Yikes! I got the grant! How to be a grant manager

In this March 24 EHHD panel discussion, Libby Hancock (Early Childhood Project Director), Beth Rink (HHD Associate Professor of Community Health), Elisabeth Swanson (Education Associate Professor of Science Curriculum & Instruction), and Carmen Byker (HHD Assistant Professor of Food and Nutrition) all shared their successful strategies for managing a grant and a team, and lessons they have learned along the way. Elizabeth Bird (EHHD Project Development Specialist) chaired the session, posing and fielding questions. The order and extent of each panelist’s response varied by question.

What challenges have you faced and what have you learned about strategies to address them?

In learning to be an academic project director, Beth described some hard-won lessons. She has realized she wasn’t quite prepared to manage several large grants all at one time as well as being on the tenure track. Even though she’d had prior large project management experience, she often felt overwhelmed. Another lesson concerned the hiring of a project coordinator. Being overwhelmed put Beth in a state of rushing to get help, which meant she didn’t take enough time to think through just what kind of person was needed for her projects. With her work with Indigenous populations, she said, “it’s all about the relationships.” The person she hired needed to be prepared to invest in relationships with her and especially with her community partners and collaborators, which did not always happen. She made similar mistakes in involving grad students on her research projects before knowing if the graduate student would be a good fit for the project or not. Her way of dealing with the overwhelm was to shift into “overdrive.” She added that she “spent a lot of time working with Carmen Fike (OSP Fiscal Manager), Lynn Marlow (EHHD Accounting Associate), and Barb Bunge (OSP Subcontracts Manager)” who each helped with different management questions and tasks.

Libby described how the Early Childhood Project (ECP) was started with an HHD faculty member and multiple grant sources, but now is funded completely by the Montana Department of Public Health and Human Services. ECP has five staff members with outreach and program goals to build and maintain a multi-faceted early care and education career development program and to partner to create a comprehensive early childhood system in Montana. Libby commented that hiring mistakes happen to everyone, but they can be costly to relationships with partners and the program’s track record with funders. She recommends spending time to think

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OSP = MSU’s Office of Sponsored Programs
through the job description, and pay attention to relationship skills. Program staff need to be able to serve effectively as ambassadors. Libby currently finds the ECP is being asked to add more projects to their plate than they can readily manage. “If you do good work, have a good track record, and keep the funder informed, you will be asked to do more and more; sometimes you have to say no.” She adds that it is critical to revisit your vision and mission to purposefully select areas for growth and expansion.

Elisabeth has always said “yes” to doing more, and rarely has regretted it. Saying “yes” to funders – for example, saying “yes” to handling the agenda and logistics for a national conference not in the original grant, and then orchestrating the resulting monograph requested by the funding agency – helps to get further funding. She started grant work pre-tenure, and the first project lasted 8 years (5 years initially, plus supplements). Fortunately there were other people in the team able to mentor her prior to their retirement. With her work on STEM education, she cited the benefits of grant-experienced mentors from mathematics education working with her as co-PIs. Though she didn’t realize what she was getting into at the beginning, she “got a ton of experience” with good mentoring. She also learned that at the outset of a large-scale, complex grant project the prior experience of all team members is valuable, yet limited. In fact her leadership team, composed of faculty from education, mathematics and the sciences, continuously confronted novel predicaments and had to be adaptive, flexible, and problem-solve as a team. Awarded grants come with few instructions, and the blueprint in an original proposal always turns out to be incomplete, if not flawed. That’s why flexibility and teamwork are so essential. Elisabeth also commented on the value of each team member having an agreed-upon title that is descriptive of their role and contribution.

Carmen has managed several small grants from diverse MSU, federal, and private foundation sources. She recommends thinking about the management process as you apply for grants – “Don’t get really excited. Instead be realistic about what you can manage.” She described a specific experience with one foundation grant where researchers and partners over-committed on deliverables and discovered the grant management was much more intensive than expected. She found that it is important for all involved to be realistic about the requirements of time. She noted it’s critical to invest ample time into training; if the students or staff are appropriate and on board with your vision, and you let them know your intentions and the project’s desired outcomes, they generally will do a good job: “Trust them if you’ve trained them well.”
What challenges have you encountered in managing success?

Elisabeth recommends that faculty think about their own personalities, and the kinds of systems they like to work with when they first decide which kind of a grant to apply for. For example, grant managers may function well in a highly focused research grant that involves just a handful of personnel and largely “known” variables. Others may thrive as managers of larger scale, systemic research grants that are likely to involve more players and research scenarios that shift over time. When possible, Elisabeth recommended that faculty soul search when choosing between solicitations to apply for, and be willing to wait for a solicitation that plays to their strengths. “I like to think in terms of systems, the larger the better. I’m a big picture person.” Everybody has to find the “unit” of research and action that’s a good fit for them. Libby added that it’s important to be clear about your strengths.

Libby commented she found that as funder expectations rose, some of her staff felt overwhelmed. How, as a manager, did she work with that? She convened a retreat to discuss roles and responsibilities and vision: “where do you see yourself in 1 – 5 years?” The retreat created a space for fears to be expressed and explored. One challenge is that the work has been getting more political, and “they’re not political people.” She also held meetings with each staff member individually to learn more about what they really like doing; why they have fears; and what new roles they might like to step into. These meetings helped with easing the tension, but they’re still working to broaden the full staff’s vision of the program’s potential role in statewide system development and impact.

Beth noted a challenge in working with community partners, that they would like to see the same project continue indefinitely. Unfortunately, if the project is funded for research, the team has to be willing to change and grow as one project paves the way for the next.

Carmen was asked how she got along without a project manager; what steps did she take to ensure effective teamwork among the partners? Carmen’s response was that they divided tasks and responsibilities among all the faculty and the GVFB. Making each person feel responsible for outcomes provides motivation to complete each task.

The panelists felt it was important for the college or department or Vice President for Research to help with grant management. Indirect cost funds are meant to help faculty manage their grants, though in recent years no funds have been returned to the college or departments for
that purpose. The panelists recommended educating new grantees about how to be prepared. To some extent management support can be written into new grants (the extent depends somewhat on the funding agency).

*What lessons have you learned about managing partnerships?*

Carmen spoke to the challenges of community partnerships. She commented that often community partners want students engaged with service learning, and that it’s important to talk about what students can and cannot do, as well as the amount of time it’s realistic for them to make available. While partners in the community are competent, students are not yet experienced – their training and preparation may take longer than partners expect. Carmen asserted that it’s important that each partner understand the needs of each organization. For example, NGOs have a larger mission/vision than what an individual grant represents. It’s necessary to discuss different organizational needs and procedures, and reach compromise on budget allocations.

In carrying out project details, Elisabeth cited the value of weekly phone meetings and project websites. It can be helpful to visit partners at another campus, showcasing what the project is doing, helping project faculty and staff gain visibility with their administrators. She recommends separating research meetings from administrative meetings. Her productive hidden agenda has been to make every meeting a benefit to all the partners.

Libby noted that ECP has a statewide advisory board which she always includes in planning new directions. Beth’s advice about maintaining partnerships was to “always show up, if there’s something to do or not.”

*How do you think about individual projects in light of larger agendas or longer term visions?*

Libby’s wrote the current ECP workplan differently, with addenda projecting out what could change and what resources would be needed to undertake additional tasks. Carmen recommended getting started with a set of smaller grants to help develop methodologies and establish a track record for larger grants. Beth recommended thinking about where you want to be five years out.
In the end, all the panelists were enthusiastic about their grant-funded projects, and though all faced hard lessons in becoming effective grant managers, they’ve found the effort to be well worthwhile.