

**Notes from GMN Annual Conference March 16, 2010 session:  
“Recruiting, Retaining & Developing your Grants Management Staff”**

Presented by:

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*Recruitment—Rik Treiber*

**Goals to consider when hiring for a grants management position:**

- 1) Trainability—Of necessity, your GM hire will need some training, as you cannot major in grants management in college. How trainable are the candidates you’re considering?
- 2) Independence—Your GM hire will need to be something of a self-starter who can work independently.
- 3) Longevity—Ideally, you would like your GM hire to stay for a significant length of time so you won’t have to start the recruitment process all over again.
- 4) Creative Problem Solver
- 5) Direct Communicator
- 6) Fit—the candidate must be a good fit with other staff members and the organization’s culture, but of course, must also be a fit for the position and the job duties
- 7) Flexibility
- 8) Wants the job advertised—the candidate should be genuinely interested in and enthusiastic about the position you have open. They should not be “settling” for it or hoping to use it as a stepping stone to a better position.
- 9) Ability to balance program demands & policy requirements—someone who can stand up well to the job pressures.

**Characteristics to look for during interview process:**

- 1) Commitment to the sector
- 2) Technical skills—generally, you will want someone who has some experience with the back end of a database
- 3) Chemistry—with others in the department & organization. You want to know that the candidate will enjoy working there and that the staff will embrace him or her.
- 4) Detail-oriented
- 5) Can-do attitude
- 6) Persistence
- 7) Strong work ethic
- 8) Curiosity: do the candidates you’re interviewing have questions for you?
- 9) CAR (Circumstance, Action, Result): One audience member mentioned that they use the CAR process when interviewing prospective candidates, asking them to describe a particular circumstance or problem they’ve encountered in their work, the action they took to deal with it, and the results of their actions.
- 10) Sometimes you actually might want a candidate who is inquisitive and who might upset the apple cart a bit

*Retention—Adrienne Fisher*

**To manage and retain your staff, grants managers/administrators/directors should:**

- Establish a good working relationship between grants management team and program staff
- Imbue grants management staff with good team spirit and an attitude of service
- Recognize each staff member's strengths and work to develop them
- Teach not just the process, but the *why*
- Give grants management staff opportunities to attend professional development events—both grants management and technical
- Delegate responsibility, then step back and give staff time to undertake the work and think about it independently. Don't micromanage, but do "inspect" the final product. Keep an eye on staff and inquire about things that go wrong in a gentle, non-demeaning manner. Help staff set priorities, if needed.
- Be accessible and receptive
- Let grants management staff know that you will be the one who is responsible for the ultimate outcome—that you will have their backs. Be a protector of your staff.
- Build "whole person" relationships with your staff that are not just about their professional roles
- Have fun at work. This should be a goal.

**Other considerations:**

- Phase of life—you want someone who will stay and be a star, but sometimes you actually do want someone who will grow out of the position and eventually move on
- Managing expectations—transparency is important here. Be honest with staff about how much you can offer them and be transparent about any performance issues and whether there is a goal for your staff members in terms of development.
- Sometimes, even if you're a direct communicator, you have to keep putting expectations on the table and keep being candid.
- Try to convey that organizational requirements (such as a second pair of eyes to review documents) aren't necessarily a critique of a staff member's work, but rather, are a way of ensuring quality control
- It's also important to recognize and credit people for their input

*Development—Byron Stuck*

**Goals & Assessment:**

- You have to decide on the level of "paternalism" you are comfortable with in balancing the goals & assessment process—your staff's goals and the goals you think you should set for them.
- You need to consciously think this through and have a dialogue about it with your staff members in the review process.
- Include goals in the routine cycle. This includes the more informal day-to-day work. Fold in the goals, such as asking your staff members to present what they learned at a class or workshop so that others in your group can benefit from that knowledge.

### **Internal Learning & Development:**

- Some of the staff members' training opportunities can come internally
- Provide routine updates on topics impacting your work
- Grants management get-togethers can also be about development. Take requests for topics on which your staff needs more information and use this time together as a knowledge-building opportunity—to learn about and share information.
- Professional organizations/associations: these are a good opportunity to learn about things, but they also give your staff opportunities to do things like present
- Mentoring: having a staff member shadow you for a day or at selected events and meetings can be helpful for them to see the other opportunities and structures in your organization, as well as to understand processes
- Formal Education: If your foundation will pay for educational opportunities, university extension services can offer some benefit. Have staff members who take advantage of this offer bring their knowledge back to the office and teach the rest of the team what they have learned. It's a learning opportunity for the rest of the staff too.
- Be multi-year focused. Don't have just single-year/annual cycle focus, but rather, help staff plan for their development over the long-term, and if they're interested, help them plan for a time when they will move on from their position. If they have a long-term career objective beyond grants management, ask how you can help them reach that 3-4 year goal.

### **Job Enrichment:**

- Sometimes an alignment of professional goals can be achieved outside the formal written job description as well. One audience member noted that his organization allows staff to undertake volunteer work as part of their paid time.
- Some foundations offer opportunities for staff to make grant decisions in the general vicinity of the foundation's grantmaking. This can be particularly rewarding for non-program staff—it allows them to have an immediate impact on their community and it gives them more insight and input into the work of the organization.
- Allow staff to attend convenings of grantees. It can be exciting and empowering for them to hear about the work of the grantees in a way that isn't filtered through reports.
- Open communication—get to know staff and their goals early on. Maybe you can help them reach those goals within the foundation or find outside foundation opportunities that will help them meet that outside goal.
- Give GM staff the context for grantmaking through talks and small research assignments on what specific program area grants are about; however, be sure to first ask your staff what they would like to know.

The panelists and audience also discussed the value of using paid & unpaid interns, noting that beyond the obvious benefits, there may be disadvantages, as sometimes interns benefit from more opportunities than the staff, and sometimes it's just not worth the time invested to train them if they won't be with the organization for long. Sometimes interns also fill roles that should more appropriately be filled by a full-time staff member.