➤ *September 17, 2025*

John Hendrix

02

Building Sustainable Funding

➤ *November 13, 2025*

Kimberly Miyazawa Frank

03

Tools & Strategies for Project Management Success

➤ *January 28th, 2026*

CTF Team

04

Community Engagement & Outreach

➤ *April 2026*

05

Avoiding Burnout

➤ *May 2026*

06

Grantee Stories

➤ *July 2026*

WHY THESE TOPICS?



Project management:

- Interviewees elaborated on challenges with **managing** and grants given limited staff time and capacity.
- Respondents reported that staff turnover hinders program implementation and service delivery.

The overarching aim of this project was to conduct a relational-based, rigorous, and systematic community assessment with First Nations Development Institute's California Tribal Fund and grantee partners to better serve California Tribal communities through improved grantmaking.



Our Team



Rebecca Tortes is the co-founder and Director of the California Tribal Fund, the first-ever California tribal serving, California tribal controlled, and led, statewide philanthropic fund. She has worked with California tribal populations for over 25 years. Before establishing the California Tribal Fund, she served as the Executive Director for the California Indian Basketweavers Association (CIBA), a statewide nonprofit working to preserve, promote, and perpetuate California Indian basketweaving traditions. In addition, she has served as a tribal administrator, development manager, grant writer, and community liaison for several California-based tribes and tribal nonprofits.

Donald Salcedo has served the California Indian community for over a decade, both urban and rural, in the fields of social welfare, community outreach, and mental health.

Ella Kohler has worked for CTF for over a year now. She has a background working with Native student outreach and retention programs during her undergrad. She helped to develop programming for native student wellness and academic success. As well as evaluated projects and advocated for funding within her leadership role.

LEARNING OBJECTIVES



Identify and understand the phases & common challenges in project management.



Apply best practices and effective methods for data collection, surveying and analysis.



Utilize accessible online tools, resources, and strategies to support organizational readiness.



FOR TODAY



- Please turn on your camera
- Prepare to engage and participate
- Type questions in the chat or un-mute and ask them
- Slides and resources will be made available

POLL



Do you have project management guidelines?

- A. Yes
- B. No
- C. Unsure



What is the biggest project management challenge you face right now?

- A. Managing multiple grants or funding requirements
- B. Staff capacity or turnover
- C. Tracking timeline, tasks, and deliverables
- D. Communication across teams or partners



How confident do you feel managing current projects?

- A. On a scale of 1-5 (1= Not confident, 5 = Super confident!)





What is Project Management?

Project Management is the application of specific knowledge, skills, methodologies, and techniques to achieve specific and measurable project goals, including successful project completion.

Project Manager: The person authorized by the performing organization to lead the team or teams responsible for achieving project objectives.



Challenges of Project Management

Common challenges: Time, scope, communication, and resources.

Specific challenges heard from grantees also include:

- Limited administrative capacity
- Wearing multiple hats
- Managing reporting deadlines alongside program delivery

Effects of poor Project Management:

- Missed deadlines
- Cost over or under spending
- Poor quality
- Uncontrolled "scope creep"
- Unsatisfied stakeholders



Core Phases of Project Management

Initiation: community need, feasibility, identify stakeholders

Planning: goals, scope, timeline, roles & responsibilities

Execution: task management, communication, accountability

Monitoring: tracking progress, problem-solving, adjustments

Closing: evaluation, documentation, and lessons learned

Q: What do you do to plan?



Phase 1: Initiation

Initiation: community needs, feasibility, and identify stakeholders

1. What is the overall vision? – Does it align with mission, values or strategic plan?
2. Identify the need for the project from the community
3. Feasibility of timeline and budget
4. Who are your stakeholders? (staff, board, volunteers, partners, funders)



Phase 2: Planning

Planning: project kickoff, goals, scope, timeline, roles & responsibilities

1. What is the goal?- How does it align with mission, values or strategic plan?
2. Scope – boundaries of the projects (what's in vs. out)
3. What are the most important timelines?
 - Project start and end date
 - Reporting
4. Communicate clearly the roles and responsibilities



Phase 2: Planning- Project Kickoff

Project Kickoff Meeting: first gathering of a project team and stakeholders to align on goals, scope, roles, and communication plans.

Set expectations!



Phase 2: Planning - Project Kickoff

Kick-off mtg: January 28, 2026 | 1:00pm–2:30pm PST

Project Name: 2024-2029 CA Tribal Fund Support

Programs: CTF,

CTF Project Lead: Rebecca Tortes

Grant Period: 1/1/2026 - 6/30/2029

Spend Down Deadline: 3/30 of each year for annual spenddown. Final Spend down 3/30/2029

Reports: Please read report notes in the award agreement. The following dates have been assigned by development:

- Interim Year 1: 12/31/2027
- Interim Year 2: 12/31/2028

1. Funding Source(s):

Funding sources	Finance Project Code	Funder Grant # (if any)	Amount	Additional comments
Generic Foundation -CTF Support				An internal 5 –year budget should be developed
Total Project Budget			\$\$	



Phase 2: Planning: An Approach Outline

- Step 1: Kick-off meeting with Key Stakeholders to Define Scope & Standards
- Step 2: Develop a Project Schedule to Include Monitoring & Control
- Step 3: Develop a Communications Plan
- Step 4: Implement Project
- Step 5: Hold Recurring Meetings, Monitor Progress, and Adjust As-Needed
- Step 6: Formal Project Close-out
- Step 7: Review and Celebrate



Phase 3: Execution

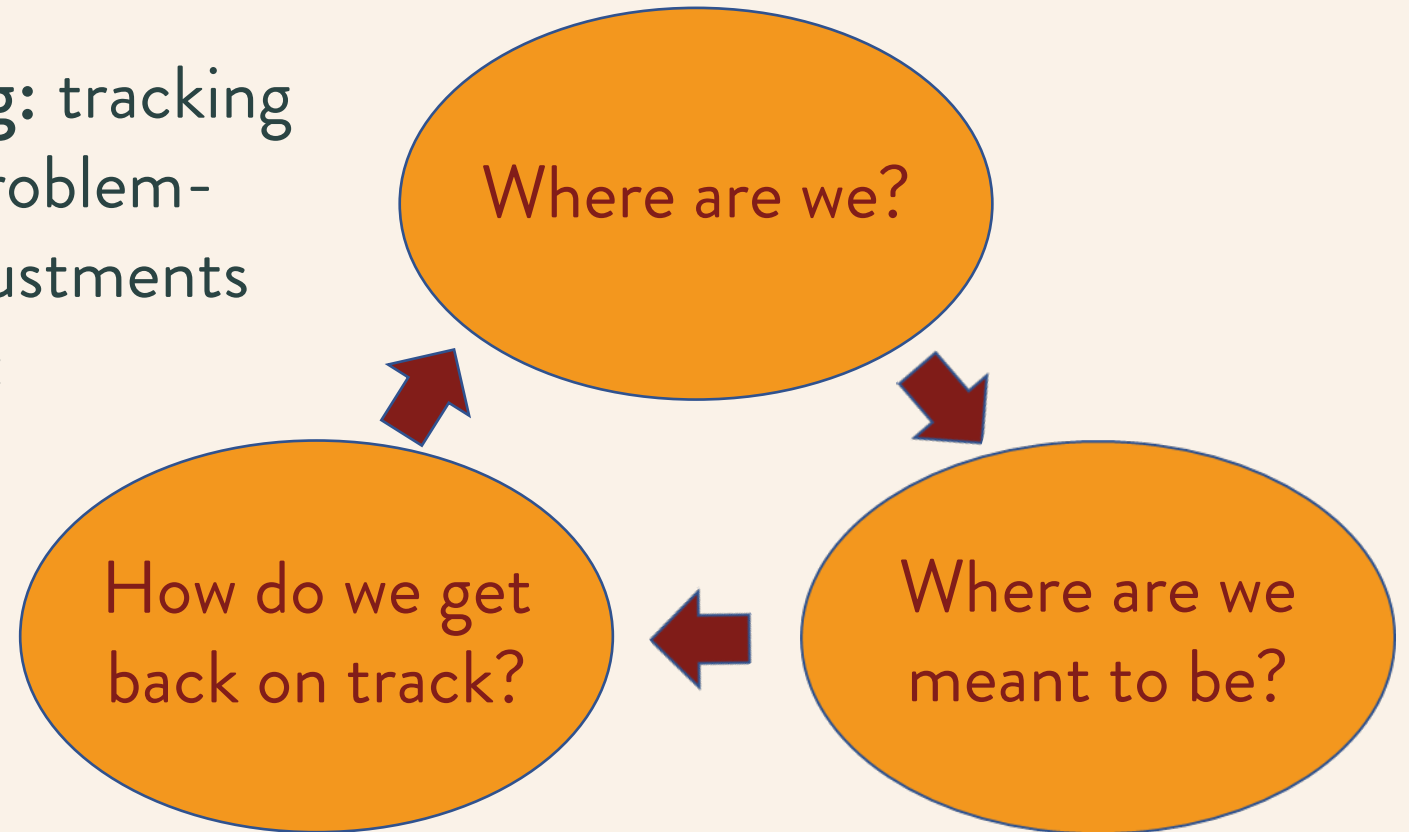
Execution: task management, communication, accountability

1. Delegate tasks effectively
2. Empower your team!- Be open to new ideas & suggestions
3. Manage communication – progress, meetings, check-ins
4. Hold yourself and the team accountable



Phase 4: Monitoring

Monitoring: tracking progress, problem-solving, adjustments
Challenges:





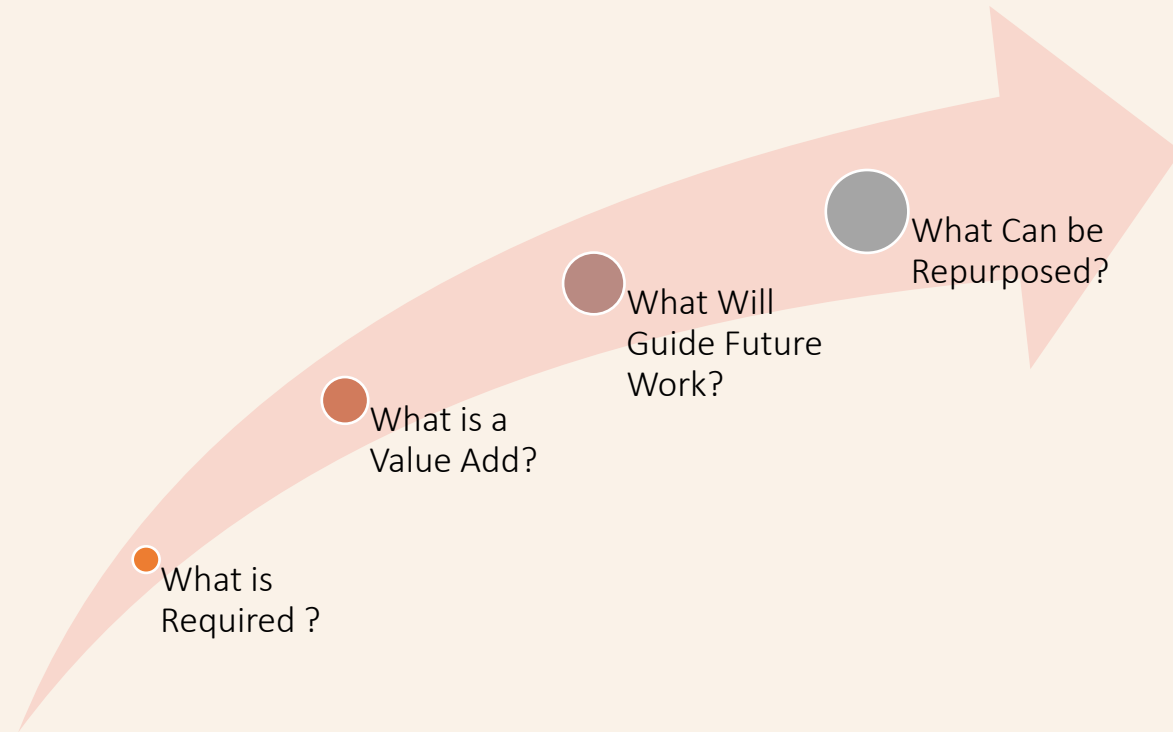
Phase 5: Closing

Closing: evaluation, documentation & lessons learned

1. Finalize agreements & payments
2. Facilitate a lessons learned meeting (+ & -)
3. Archive project materials
4. Conduct a survey or review results
5. Write a summary report
6. Celebrate completion!



Data Collection – A Continuous Stream





Data Collection, Survey, & Analysis

Problem Definition Data

- Statistics on the prevalence of an issue.

Solution Data

- Internal metrics on previous projects.
- Estimates based on evaluation and assessment.

Financial Data

- Cost-benefit analysis.
- Social economic benefits beyond program.

Credibility Data

- Third party statistics

Tools & Strategies for Organization

➤ Online Tools for Managing

\$ No-cost, low-cost, high-cost

➤ Tips for:

 Prioritizing Tasks

 Managing Time

 Productivity Strategies



Online Tools

Program Type	Commonly Used For	Examples
Word Processor	Compose, edit, format docs	Word, Google Docs
Spreadsheet	Format rows & columns for calculations	Excel, Google Sheets
Database	Store data & Create info.	Access, Smartsheet, Airtable
Email Client	Send, receive & store email	Outlook, Gmail
Task Manager	Tracking &/or assigning tasks	Outlook, Todoist, Notion
Calendar	Scheduling & monitoring events & activities	Outlook, Google Calendar, Zoom, Calendly
Scheduling/Gantt Charts	Create & track project schedules	Asana, Tom's Planner
File Storage	Store & organize digital files	Drive, Dropbox, Box
Digital Notebook	Store digital info from wide range of formats	Notion, Obsidian, One Note
Team Collaboration	Help teams work together more efficiently	Asana, Zoho Projects, Airtable



Online Tools

Program Type	Commonly Used For	Examples
Comms/Marketing	Create flyers, presentations, posts, newsletters, building websites, etc	Canva, Square Space, Word Press

Are there any other project management tools that you use?

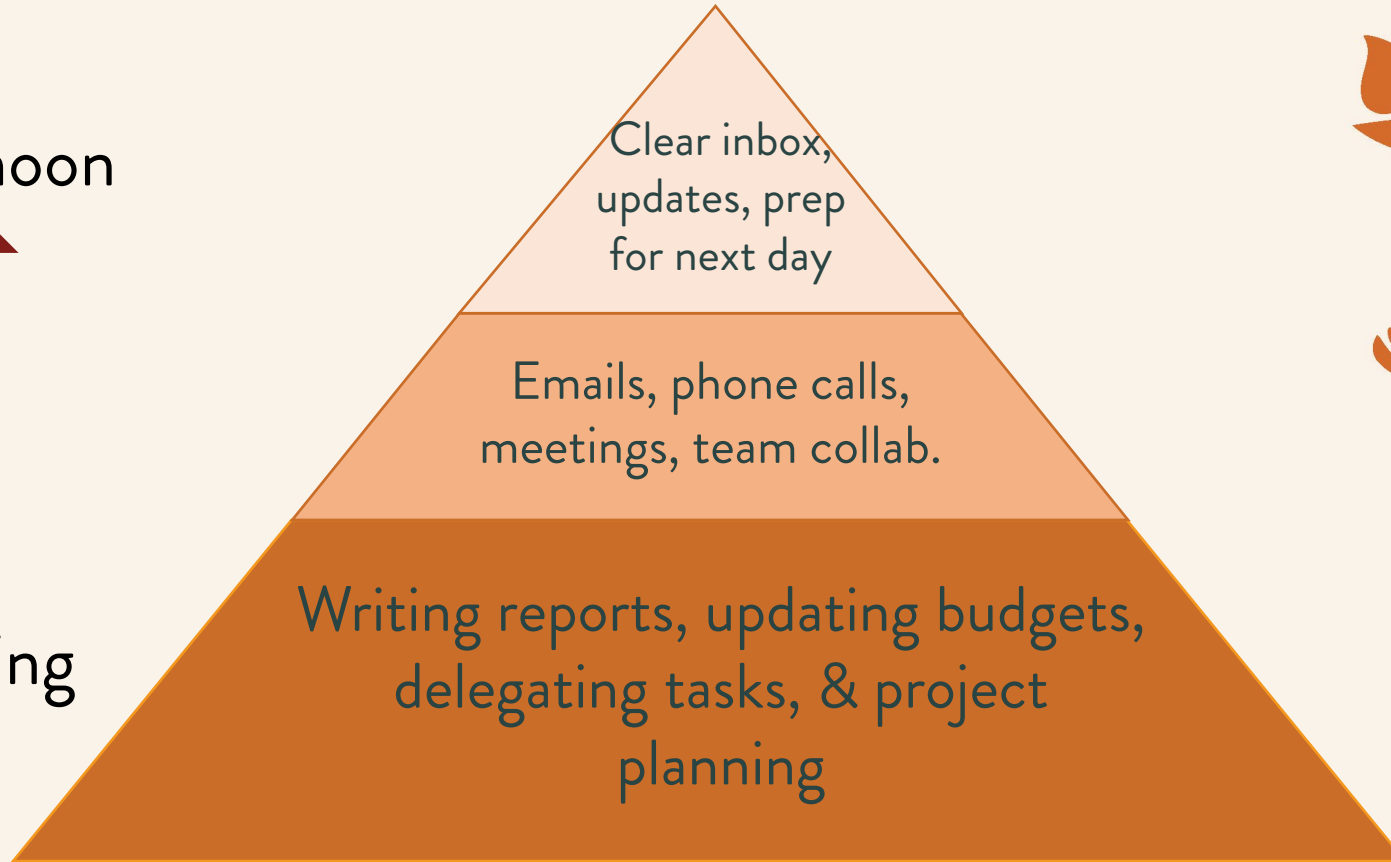


Tips for Prioritizing Tasks

Afternoon



Morning



Work on “Heavier-lift” tasks early in the day and “lighter-lifts” later in the day



Time Management Tips

Daily Tasks

- ✓ Respond to all emails
- ✓ Clear Inbox
- ✓ Return all phone calls
- ✓ Make a to-do list

Weekly Tasks

- ✓ Review, sign, & return all pending docs.
- ✓ Update Project Status
- ✓ Archive Files
- ✓ Organize desk/supplies
- ✓ Update & review schedule for next week

Monthly Tasks

- ✓ Update all Project Status
- ✓ Update budget (actuals)
- ✓ Update budget (forecast)
- ✓ Make pending decisions
- ✓ Archive files
- ✓ Review plan for the month



Productivity Techniques



Pomodoro Technique

- Set a timer and work on task for 25 min then a 5 min break



Time Blocking

- Set specific time aside on calendar to work on task



Batch Tasks

- Group similar tasks together to reduce switching costs



RESOURCES

➤ All of us

- Please reach out to First Nations, to me, and to each other!

➤ Websites/ Books/ Podcast

- Project Management Institute- <https://www.pmi.org/>
- *Good to Great* by Jim Collins
- *Project Management Happy Hour*, Kim Essendrup & Kate Anderson

➤ Templates

- Project Scoping Document
- “Walk-Back” Calendar
- Kick-Off Meeting Agenda



QUESTIONS + ANSWERS



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THANK YOU

We look forward to seeing you at our next webinar in April!



The recording of this webinar will be posted on First Nations' website under "Knowledge Center"



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