



# STAFFING IN FOUNDATIONS

A TOOL FOR CANADIAN FOUNDATIONS  
TO HELP YOU BUILD YOUR TEAM



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# PURPOSE OF THIS GUIDE

*This guide was created to inform members about typical foundation staffing structures and roles.*

It is intended for foundation leaders who will find it useful as they build their team, or reposition staff to improve their effectiveness.

The structure in this guide reflects typical staffing patterns of PFC members.

Positions and descriptions are based on our compensation survey of members as well as job postings from member organizations.

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# STAFFING IN FOUNDATIONS: CONSIDERATIONS



- › Most foundations in Canada begin with a small staff (1-3 full-time or part-time employees)
- › Foundations that run their own programs tend to have more staff
- › Foundations with family offices may rely on some of the staff from the corporate office for foundation related tasks (i.e. accounting)
- › Foundations with accountability structures and explicit grantmaking procedures or who run their own programs, tend to hire professional staff.

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## ADVICE WHEN STAFFING YOUR FOUNDATION

- › **Start slow**
- › **Focus** on what you need most to begin
- › **Decide** if you need specialized expertise
- › **Learn** from other foundations of similar size and function (grantmaking and/or run programs?)
- › **Outsource** some functions (i.e. bookkeeping, auditing)

*'It isn't just the numbers of staff that matter in terms of how a foundation is experienced by those with whom it works. It is the quality of those staff and the culture and climate in which they work.'*

Phil Buchanan  
Blog series *Foundation Staff Matter*, Center for Effective Philanthropy



# CATEGORIES OF STAFFING POSITIONS

**CHIEF EXECUTIVE  
OFFICER**

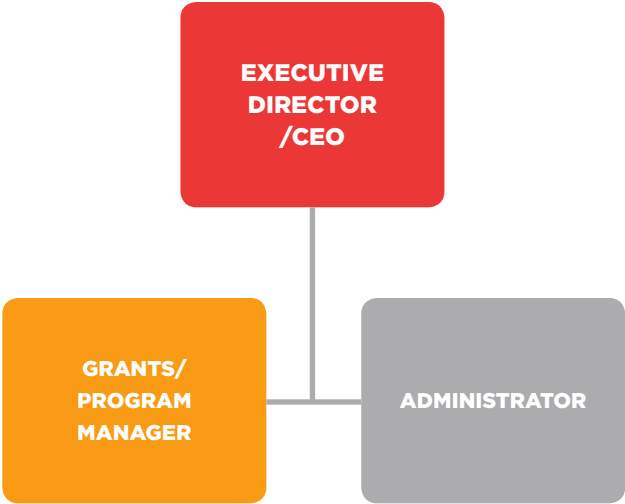
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**MANAGEMENT**

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**NON-MANAGEMENT**

TYPICAL STAFFING  
STRUCTURE  
FOR **SMALLER**  
FOUNDATIONS



TYPICAL STAFFING  
STRUCTURE  
FOR **LARGER**  
FOUNDATIONS





# SAMPLE POSITION DEFINITIONS OVERVIEW

The following general position descriptions are from the PFC 2018 compensation survey (full report available to member CEOs only). The most commonly reported position is Executive Director/CEO, followed by:

- › Program/Grants Director
- › Program/Grants Officer
- › Administrative Assistant

Sample position descriptions with competencies and duties and interview questions are available to PFC members in the member area of the PFC web site or upon request by contacting [lgoulet@pfc.ca](mailto:lgoulet@pfc.ca).

In larger foundations you may also find communications positions and senior finance and administration.

***‘The small size and great diversity of nonprofits often requires larger foundations to have enough staff to be able to interact with many different entities and to be knowledgeable enough to make good decisions about who to fund.’***

Phil Buchanan

Blog series *Foundation Staff Matter*, Center for Effective Philanthropy

## EXECUTIVE DIRECTOR/ PRESIDENT

Accountable to a fully autonomous Board of Directors for executing the organization's mission, strategy and business plan.

### **Specific responsibilities may include:**

- working within broad strategic guidelines and Board policy leads the organization to attain short and longer-term strategic financial and operational goals and develop its organizational culture;
- plans, directs and monitors all aspects of the organization's operational policies and the achievement of revenue/fund development objectives and initiatives;
- manages staff committees and develops business plans in collaboration with the Board; and
- may liaise or advocate with various levels of government, community partners and other stakeholders to further the goals of the organization.

### **Common Titles:**

Executive Director  
President  
Chief Executive Officer

## DIRECTOR FINANCE/ CFO

This senior position is the senior finance and administrative manager in the organization reporting to the Top Executive. The position functions under the guidance of strategic and business plans with periodic review of results. Develops and implements financial and accounting policies.

### **Key accountabilities include:**

- the effective direction of the organization's finance;
- accounting and treasury functions including budget development and monitoring;
- financial reporting to senior management, the Board and funders;
- coordination of the organization's information systems; and
- other responsibilities will include the direction of one or more administrative support functions for the organization, such as HR, Legal, IT, Purchasing.

### **Common Titles:**

Director Finance  
Chief Operating Officer  
Chief Financial Officer  
Director Finance & Administration

# PROGRAM/GRANTS MANAGER

This senior position will typically report to the CEO or an Executive Director and is accountable for the effective development, delivery and evaluation of grants or charitable programs that will contribute to the achievement of the organization's mission and goals.

## **Specific accountabilities may include:**

- › analyzing and defining community needs;
- › assisting in the development of new granting initiatives and overall strategy;
- › participation in community advocacy and social action processes, project management;
- › recruitment, leadership and performance appraisal of a team of professionals, para-professionals and/or volunteers;
- › program priority setting, maintenance of appropriate reporting; and
- › development and management of the team's budget.

This position is typically found in fund granting organizations including governmental bodies, foundations, United Ways and other public bodies.

## **Common Titles:**

Program Manager  
Grants Manager  
Senior Program Officer  
Director of Grants

***Grants Managers can play a critical role in helping their organizations ask and answer important questions about their grantmaking.***

PEAK Grantmaking

*Successful Structures: Rethinking the Role of Grants Management*

## EXECUTIVE ASSISTANT

This is a senior level administrative generalist or administrative support position responsible for providing a broad spectrum of administrative support functions to one or more senior managers.

### **Specific accountabilities may include:**

- administration of a technical administrative function such as human resource or benefits administration;
- participation in the development of project and program submissions;
- coordination and preparation of reports to Top Executive, members and funders;
- coordination of events such as AGM, and board meetings;
- represent the organization at community or industry meetings;
- general office administration; and
- may involve supervision of one or more junior administrative staff.

### **Common Titles:**

Executive Assistant  
Office Administrator

## PROGRAM/GRANTS COORDINATOR

This intermediate position is accountable to the Program/Grants Manager for ongoing management and administration of the grants or charitable programs.

### **Specific responsibilities include:**

- encouraging and managing grants applications, providing advice to ensure applications are appropriate to the foundation's guidelines;
- participates in the grant decision process and ensures that all granting requirements are met;
- manages relationships and communications with grantees;
- contributes to the foundation's evaluation processes by providing ongoing monitoring of funded projects to ensure effective use of funds received and that required reports are received, and the requirement for scheduled disbursements are met; and
- contributes to the review and development of community grants criteria and communication strategies.

### **Common Titles:**

Program Coordinator  
Grants Coordinator  
Grants Officer

# FINANCIAL ADMINISTRATOR

This intermediate position will typically report to the Top Executive or to the Senior Finance/Accounting position. Work is generally performed under the supervision of a more senior finance/accounting position and is subject to established procedures and principles. Work typically includes moderately complex financial and accounting processes.

## **Responsibilities may include:**

- › general accounting such as maintenance of GL, and journals;
- › bank deposits and reconciliation; and
- › coordination of financial information systems, accounts payable/receivable, payroll, benefits administration, supervision of administrative support staff.

## **Common Titles:**

Financial Administrator  
Bookkeeper  
Accountant

# ADMINISTRATIVE ASSISTANT

This intermediate position will report to the Top Executive or to one or more managers or department heads.

## **The position will be responsible for:**

- › providing secretarial/administrative support including, document production, appointment scheduling and general office duties;
- › specific accountabilities may include database management including data input and report generation, public relations document creation, providing support to the Board including taking and transcribing minutes; and
- › providing technical support to other organization staff with respect to desktop computer applications, i.e. word processing, presentations, spreadsheets and database activities.

## **Common Titles:**

Administrative Assistant



# OTHER RESOURCES

Some issues and resources to consider when staffing your foundation.

## **PFC RESOURCES**

- › [Good Grantmaking](#): A Guide for Canadian Foundations
- › 2018 Philanthropic Foundations Salary & Benefits Report (available to PFC members, foundation CEO/Executive Director only)
- › Position descriptions with competencies and duties and sample interview questions are available to PFC members in the member area of the PFC web site or upon request by contacting [lgoulet@pfc.ca](mailto:lgoulet@pfc.ca)
- › PFC program and grantmaking staff affinity group (PGSAF). Contact [ichaalala@pfc.ca](mailto:ichaalala@pfc.ca) for information.

## **OTHER RESOURCES**

- › [Foundation Staff Matter](#). Blog series from Phil Buchanan, Center for Effective Philanthropy
- › [Successful Structures: Rethinking the Roles of Grants Management](#). A series of case stories highlighting the connection between organizational strategy, organizational structure, and the role of grants management, PEAK Grantmaking
- › [GMNsight is a professional journal](#) written for and by the members of Grants Managers Network
- › [Grants Management and the Foundation of the Future](#), Center for Effective Philanthropy

