



Workplan Information Management

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About Us

- Dedicated firm of historical researchers (and negotiators) with 30+ years experience in Specific Claims
- Work with 3+ TARR programs
- In addition, we work on behalf of numerous individual First Nations

How we manage “our” Claims

- Track everything by program and First Nation in Excel
- Track stages of research for a given FY and progress achieved in that period
- Sort/filer by program and/or First Nation to generate our proposals and annual reporting

Our Excel Headings

Internal Info			Work Plan/Reporting Information				
Researcher	Program (Billing Code if applicable)	Project Code	First Nation	Description of Claim	Stage of Research 2023-2024 (April 1, 2022 - March 31, 2023)	Research/Activities to be completed in 2023-2024 (Deliverables/ Outcome/ Timeframe)	Notes
▼	▼	▼	▼	▼	▼	▼	▼

Drop down arrow indicates this column can be sorted/filtered

- We blend our firm needs to track information to provide each of our clients with periodic activity reports with funders' work plan template information
- Can easily filter information at a moments notice if I get a call out of the blue
- Can easily generate work plan proposals, or annual activity reports out and map to funders' own templates.

Next Steps

- I know Excel is an extremely powerful data management tool – I still don't know everything about it
- Funders have migrated from Word to Excel – a welcome switch from an information management perspective
- Working Group can create a tool that can work for CRUs, First Nations and Funders – existing templates are still missing the mark