

## Managing Expectations, Coping With Realities

**Newcomers to philanthropy often find acclimation difficult. Here, ten interviewees discuss their beginnings and recommendations from lessons learned.**

by Lee Draper

Every year, scores of individuals are recruited to join the program staff of foundations. As program officers or directors, they allocate billions of dollars to the nonprofit organizations doing work in our communities and abroad.

Despite being charged with such responsibility, newcomers to the field of philanthropy are typically brought in without much formal orientation, training, coaching or mentoring. Often they are thrown into their positions like a novice swimmer pushed off the diving board into the deep end. They are shown the office and the piles of proposals to review. Colleagues expect them to walk in and, from the get-go, evaluate funding requests, assess financial statements and effectively interact with nonprofit leaders.

People who join foundations come from a variety of backgrounds and experiences. There is no institutionalized credentialing or degree process for those new to the field. Although many have nonprofit management experience, the grantmaker perspective that they must adopt is dramatically different. Those who arrive from the business, academic or public sectors experience a significant learning curve. Whatever their previous employment, newcomers can find their new role and responsibilities challenging, unfamiliar and stressful.

In recent years, some foundations have begun to offer in-house training or encourage new staff to attend orientation programs offered by their regional association of grantmakers or the Council on Foundations. A few publications offer guidance on how to become an effective grantmaker (see sidebars for more on these resources).



Despite this positive trend, the focus on new staff development is inconsistent. Even those foundations that want to give it priority often fail to realize their good intentions. As a result, many newcomers are not as comfortable or effective in their program roles as they could be. Trial and error can lead to disappointing results, and bad habits learned early are hard to detect or change.

What follows are insights from a group of newcomers who have been in the trenches from one month up to one year. The program officers and directors work for diverse types of grantmakers—community foundations, large national foundations and alternative funds. Some are responsible for focused fields of grantmaking; others are generalists. They include former executive directors and staff of nonprofit organizations, former university professors and students, and former business executives. Some of them happened on their new career in philanthropy, while others joined a foundation after successfully completing a job search geared toward grantmaking.

Whatever their paths, all have provocative input for foundations in welcoming new grantmakers and helping them in their first six months on the job to effectively serve their foundations, the nonprofit community and the public.

### **Coming In with Preconceptions**

New staff members often bring preconceived impressions about who grantmakers are and what it will be like to be one of them. Some of those expectations are negative or troublesome, and they inevitably influence how newcomers approach their work.

Many nonprofit leaders who, in their previous jobs, have sought funding for their programs view foundations as impenetrable ivory towers. Roland Palencia, a senior program officer with The California Endowment, recalls that during his 13 years as a nonprofit executive he saw grantmakers as "the haves" and nonprofits as the "have-nots." "I thought, 'They have money—why not give it to me? I have a need, why isn't that enough?'" But like nonprofits, foundations also have their missions and priorities of the type of work they will engage in.

John Bracken, a program officer at the MacArthur Foundation, had a similar perception of grantmakers based on his tenure with several nonprofits. "Before I had ever worked in a foundation, I saw them as opaque. They were mysterious and unknowable. I felt like they were these institutions on a mountaintop somewhere, and I didn't know how to approach them. I may have heard second- or third-hand how a foundation was thinking."

Foundations are often seen as privileged institutions that try to set the agenda, rather than work in partnership with nonprofit leaders to meet community needs. "My viewpoint of funders was not a positive one based on the women's groups I've worked with that have had difficulties with grantmakers," says Zeina Zaatari, a program officer with The Global Fund for Women. "Most funders are involved in promoting their own projects, as opposed to what women need. And they fund projects rather than organizations. Because they come in with packaged approaches, groups eventually change their agendas to try to

fit into funding guidelines. Funders end up significantly influencing the dynamics of organizations."

At the other end of the spectrum, David Lansky, program director at The Markle Foundation, often found grantmakers to be disinterested. "As someone who had worked closely with over 50 foundations as a grantee, I've found people at foundations to be very diverse: Some were academic and others wanted to get their hands dirty; some were passionate, others downright calculating; some were casual, others were businesslike. Most of them care about their work and want to see its impact out in the world. But I ran into a lot of complacent and disengaged grantmakers, too."

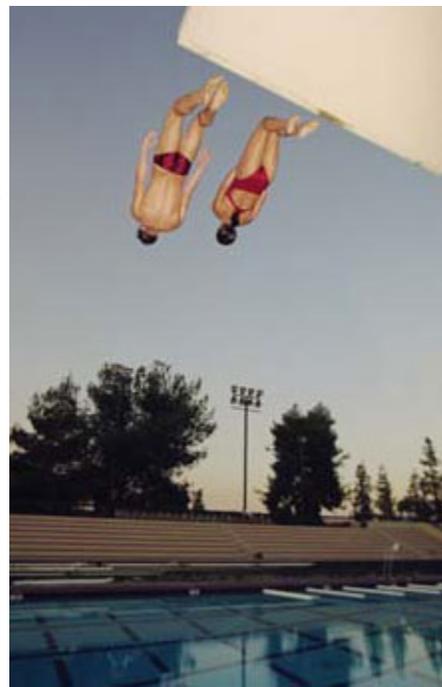
A number of those interviewed mentioned that their friends and colleagues had a mixed reaction to the news that they would be taking a job at a foundation. They cautioned that it would be different "over there" and to be aware of the power dynamic always at work.

Amy Dominguez-Arms, a program director with The James Irvine Foundation, felt she knew what did and didn't work on the other side of the table based on her experience heading a nonprofit. Once at the foundation, she reflected on the positive attributes of foundation representatives that she had met. "I appreciated those program officers who had an understanding of the field in which I was working because they could offer substantive contributions to our programmatic discussions. I also appreciated program officers who were friendly, respectful and clear in their communication," she says. "Now that I am on the inside of a foundation, I realize how grantmakers' approach to grantees results both from personal characteristics as well as from the messages communicated by the foundation's leaders about the values we demonstrate in our interactions with grantees."

These preconceptions and concerns are instructive. Each of those interviewed said that because of their own negative interactions with grantmakers in the past, they wanted to be more sensitive to how grantees might perceive them and make an extra effort to treat nonprofit leaders with respect and equanimity. Harnessing this awareness and incorporating it into the orientation process can help new staff establish a habit of interacting with community leaders in a way that makes foundations accessible and well regarded. It can inform their work not only at the onset, but also in going forward.

### **First Impressions and Immediate Challenges**

Once newcomers walk in the door, they are confronted with the reality of doing the core job of a grantmaker. Their initial challenges reveal essential training needs and tools. Most discuss the desire for information on the nuts and bolts of making grants—how to evaluate which nonprofits to support. But of equal importance is the need to quickly learn how to function well within their foundation, interact successfully with the



nonprofit community and determine the overall funding direction to achieve goals.

### *How to Function Appropriately*

"One of the biggest challenges is that each foundation has its own internal language and art or method of making grants. So, I have had to focus on learning the lingo, figuring out how to do what needs to be done and acculturating to the rhymes and rhythms of the new environment. I've learned by reading as many internal documents as possible, but I have learned by trial and error; by making mistakes. I just try not to make the same mistake twice," commented Bracken.

Charles Roussel, a program director with The Atlantic Philanthropies, adds, "One challenge has been knowing what language to use in the field. In the children's sector, there's certain terminology—youth development lingo—that one needs to understand pretty quickly; so early on, there was great potential to miscommunicate. For example, if I said I wanted to invest in 'model programs,' some responded by saying we don't need more models, just fund existing ones to get them to scale. Others responded by saying we need more models because one size doesn't fit all. What I actually meant was that we wanted to invest in 'best programs.'"

Zaatari, like most of those interviewed, relied on fellow program staff at the foundation to learn about grantmaking. "I met with the person who did grants before I was hired. It was extremely helpful to talk to her. The files have a lot of material, but she was able to provide the dynamics of interactions and the thinking behind decisions. This does not always get written down clearly. She also provided historical information that was otherwise unavailable because documents are in storage."

Like Zaatari, Rudy Guglielmo, a program officer with the Arizona Community Foundation, took advantage of lessons offered by the previous program officer. "My predecessor showed me how to delegate work and helped me to prioritize things." But in terms of his day-to-day work, "like the nonprofits we serve, we are trying to get substantial workloads accomplished with small, often overextended staff. It can be challenging to keep the lines of communication and exchange going with the program staff and director—who travel and are out in the field extensively." This is a commonly expressed hurdle about getting grounded in the foundation's expectations.

Roussel looked to experts outside his organization for guidance. "When I got to the foundation, I didn't know much, so I met with anyone I could. I must have done 150 interviews outside of the foundation in the first six months. I talked with other grantmakers in my program area. I met with nonprofit executives and absorbed everything I could. I relied on foundation staff to identify people to talk to and asked the interviewees who else I should meet with. I made site visits. Throughout, I was well supported at the foundation in doing this." It proved invaluable in developing a strong base for grantmaking, because it defined a strategy rooted in the current needs and insights of the practitioners.

Jennifer Johnson, program officer at Marin Community Foundation, agrees, "Talking with the foundation's grantees early on is a tremendous educational opportunity and orientation. The grantees helped me come up to speed about issues and be better at my job. There is reciprocity; I become a better evaluator of proposals and have a better understanding of environmental issues in Marin."

### *How to Make Funding Decisions*

Saba Brelvi, a program director at The California Wellness Foundation, says "In reviewing requests, I expected that there would be a significant distinction between organizations that should receive funds and ones that shouldn't. I thought the good organizations would rise to the top, and it would be clear why I should fund them and not others. But there is an art to distinguishing among them; it is not only a science. It takes practice."

Guglielmo says, "One thing that surprised me was the limited capacity of community-based, social service nonprofits. They have much greater struggles than the arts organizations I've dealt with in the past. They may be larger in budget size, but they have deep problems involving their board, staff and fundraising. How to find ways to support them? It's all more complex than I had anticipated."

Alice Carle, a program officer at the Kresge Foundation, agrees. "There are no hard and fast rules for grantmaking. We can define criteria, but assessing how an organization meets those criteria requires some level of judgment and that can be difficult."

Many of those interviewed had to learn how to be a grantmaker by just delving into the work and seeking out help from their coworkers. "There was no training on how to assess budgets, how to prioritize grant requests or how to plan my work. That was a little surprising. I've had to learn as I go," Johnson remembers.

As someone who had spent years making business investments, Roussel was struck by the differences in the nonprofit sector. His initial impressions were accentuated by the minimal emphasis on rigorous, fact-based decisionmaking. "I thought foundations went through a fairly exhaustive process of evaluating organizations. I assumed there was good information out there about organizational performance, but there's not, unlike in the corporate sector. I also thought foundations were actively engaged in managing their investments, keeping an eye on what's going on with grantees. But very few foundations are committed to real due diligence in the review process and to being appropriately engaged with the organizations they fund. Atlantic is, and things are starting to change broadly. But, it will take some time."

Sometimes, a lack of preconceptions can present challenges. Newcomers may anticipate an easy transition because of their experience in the nonprofit sector. After they start working, they find the differences are dramatic. "I didn't really have any expectations. However, I have found that the foundation world is much more conceptual. Because you are not on the ground, your tools are mental: analysis, inquiry, research. In my transition,

I had to shift my way of working. In the community, I saw a need, conceptualized an idea and saw it implemented. The real cycle of things was much more palpable and more grounded. Now, I don't see immediate gratification or feedback and must find value in a different form," Palencia said.

### *Establishing Good Relationships with Nonprofit Leaders*

Newcomers have a difficult time saying "no," and this discomfort is part of a larger adjustment that new grantmakers must make in creating strong working relationships with nonprofit leaders despite the power imbalance. Although foundations would be unable to do their work without community leaders, they can wield a great deal of power because they hold the purse strings.

"It's not easy giving away money," says Palencia. "You might think this is a cushy job, just giving money away. But the needs far outstrip the resources. I have to make hard choices, choices not just based on need, which would seem to be the keystone of philanthropy. There are so many other variables that are of equal weight, such as the capacity of an organization, the history of an organization, the impact the project will have on the community, the people who I'm trying to help and how an organization will be accountable for the results. The learning curve is quite high."

Brelvi gives a more personal perspective. "I anticipated this, but it's hard to say no to folks doing great work. There's no way around it. I have to say no to people I know. I have a lot of relationships with nonprofit leaders, and often I must turn them down. It's very hard. I've dealt with it by just doing it. I prepared myself for it, but it continues to be hard."

"Another challenge I face is handling the awkwardness of the carrot I carry. I can never be unconscious of it," says Johnson. "I know my grantmaking has influence, but I don't want this to get in the way of working productively with organizations. As a newcomer, I'm still feeling my way through this. I've known some of the grantees from the community, which has been helpful. I've wondered though if they're behaving differently with me than they used to. There is a certain kind of formality. There's an effort to impress. They are extremely respectful. That's fine but it can go too far." In addition, "it's hard to avoid a sense of competition among grantees. I want to promote cooperation and collaboration. I also recognize that groups are trying to develop and maintain their own identity. They want to shine in their own light. They have to do fundraising to keep their organizations alive. Now that I'm in grantmaking, I'm afraid my presence and influence could make this felt more deeply."

Bracken describes his own challenges in creating a working relationship with nonprofits. "Before I joined the philanthropic community, someone told me about one friend who worked at a foundation. He said it was a miserable job, that he always feared that people were only nice to him because of his position. I have not felt that way, but in my day-to-day interactions with folks, I have to be cognizant of the fact that where I set can affect relationships with people. I try to make up for this by being myself and relating to people

on a one-to-one level. I try to understand where a grantee is coming from and see the world from their perspective. After all, they're the ones doing the work."

Lansky, who works at an operating foundation focusing on national health policy, finds his relationships are equally important. "An operating foundation is not that different from a grantmaking foundation in terms of relationships. We form partnerships with hundreds of organizations, some of which contribute time and others, money. These people don't have the same interests or objectives. But in developing a national strategy for changing our healthcare system, all of them have to participate. They all must make compromises. The challenges of my job center around bringing disparate viewpoints together in a real and lasting way."

### ***Balancing Daily Work and the Big Picture***

Carle reveals another common challenge among new foundation staff. "Newcomers may not realize the extent to which good grantmaking requires of interaction with grantseekers. Grantmaking is more than just assessing applications and making recommendations. As a national foundation, interaction with grantees is important because we are often not in the same community. It takes a while to learn how to get to and manage this meaningful interaction."

Similarly, many of those interviewed struggled with tackling daily responsibilities while developing the knowledge and capacity to achieve programmatic goals. Carle comments, "A challenge that I underestimated was the ability to balance professional development with day-to-day tasks. I try to read and attend conferences as much as possible to keep abreast of all the sectors we fund, but the daily activities of grantmaking itself often tend to take precedence over professional development opportunities."

Newcomers are faced with difficult dilemmas of getting command of their direct duties for the foundation and also participating in outside professional activities that are important to becoming an effective grantmaker. Brelvi says, "My assumption has been that grantmakers have a fair amount of freedom to be thoughtful about the work they do. Unlike nonprofits that must worry about making payroll, grantmakers would seem to have the luxury of having time to think about what to do before they do it. However, I've found it hard to carve out time to learn more about other foundations doing similar work and where the gaps are. The learning curve of what's happening in my own foundation has been very steep."

Roussel adds, "It would have been helpful to have been able to do some networking and formal professional development early on, to go to conferences and meet colleagues who can serve as 'pen pals' outside our own foundations."

Indeed, there is often immediate pressure to act and make decisions quickly. Especially if positions have been open for some time and the workload is backed up, new program staff members are encouraged to get started immediately. "Looking back, I wish I had read a lot more about grantmaking processes and content. There is a tendency to spend a

lot of time in internal and external meetings, responding to e-mails, etc. I wish I had learned more about grantmaking theory, spent time reading a lot more proposals and asked more questions," suggested Palencia.

As newcomers begin to take on the job of grantmaking, they must face the challenges unique to deciding how to allocate a foundation's resources in a manner consistent with the foundation's mission and the community's needs. It's common for foundation staff to be confronted by issues such as how to say "no," how to stay on top of developments in the field and how to make recommendations that are actually funded. While no amount of training can make these challenges disappear, understanding them from the perspective of a new grantmaker can help foundations achieve a successful transition.

### **Elements of an Effective Orientation Program**

The orientation process for these newcomers varied significantly. One was given an explanation of his territory and a map and told to get out there. Another received training on how to use the web-based software for the foundation's online grantmaking process and that was it. Unfortunately, all too often, new program staff receive the HR basics, a demonstration of the grants tracking software and filing and phone systems, and the orientation is considered complete.

However, other foundations provide a one-week orientation or ongoing formal training throughout a three-, four- or six-week period. Zaatari shared an overview, "I had a three-week orientation that went over step-by-step what to do. It was combined with my on-the-job work. The orientation covered the life of a proposal, including what happens to the application, the grantmaking process at the Global Fund—values of the foundation, what language to use, the grants database—and relationships with grantees—how to respond to inquiries and how to request things. The orientation also discussed the roles of the various departments or teams, including, for example, administration and communication."

Based on the recommendations of those interviewed as well as broader discussions with foundation leaders, the following suggestions will welcome newcomers and put them on the path to success as grantmakers. It's in the interest of those who join our field—as well as the constituencies that we serve through our grantmaking programs—that we incorporate best practices into our orientation and training programs.

1. Everyone appreciated having a solid orientation to work conditions. This includes how to use the grants tracking software, the computer system in general, the filing system, the phones, HR policies and benefits and office procedures.
2. New program staff members want to get an equally thorough orientation to the foundation. Key areas include:
  - Mission and history
  - Overall program areas

- Priorities and plans
- Values and philosophy
- Grantmaking approaches and strategies
- Policies and procedures.

In addition, newcomers need an in-depth orientation to their program areas. Topics include:

- History of the foundation's interests in these areas
- Current grantmaking trends
- Issues of most concern to the foundation within these areas
- Grantmaking approaches and strategies
- Highlights of recent grantees and types of programs supported
- Funding regions and the dynamics of funding in those regions.

Have program staff do presentations on their grantmaking strategies, and have other foundation staff share information about the roles of their departments or teams. For example, Dominguez-Arms recounted, "Throughout my first weeks, I had several formal sessions on grantmaking, internal operations, committee functions, and the foundation's management systems and philosophy. I also spent time with the vice president going over the background and substance of the grants made in my area. She was very helpful in discussing the rationale behind the decisions so that I had a strong sense of the foundation's priorities and considerations. This orientation process helped me to understand key elements about my job and the foundation. With that grounding, I felt well-prepared to move on to the substance of my work."

Roussel stressed the importance of getting grounded in the field. "The problems we are tackling have been around for a long time, and some very smart people have tried many things before. So I have to figure out what has worked and what hasn't in the past. I'd want to include in an orientation program what has happened in the field historically. I'd want to encourage strategic thinking—logic models, theories of change, etc.—from the onset, but it takes time and patience up front."

3. Because of the adjustment to the grantmaker's specialized perspective and role, newcomers want in-house training on how to review proposals. On the one hand, they need to know the life cycle of a funding request from the moment it is received at the foundation to its conclusion: from who opens the mail, to who puts the information into the database, to what happens to a proposal before and after it goes to the program officer's desk. On the other hand, they want a solid orientation to the steps and considerations in reviewing a funding request.

"It is important for me to understand how the process works and my role in it. Then I am able to communicate to applicants where they are in the process and why certain documents are needed. When the process is transparent, I can assure them that they are not just jumping through hoops," explains Bracken.

Brelvi outlined, "I had several days of orientation about the foundation's grantmaking process: how to make grants, policies and procedures, how to use the software, how to do financial analysis and review, what order things go in, where the bulk of work comes from, the letter of inquiry versus the proposal process and what is required in making recommendations to the board. I started reviewing letters of inquiry during the first month." Dominguez-Arms received an in-depth orientation and a binder with reference materials on all of the steps in the process, which she has used often.

Carle's training period lasted six weeks and involved a thorough orientation in her foundation's proposal review process. It involved a quasi-apprenticeship that coupled her with a seasoned program officer to help her learn the foundation's methodology. "The first couple of weeks, I read prior grant files to get a sense of what Kresge looks for and how a recommendation moves forward. Then I was given an active set of applications to review with a senior partner who reviewed my work as we moved through the process. We always work in teams so that we continue to learn from each other and not work in isolation. Everyone is open to providing feedback and I am learning as I do the work."

Johnson counsels, "Some of an individual's values come through in the interview process, but it doesn't stop when you get hired. There should be a process to ask the newcomer whether they are applying their own values. It is important to keep the discussion open and ongoing, perhaps as part of a one-on-one or group conversation. Compare one's personal values and how they resonate with the foundation's values. Assessing one's own passions, experiences and attitudes that you're not conscious of and how they influence decisions is important, because those can bias how effectively you carry out your role as a program officer."

4. Almost all those interviewed wanted a good orientation and ongoing discussion of the best methods of working with nonprofit organizations and grantees. This includes discussing with newcomers some of the issues that invariably come up between foundation staff and nonprofit leaders in the field, such as the power dynamics, competition among nonprofits for limited resources and how to say "yes" and how to say "no."

Dominguez-Arms states, "It's important to have discussions internally about good practices. For new staff, it's also helpful to conduct meetings jointly with more senior staff so that newcomers can observe the kinds of questions asked of grantees and the ways in which their colleagues seek to add value to the grantees' project beyond the grant itself."

5. All of those interviewed shared that their co-workers and supervisors were generally available and very helpful to them in learning their new jobs. For the most part, though, the interviewees also said that one-on-one time with their colleagues was informal and depended on catching them in the office or setting up a meeting time. To ensure that invaluable information sharing is not left up to chance, set up appointments for newcomers to talk with their colleagues. "I would not wait for a new person to take initiative. I'd have them spend time with key colleagues on staff and to put such meetings

into a formal schedule," suggests Johnson. She adds, "I would highly encourage formal time set aside to work with the person in the position before, wherever possible. It was invaluable for me to talk with this person and it did not inhibit me from defining my own position in the future."

Consider setting up mentoring and coaching for newcomers to ensure that new staff have the opportunity to learn from their more senior peers. Palencia reported that he had a mentor and it was very helpful, but he had to identify that need and request it. Brelvi says, "I met regularly with the vice president of programs, my supervisor. This is a pretty open learning environment. Other program staff members have served as mentors, too. We are encouraged to treat each other on the program staff as resources. We send out multiple e-mails asking about what to do in a given situation or seeking advice on how to handle something."

In addition, encourage new staff to seek out their peers through grantmaker affinity groups and regional associations so that they can learn from one another.

6. Make resources available:

- In-house materials including orientation and procedures manuals
- Early and regular opportunities to network with other funders, e.g., conferences, affinity group meetings (both those in subject matter or to meet peers in comparable positions or types of institutions)
- Publications, including *Grantmaking Basics: A Field Guide For Funders*.

7. Although these elements will get a new grantmaker off to a great start, probably the most important lesson for foundations is the need for ongoing staff development. Giving newcomers the tools and resources they need to be responsible grantmakers will mean very little if foundations do not work with staff to ensure that they continue to be well-trained and stay up-to-date on the trends and issues facing the communities and organizations they serve.

When new staff members join a foundation, sit down with them and identify together what skills and expertise the person is bringing to the foundation and what he or she will need to be an effective and responsive grantmaker. Work together to create a staff development plan, including specific goals and how to achieve these goals. Agree on a timeframe and a budget for carrying out this plan.

### **Welcome to the Field**

Joining a foundation staff can be exhilarating as well as challenging. Often, newcomers find themselves trying to balance many different demands, while trying not to let any one thing fall by the wayside. This is the nature of the job. Therefore, it can be easy to let the reason for *doing* the job fade into the background when new grantmakers become part of a foundation.

To fulfill the missions of foundations, it's important not just to get the day-to-day tasks done. We must take the time to make sure newcomers to the foundation world are ready to take on and meet the challenges of the job. This way all the time and effort we put into it will be justified by all the good our grantmaking does in the community.

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### **COF Governance Resources ([www.cof.org](http://www.cof.org))**

*Foundation Management Series, Eleventh Edition, Volumes I–II—Foundation Governing Boards and Administration.* 2004. Item #228. \$60. Nonmembers \$110.

*The Guide for Community Foundation Board Members.* (The Council on Foundations and BoardSource). 2003. Item #302. \$15. Nonmembers \$20.

*Making the Most of Corporate Foundation Boards: Strategies and Practices.* Laurie Regelbrugge. 2001. Item #1018. 2001. \$75. Nonmembers \$120.

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### **Training Opportunities at Our Fingertips**

The Council on Foundations sponsors a two-day workshop called the Institute for New Grantmakers, which is designed to introduce newcomers to the nuts and bolts, program, financial and legal aspects of grantmaking. The institute is held several times each year, typically in Washington, DC and in another city. Topics include:

- Becoming familiar with the principles and practices of grantmaking
- Understanding the world of philanthropy
- Analyzing financial statements
- Incorporating evaluation methods into everyday work
- Putting ethics into practice
- Understanding legal guidelines for program officers
- Reducing grantmaking cycle time and increasing effectiveness
- Creating and maintaining working relationships with nonprofit representatives and community leaders

The Council's website ([www.cof.org](http://www.cof.org)) has links to other helpful courses and seminars, as well as a grantmaking basics online course and a grants management tutorial. The Council also offers a mentorship program, which matches newcomers with senior grantmakers to broaden their understanding of philanthropy and teach them the essentials of grantmaking.

A number of the regional associations of grantmakers also host orientation and training programs. The Southern California Grantmakers (SCG) organized one of the first. Every year, SCG offers a three-day course, Fundamentals of Effective Grantmaking, open to

staff and trustees of private, corporate, community and family foundations. Topics include:

- Assessing proposals
- Understanding financial statements
- Conducting site visits
- Undertaking post-decision activities and evaluation
- Hearing viewpoints from the nonprofit community
- Participating in a two-hour "nuts and bolts" session in the office of a SCG grantmaker to see how individual grantmakers approach their jobs and carry out their grantmaking program responsibilities.

Please check with your regional association of grantmakers for information on training available in your area.

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### **If I Could Design an Orientation for Foundation Newcomers . . .**

Here are seven things that those interviewed wish they had received when they got started:

1. Solid orientation to the conditions of work, systems and office procedures
2. Thorough understanding of the foundation
3. An in-depth overview of the program areas they will work in
4. In-house training on how to review proposals, including the life cycle of a funding request from the moment it is received at the foundation to its conclusion and the steps and considerations in reviewing a funding request
5. Discussion of the best methods of working with nonprofit organizations and grantees
6. One-on-one meetings with key colleagues at the foundation and, if possible, a mentor or partner
7. In-house orientation and procedures manuals, early and regular opportunities to network with other funders and other publications and resources
8. A plan for ongoing staff development.

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### **Key Publications**

***Grantmaking Basics: A Field Guide for Funders***

By Barbara D. Kibbe, Fred Setterberg and Colburn S. Wilbur. Council on Foundations. 1999. Item #509. \$35. Nonmembers \$55. To order, call 888/239-5221 or visit [www.cof.org/Publications](http://www.cof.org/Publications).

***Grantmaking Basics II: A Field Guide for Funders***

By Fred Setterberg, Rushworth M. Kidder and Colburn S. Wilbur. Council on Foundations. 2004. Item #510. \$35. Nonmembers \$55. To order, call 888/239-5221 or visit [www.cof.org/Publications](http://www.cof.org/Publications).

***The Insider's Guide To Grantmaking: How Foundations Find, Fund, and Manage Effective Programs***

By Joel J. Orosz (publication sponsored by the W. K. Kellogg Foundation). Jossey Bass. 2000. \$37. Order online at [www.josseybass.com/WileyCDA](http://www.josseybass.com/WileyCDA).

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**The Interviewees**

***Charles Roussel***, Director of the Disadvantaged Children and Youth Program, The Atlantic Philanthropies (New York City)

***Amy Dominguez-Arms***, Program Director, The James Irvine Foundation (San Francisco)

***Zeina Zaatari***, Program Officer for the Middle East and North Africa, The Global Fund for Women (San Francisco)

***Rudy Guglielmo***, Program Officer, Arizona Community Foundation (Phoenix)

***Alice Carle***, Program Officer, Kresge Foundation (Troy, MI)

***Saba Brelvi***, Program Director, The California Wellness Foundation (San Francisco)

***John Bracken***, Program Officer, The MacArthur Foundation (Chicago)

***Jennifer Johnson***, Program Officer for the Environment, Marin Community Foundation (Novato, CA)

***David Lansky***, Director of the Health Program, The Markle Foundation (New York City)

***Roland Palencia***, Senior Program Officer, The California Endowment (Woodland Hills, CA)

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