



BNP PHILANTHROPIC
PERFORMANCE

GUIDE TO EXECUTIVE
RECRUITING
IN PHILANTHROPY

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We endeavour to use inclusive (gender-neutral) language.

INTRODUCTION

For a number of years, philanthropy has been affected by a shortage of specialists in fundraising, major donations and planned giving. Headhunting is still one of the best ways to identify and attract competent candidates whose values are aligned with those of your organization. **Alignment of values even more important in recruiting development executives to solicit donations and raise donor awareness of your cause.**

GLOSSARY

Executive: A manager or officer who leads your organization, whether a charity, foundation, not-for-profit organization (NPO) or non-governmental organization (NGO). Together, executives form an **Executive Committee** that makes strategic organizational decisions.

Large and medium-sized organizations in Quebec may have executives in senior management, a Philanthropy Development Directorate, a Campaign Directorate, a Human Resources Directorate, or other areas.

Board of Directors: To operate well, organizations need good governance and sound operating rules. For example, to attract donors, organizations need a set of policies and regulations that govern the processing and allocation of donations. In this regard, Directors' role is to act as ambassadors.

Selection Committee: A Selection Committee is typically made up of members of the Board of Directors, senior management, or both. It works closely with the Executive Recruiting Consultant.

Executive Recruiting Consultant (ERC) or "headhunter": This person usually has a focused mandate to recruit individuals for a particular position at a given charity, foundation, NPO or NGO, using specific requirements (for example, a minimum of 10 years' experience in setting up planned giving programs).

Executive recruiting contract: An exclusive contract setting out the duties of the position to be staffed, the consultant's working conditions, ethical standards to be respected, fees, schedule, service guarantee, and contract duration (Ordre des conseillers en ressources humaines agréés (CRHA) [Quebec's order of certified human resources advisors], 2021).

CREATING A SELECTION COMMITTEE

The Selection Committee's role is very important in ensuring that new hires are in synch with your organization's overall strategic needs. The choice of Selection Committee members – Directors with the greatest recruiting experience in philanthropy, or active involvement in the fundraising strategy – calls for careful consideration. Usually we recommend a maximum of three persons (for example, the Chair of the Board of Directors, another Director, and a senior manager).

An ERC provides real value added in accompanying the process, by structuring committee meetings, drawing up a clear schedule, and ensuring that deadlines are met. This person's listening and reformulating skills allow you to consider your recruiting decisions objectively. Acting as a coach, this person helps new hires become part of your organization during their first six months.

THREE REASONS TO MAKE USE OF AN ERC SPECIALIZING IN PHILANTHROPY

- As former managers or officers in the field, ERCs have performed executive duties and speak your language.
- ERCs know the market: the organizations from which to recruit, the best candidates and their backgrounds, and up-to-date compensation factors.
- ERCs' pool of currently available candidates allows them to act promptly.

SOME TIPS

- Prepare your action plan and strategy before creating your Selection Committee.
- Listen to Selection Committee members, in order to motivate them for the long term.
- Define and allocate Selection Committee members' roles and responsibilities.
- Draw up a clear schedule with tight deadlines to maintain momentum, stay motivated, and get results.
- Determine who will cast the deciding vote in major decisions, for example, who among three short-listed candidates will be invited to a second interview.



75%

of professionals surveyed said they wanted to switch their field to philanthropy.
(Source: LinkedIn Talents)

ANTICIPATING AND MANAGING RECRUITING CASE STUDIES

- Your current Director is not the right person to take the organization to another level. For example, this person has not raised enough funds to achieve the organization's new objectives, does not have the donor network to support the new fundraising campaign, or has no experience managing a technology transition (for example, from Prodon to Raiser's Edge) or a development directorate restructuring.
- Your Major Donations and Planned Giving Director is retiring very soon, and finding a successor is urgent. This person built up the donation program from scratch, cultivated donor relations for years, knows donors' names and life stories by heart, and wants the transition to be highly professional. What a shame it would be if the organization lost this person's know-how, knowledge and professionalism!
- As part of an annual fundraising campaign, you are accompanied by our consulting firm, BNP Philanthropic Performance. Your organization has no Development Directorate. The BNP consultant will be leaving in a few months and suggests that you hire a full-time manager for the fundraising campaign.

A STRUCTURED PROCESS

An ERC specializing in philanthropy works in stages, accompanying you and your Selection Committee step by step to find the right colleague for your organization. Here's how.

1

With you, an ERC builds a search framework by analyzing your organization, its priorities, and the duties and responsibilities of the position to be staffed, and by reflecting with you on the profile of an ideal candidate.

2

An ERC draws up a job posting in English, French, or both.

3

From its passive market data base, an ERC suggests a list of target organizations and benchmark candidates (persons who are currently employed and not actively seeking another position).

4

An ERC carries out the search, conducts all the long-list and short-list interviews, and provides a chart summarizing information about the applicants including training, remuneration, team management experience and budgets managed.

5

An ERC conducts the recruitment interviews up to the final interview, and assists you in making the final selection, gathering references, signing the contract, and welcoming the successful candidate into their new position.

73%

of executives interviewed prefer a first interview via video, not only via telephone.
(Source: LinkedIn, online survey of 40 executives, February 2021)

CONDUCTING DISTANCE INTERVIEWS

Reality is already post-pandemic. Most recruiting interviews are now conducted at a distance.

PREPARATION

- On the basis of the applications selected, draw up a schedule of all interviews to be conducted. Plan for meetings to last one hour, rather than an hour and half.
- For each position and each interview, prepare a list of questions and a checklist.
- Pay attention to the questions you plan to ask; ideally they need to be prepared with a recruitment professional who is up-to-date on the applicable legislation (Quebec's *Charter of human rights and freedoms* (CHRF), the *Civil Code of Québec*, relevant case law).
- Plan who will sit on your Selection Committee.
- Ensure that you are in a quiet part of your home or office, where the interview will not be disrupted by family members or other persons.
- For video interviews, keep your home or office background clean and tidy. Maintain a highly professional personal appearance. Working from home does not exempt you from representing your organization.
- Ensure that the lighting in your location is adequate for a video interview. Test the video and the audio.
- Call the candidate the day before the interview to confirm the time and the agenda.
- Leave 30 minutes' free time between interviews to read your notes in the guide and reach an evaluation of the candidate.

DID YOU KNOW?

Be careful! Under the CHRF, you do not have the right to ask a candidate if they own a car, or if they are a Canadian citizen. Lawsuits are costly in terms of time and money, and so delegating the process to an expert is highly advisable.

FIRST INTERVIEW

- Relax. Smile. Check your personal appearance and clothing. Be aware of your non-verbal communication. Remember that you represent your organization.
- Turn off your cell phone, or set it to airplane mode. Be sure you have the interview guide and checklist, a pen, and a timer other than your cell phone.
- Work through the questions in the interview guide. Take note of the candidate's non-verbal communication.
- When there are several candidates, it's important to note down a few neutral details of their physical appearance (for example, blue glasses with square frames, red tie) so that at the final selection stage you can recall who is who.
- Allow 10 minutes for questions at the end of each interview, without exceeding one hour. Be sure to respect each candidate's valuable time.

SOME TIPS

- **Technology:** Use the right technology (for example, Teams, Zoom, Blue Note). Before the interview, download the application onto your cell phone, tablet or computer. Test it.
- **Camera and posture:** Without being too far away from the screen, ensure that on camera you appear centered and at eye level, and that your face and head are fully visible in the video frame. Remember that you represent your organization.
- **Choice of location:** Choose a location free of ambient noise. Do not conduct an interview in the kitchen surrounded by children, or in a car, which makes your management style appear unprofessional.
- **Non-verbal communication:** Non-verbal communication covers a great many parameters. The most important thing to remember in this context is to make eye contact when speaking with the candidate. Otherwise, you send a message that you are breaking contact and not really listening to the candidate.
- **Consistency:** Be sure to provide the same conditions for all candidates. A recruiting process is intended to be fair and equal, right down to the small details.

SECOND OR IN-PERSON INTERVIEW

By the second interview, it's best to have two or at most three remaining candidates. This means that the Selection Committee and its Chair will need to make a series of decisions following the first interviews.

We have developed three **key guidelines** for conducting **in-person interviews** in a **post-pandemic** context.

Even in a post-pandemic context, public health requirements remain in effect: wear a mask; keep your distance; respect sanitary procedures.

1 Prepare everyone who will take part in the interview: inform the candidate and Selection Committee members of the sanitary procedures to be respected, a few days before the interview.

2 Respect the candidate's time: in the present situation, the candidate may be responsible for child or elder care.

3 Don't have too many people present in person: it's best if some Selection Committee members take part via video.

WELCOMING AND INTEGRATING NEW HIRES, VIRTUALLY

CLEAR COMMUNICATION AT MEETINGS

When welcoming and integrating a new hire, remember the turbo principles of communication (Isabelle Lord, *The Inspirational Manager: The 10 Rules of Leadership Communication*).

In one of her training sessions, Isabelle Lord notes:

"In video communication, prepare ahead of time, and always remember who you're speaking to (your audience), why you're speaking (your reason), what your message is (your purpose) and how you're conveying that message (your communication channel) ».

Here are some more tips from Isabelle:

- In working virtually with a team, clarity and conciseness are the watchwords. Avoid blurring your professional life and your private life; for example, bemoaning your family situation or gushing about your pet at a meeting is not professional conduct.
- Shorten meeting time; get good at summarizing.
- Non-verbal communication is huge. A calm, steady demeanour relieves nervousness and reassures other meeting participants. Don't neglect this aspect of netiquette!

PLANNING FOR MEETINGS

When preparing for meetings during a pandemic, taking the pulse of the group and learning what people are concerned about will allow you to draw up a better agenda.

You will need to develop your active listening skills, including oral and written reformulation. How are other attendees reacting? Pay attention to non-verbal communication. Ask feedback questions such as "Was that clear?" or "Are there any questions on that point?"

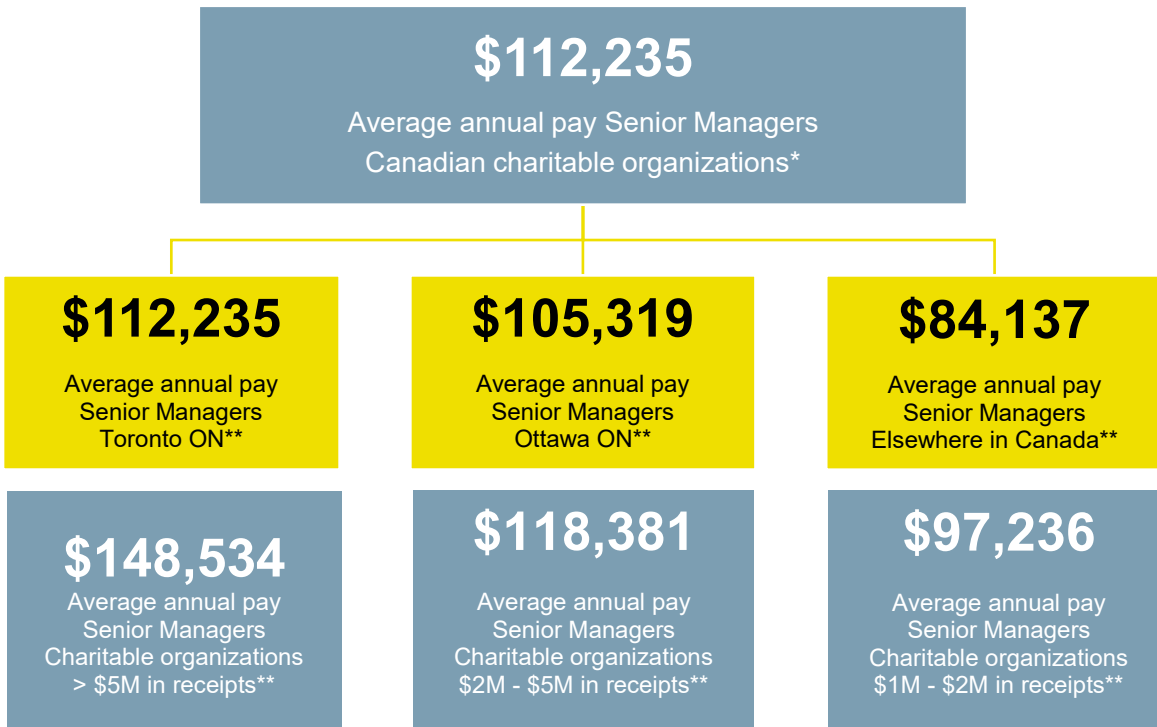
After the meeting, send out a **"Game Plan" email** message, clearly setting out objectives, action to be taken, and target dates.

OFFERING COMPETITIVE COMPENSATION

SOME FACTS AND FIGURES

- According to the Association of Fundraising Professionals (AFP), pay is highest in Ontario and Quebec.
- In philanthropy, most employees are women, who are paid 20% less than men.
- The AFP now includes pay scales in its job offers, to ensure that women's pay catches up with that of men.
- The AFP notes that the main reason individuals change jobs in philanthropy is not mission, but compensation.

SENIOR MANAGERS' COMPENSATION, CHARITABLE ORGANIZATIONS



SENIOR MANAGERS' COMPENSATION, BENEFIT RANKING

- | | |
|------------------------------|-----------------------|
| 1. Health insurance | 4. Other benefits |
| 2. Child and family benefits | 5. Community benefits |
| 3. Social services | 5. Education benefits |

*Source: Payscale Canada

**Source: Charity Village

ENSURING DIVERSITY

Philanthropy stands for diversity: donors, beneficiaries and personnel are all diverse. But what exactly do we mean by diversity?



ADYA AFANOU,
CONSULTANT IN PHILANTHROPY:

Diversity isn't just a group characteristic; it's an individual trait as well. Individual identity has many aspects. Some of them evolve over a lifetime, depending on opportunities that arise and choices that are made. Others remain constant. Still others are outside a person's control. These facts mean that diversity is inevitable. No one is only a single trait at any given time, and individuals identify with more than one group. As well, consciously or unconsciously, people see various characteristics in others. A person is more than just their occupation, their gender, their skin colour, their age or their address. Recognizing, respecting and indeed cherishing these differences is a profoundly personal journey every human being. Transferring that individual awareness to the organizational level is a challenge. But there are tools available, and studies show that investing in diversity, equity and

inclusion at all organizational levels pays off in teams that are happier and more effective and organizations that are healthier.

Recruiting for diversity means challenging recruiting processes and identifying and eliminating cognitive biases. In fact, studies show that diverse teams are better at seeking out new markets and envisioning more effective organizations.

DIVERSITY 101

Diversity

The AFP defines diversity as a core value. It is an inclusive concept encompassing, without limitation, race, colour, ethnicity, gender identity, sexual orientation or identity, religion, nationality, age, economic class, educational level, language, physical, mobility and ability, geography, and marital and parental status. The state of being diverse means having the broadest possible representation of individuals, experiences, and perspectives in all-encompassing terms.

Equity

Creating a level playing field for individuals or groups according to their respective needs, which may include equal treatment or treatment that is different but is considered equivalent in terms of rights, benefits, obligations and opportunities.

Inclusion

The ability to attract, retain, accommodate, and involve a range of diverse people who are valued, accepted, and comfortable at the international, national, regional or local level.

"Diversity is a fact, equity is a choice, inclusion is an action, belonging is an outcome."
(Arthur Chan)



SOME STATISTICS

SEX

- In the social service sector, most professionals (77%) identify as women.
- Fewer than four organizations out of 10 have equal representation of both sexes on their Board of Directors.
- According to Philanthropic Foundations Canada (PFC), 62% of Canadian foundations stated that they have more men than women Directors.

AGE

- The average age of employees in the social service sector is 45.
- On Boards of Directors of Canadian foundations, most members are over 50, 41% are between 50 and 64, and 26% are over 65. Only 17% are under 39 (PFC).

ETHNIC ORIGIN

- Among employees in the social service sector, 15% indicated an ethnic origin other than White non-Hispanic.
- At the 20 largest private-sector foundations in Canada (with estimated combined assets of \$32B), members of the Boards of Directors are almost all white, and 13 of the 20 foundations are exclusively controlled by family members.
- Among the 78 members of the Boards of Directors of Canada's five main community foundations (located in Vancouver, Victoria, Winnipeg, Toronto and Montréal), only five are Black, five are Indigenous, and 10 others identify as persons of colour. These organizations' combined assets are estimated at \$3B.

How can your organization become more inclusive?

- Use inclusive (gender-neutral) language in position descriptions.
- Hire for character and inner values; training can come later.
- Re-think some prerequisites. For example, instead of requiring 10 years' fundraising experience, why not ask for five years' experience and build up a promising next generation of executives?
- Look at your Board of Directors: does its membership reflect the diversity of your donors and the people your organization serves? If not, it's high time for some changes!

TO SUM UP

As a first step toward greater inclusiveness, charitable organizations need to look inward, at their own leaders, personnel and volunteers. Only then can they become sustainable and promote a culture where fair and balanced representation is a reality for everyone.

WHY MAKE USE OF BNP HUMAN RESOURCES

Why make use of BNP Human Resources, as either an executive recruiting firm or an ERC?

THREE MAIN REASONS

1 Because we ourselves are former executives in philanthropy. We have recruited executives for major donation and planned giving departments, large-scale solicitations, data base analysis and administration, to name only those areas of expertise.

We know how a campaign or a planned giving program works, from the inside out. We know the difference between an annual donations specialist and a planned giving specialist.

2 Because we have over 30 consultants in all parts of Canada who share the values of mutual assistance and commonality. These shared values mean that if one of us initiates a search, the 29 others lean in to help find the right person for your organization. Shared values also limit the possibility of errors of judgement, because we share the profile of your organization's ideal candidate.

3 Because our team embodies diversity in all its dimensions. We have extended networks in many of Canada's cultural communities.

DID YOU KNOW?

It takes 50 to 100 or more hours to recruit the best candidate!

Analyzing the market, earmarking the best applications, contacting applicants, conducting initial telephone interviews, keeping the client organization informed, conducting further interviews to identify individuals for recommendation, and writing the final report: getting good results is a lot of work!

A word about working in a post-pandemic context: Hiring an ERC in philanthropy offers you not only a virtual process, but also an accurate analysis of the market.

ABOUT BNP HUMAN RESOURCES

BNP Human Resources, a division of BNP Philanthropic Performance, offers you a clear view of all aspects of human resources management, thus ensuring that your organization is sustainable. We work with your Board of Directors, Human Resources Committee, senior management, employees and volunteers to maximize your organization's internal capacity to carry out its mandate on the ground.

The vital basis of our consulting role is our interlocking understanding of philanthropy and human resources management. Our approach is both strategic and hands-on, and will allow you to develop a human resources management stance that is coherent with the philosophy of philanthropy and the DNA of your organization. We want to simplify your life. That desire means that we are present, available and listening. All the time.

TEAM

Esther Tranchemontagne



Central to philanthropy: management from a human perspective

Following four years as the first lay director of residence services at her alma mater, Collège Jésus-Marie in Sillery, as well as dedicated involvement with the college foundation's board of directors, Esther decided that professional philanthropy was for her.

Esther then worked at Campus Notre-Dame-de-Foy as event planner for this college's conference services and co-ordinator of its major fundraising campaign. Drawing on her additional awareness of entrepreneurship gained from experience in retail sales, Esther became convinced that the social economy would benefit from a more robust culture of philanthropy. To put her knowledge and expertise at the service of the community and make a

difference, she joined BNP Philanthropic Performance.

Esther changes the world in her own way: one day at a time, one client at a time, one cause at a time. She is proudest to see clients succeed who have had an unusual or a winding path to follow. In accompanying clients, promoting their growth and developing their talents, Esther's experience in the field of education constantly reminds her that people are central.

A memory that Esther cherishes is the training and the introduction to the world of philanthropy that she received from Jean-Robert Nolet, joint founder of de BNP Philanthropic Performance. The knowledge she gained has provided an incredible

opportunity for her to serve clients with discipline and professionalism, while promoting healthy work-life balance.

Good causes that are a good fit

In Esther's view, different causes are a good fit at different stages of our lives. These days she is an ambassador for the Quebec YWCA and its benefit gala evening, De l'ombre à la lumière [from the shadows into the light]. Inspired by women's resilience and perseverance, she rediscovers courage and solidarity in each woman she meets.

Also an ambassador for the Laurent & cie philanthropic fund, Esther supports and accompanies its development team. This fund assists the families of children with cancer or "orphan diseases", diseases that are so rare that there is little incentive to develop treatment for them.

To encourage and expand skills-based volunteering, for the past two years Esther has been proud to endorse and promote Bénévoles d'expertise (BE), an expert volunteer matching organization.

Lily Serreau, CHRP



Audacity is finding solutions together

From an interfaith multicultural family, with a French Roman Catholic father and an Israeli Jewish mother, Lily has known philanthropy all her life. Both sides of her family were involved in giving back (for example, at local food banks, a women's association, and Doctors of the World). Lily's father, a physician, passed on to her his altruism, honesty and generosity. Previously responsible for communications and philanthropic development at the Fondation HÉC Montréal [the foundation supporting the École des Hautes études commerciales (HÉC) school of business administration in Montréal], Lily helped design and implement numerous projects including a video highlighting various forms of planned giving. The video was shot at the Édifice Viger, the HÉC's first building in Montréal, with donors and scholarship recipients in attendance. A graduate of HÉC herself, Lily is very proud to have contributed to this project and to have seen the generosity of former students, not all of them wealthy, and the extent of the impact of planned giving.

In 2019, Lily joined BNP Philanthropic Performance to develop its human resources. She wants her new department to take off so that client organizations can benefit from turnkey

solutions developed by this consulting firm. Every day, she is in contact with exceptional persons: managers and executives in the field of philanthropy who are taking action to bring about a better world. Lily finds her work a real source of optimism.

Lily cares about education and young people. She feels that change happens when we challenge our assumptions, become better persons and create a fairer and more creative society.

Lily sits on a committee of the International Bureau for Children's Rights. Previously, she was a volunteer with the YMCAs of Québec.

Believing that there is always a solution, Lily exercises resilience and patience each day. Together, as a team, we're stronger!

Daniel Lanteigne, ASC, C.Dir., CFRE, CHRP

Moving philanthropy forward with authenticity and goodwill

Several years of volunteer involvement gave Daniel a special connection to organizations, made him realize their impact on people's lives, and led him to make an even greater contribution by pursuing a career in philanthropy. He then worked for the War Amputees Association and the REA Foundation [for physical rehabilitation] in development, communication and senior management positions.



In 2020, wanting to extend his focus to relevant hands-on work with organizations, Daniel joined BNP Philanthropic Performance. His projects have allowed him to witness accomplishments that have reduced inequality, improved living conditions, and promoted investment in a better future. Daniel is motivated by difficulties: if a client organization feels blocked, Daniel shifts into high gear, unravelling complex situations and looking at them from every possible perspective.

An ardent champion of philanthropy professionals and the vital contribution they can make, Daniel is a lecturer in the certificate in philanthropy management program at the Université de Montréal, and has supported professionalism in philanthropy in numerous articles, interviews and talks. While the role of philanthropy and careers in this field are not yet well understood, they are essential in ensuring effective intervention with the public and better management for organizations and their boards of directors.

An active philanthropist starting at age 4

Following an accident, Daniel was registered with the War Amputees Association, an organization that has supported him throughout his life and helped make him the person he is today. Starting at age 4, Daniel became an ambassador for the War Amps, encouraging people to support this cause and to take care to avoid an accident like the one that happened to him. That promotion marked the start of his philanthropic activity, which has continued to grow ever since.

Today, Daniel continues to support the War Amps and several other organizations including the Fondation Émergence, of which he is a governor. He also sits on a number of committees, including the National Advisory Committee to Canada's Volunteer Awards Program. An active member of the Association of Professional Philanthropists, Quebec Chapter, he is slated to become the chair of its board of directors in 2021

Daniel is moved by outpourings of solidarity. He is consistently impressed by the resilience and fighting spirit of communities in emergency situations. Initiatives such as the Detroit Grand Bargain encourage Daniel to believe that philanthropy isn't just a band-aid solution, but has the power to change the world.

Daniel is proud to live in a world where, despite self-absorption, goodwill never gives up and never gives in. While tragic, game-changing events have marked recent years, philanthropic response remains constant. That is why we can hold on to hope: hope that the most vulnerable will be protected, that inequities will be attenuated, that injustices will be remedied, and that everyone will have the right to equal opportunity.

We adhere to the [CPHR Code of Ethics and Rules of Professional Conduct](#).