



RISING TO THE CHALLENGES

A special report for leaders in
Canada's health care philanthropy sector

What Canadian health care foundations and charities are doing to recruit
and retain the fundraisers they need – and how they can do it better



CONTENTS

Research methodology	3
Finding the right fundraisers for one of the most important jobs in the world of health care philanthropy	4
Current recruiting practices: traditional tactics, little innovation	5
The BIG challenges	
1. <i>Recruiting good fundraising people is a top priority, and a key concern</i>	7
2. <i>Retention issues go hand-in-hand with recruiting</i>	11
Overcoming the top obstacles to hiring top talent	
1. <i>Cultivate a true philanthropic culture</i>	16
2. <i>Diversify recruiting strategies</i>	18
3. <i>Amplify engagement and retention</i>	22
A place to start	28
Appendix: Quick read, Quick print	
<i>Highlights of research and solutions</i>	29
About crawfordconnect	



Deborah Legrove
President, crawfordconnect

Why do we have such a tough time finding good fundraisers?

Why is turnover so high?

What are organizations in our sector doing to recruit and retain top talent?

Over the past decade working exclusively in recruiting for the non-profit sector, I've been hearing questions like these more and more frequently – especially among leaders in the field of health care philanthropy.

With their attention focused on pressing organizational priorities, leaders and senior managers in hospital foundations and health care charities don't have many opportunities to share this kind of helpful information. Still, they are eager to know how others in the sector are recruiting skilled fundraisers – and what ideas they can use in their own organizations.

Given the importance of this sector to Canada's health care system – how philanthropy supports building hospitals, purchasing medical equipment and funding medical research and health care programs – and the fact that so many leaders are looking for answers, we at crawfordconnect decided to delve deeper. We wanted to learn more about the specific challenges these organizations are experiencing, as well as their successes – with a view to gaining insights and offering solutions that are, importantly, practical.

We decided to initiate groundbreaking research: purely Canadian research about recruiting the fundraisers who enable Canada's health care charitable sector to achieve their missions. We asked the respected Beslin Communication Group to explore the current state of fundraiser recruitment among Canada's hospital foundations and health care charities across the country. Beslin conducted in-depth confidential interviews with 80 organizational leaders to gather extensive input.

The results are revelatory. They present a definitive picture of what the sector's leadership is dealing with as they strive to find and retain talent that is critical to their success.

And so, for all of you working in the important, often undervalued, field of health care philanthropy, *Rising to the Challenges* is for you. The first of its kind in Canada, this white paper presents an in-depth view of the concerns and struggles of the leaders in this sector in seeking essential development staff (The BIG Challenges, page 7) It also provides a path to success. Studying the issues revealed by the research, as well as the recruiting techniques shared by interviewees that have worked well for them, the crawfordconnect team applied our collective decades of experience as executives and recruiters for Canada's non-profits to propose fresh ideas and more than 30 potential solutions (Overcoming the Top Obstacles to Hiring Top Talent, page 15).

For the boards of directors, leaders and fundraisers of this country's vital hospital foundations and health care charities, we hope *Rising to the Challenges* provides you with insights that will enable you to find the fundraisers who will strengthen your teams and further your missions.

I welcome your questions and comments.

Deborah

RESEARCH METHODOLOGY

The data in this white paper are based on compilation and clustering of responses collected in telephone interviews with 80 participants – CEOs, executive directors and senior managers in fundraising health care organizations from across Canada. The 30-minute interviews were conducted between December 2018 and April 2019.

All research was conducted according to generally accepted research guidelines designed to ensure objectivity and personal confidentiality and to achieve a strong level of confidence that the information is accurate and reflective of the sector.

Telephone interviews, conducted by an independent researcher, were determined to be the preferred method as they offered broad geographical access and the opportunity to capture high-quality responses, including perceptions and opinions. The methodology also included topical secondary and online research.

The research encompassed a pilot study to validate the topic and ensure the effectiveness of the proposed questionnaire, followed by field research involving comprehensive phone interviews based on a standardized questionnaire.

Interviewees included:

- CEOs/EDs in Canadian hospital foundations and health care charities
- VPs/senior fundraisers in hospital foundations and health care charities
- Influencers in the field of health care philanthropy

	HOSPITAL FOUNDATIONS LARGE (20+ STAFF)	HOSPITAL FOUNDATIONS MEDIUM (10-20 STAFF)	HOSPITAL FOUNDATIONS SMALL (5-10 STAFF)	HEALTH CARE CHARITIES	HEALTH CARE PHILANTHROPY SECTOR INFLUENCERS	TOTAL INTERVIEW COMPLETIONS
Total Interviewees	20	17	12	21	10	80

- Preliminary research determined that the key differentiator in how these organizations function is size, based on number of employees, since this determines overhead, operating expenses and workplace environment.
- The research encompassed a national sample involving interviewees from western, central and eastern Canada.

FINDING THE RIGHT FUNDRAISERS

for one of the most important jobs in the world of health care philanthropy

In the world of philanthropy, fundraisers work in a wide variety of positions and are central to the success of their organizations.

From multimillion-dollar national organizations to small, local charities, every hospital foundation and most health care charities need to fundraise. Their ability to deliver and expand their mission depends on recruiting the right professional fundraisers.

There are approximately 85,000 ¹ registered charities in Canada, some 5,100 ² of which are public foundations. These organizations need qualified, capable people to generate revenue by building relationships with individuals, corporations, foundations and others, increasing contributions and exploring new opportunities to raise funds.

From major gifts, to planned, annual and corporate giving, to special campaigns and special events, fundraisers wear diverse hats and are invaluable members of charity and foundation teams. The right hires enable organizations to raise the financial support needed to meet their mandates.

The wrong hires can derail strategic plans, disrupt programs and diminish precious donor dollars.

The *2018 Annual Giving Report* by CanadaHelps points out there is an emerging funding crisis in the philanthropic sector and charities will be stretched thin to keep up with demand for services. The report indicates that 30% of donations are at serious risk of exiting the charitable sector within the decade because giving is down in both gift amounts and number of people donating. At the same time, demand for services is rising because of consumer and demographic trends.

Increasingly there will be collisions between funding and service delivery - and a growing need for skilled fundraisers.

¹ Imagine Canada

² Philanthropic Foundations Canada



“The fundraising sector is already in crisis because of limited pools of fundraising talent.”

CEO, special hospital facility

CURRENT RECRUITING PRACTICES

traditional tactics, little innovation

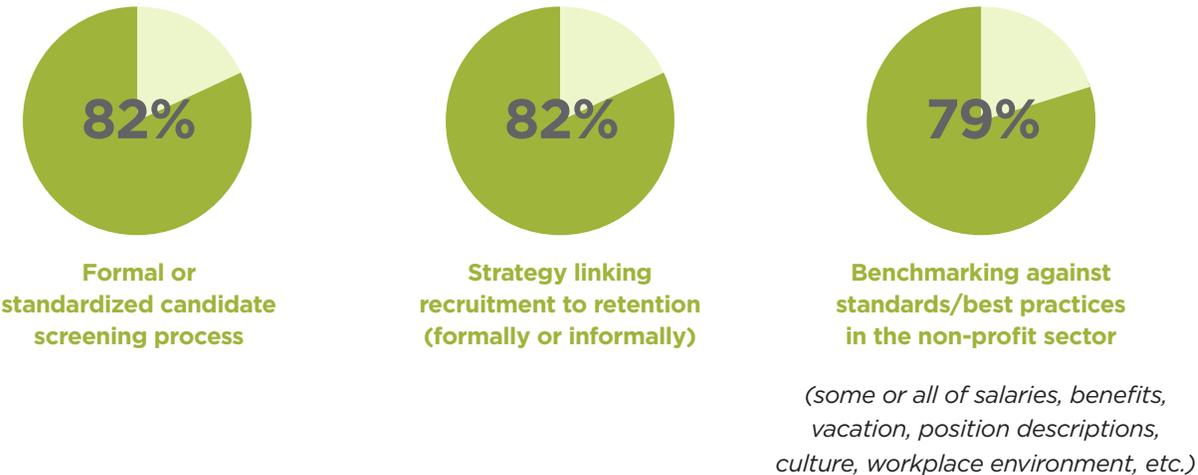
So how do hospital foundations and health care charities go about recruiting and selecting the fundraisers they need? In general, they appear to stick with tried-and-true traditional practices, rather than devote precious time to new methods.

Most organizations (64% of interviewees) follow a similar standardized, conventional process that typically includes the following steps.

1. Review/revise job description - usually a responsibility of the hiring manager
2. Post description internally and externally on sites including Association of Fundraising Professionals, Indeed, Charity Village, and occasionally, others
3. Receive, track and sort applications and resumes
4. Screen potential candidates by phone
5. Create a short list of three to five candidates
6. Conduct two rounds of interviews using panels (varying composition, organized by the hiring manager) based on standard questions and scoring
7. Hiring manager conducts reference checking
8. Extend offer, negotiate, finalize

COMMON RECRUITING SUPPORT STRATEGIES

To support recruiting efforts, most of these organizations (more than three-quarters of interviewees) incorporate three practices, which are common in the non-profit sector.



WHO'S RESPONSIBLE FOR RECRUITING?

When it comes to responsibility for hiring, the individuals and groups are very similar among hospital foundations and health care charities.

CHIEF EXECUTIVES AND SENIOR MANAGERS: When recruiting for direct reports, chief executive officers/executive directors, vice-presidents, directors and managers are very involved in the process. For positions other than direct reports, CEOs and EDs are occasionally involved at the end of the recruiting process. For example, they may meet with candidates to ensure a cultural fit. When it comes to peer positions, other senior executives and managers sometimes participate on interview panels.

HUMAN RESOURCES DEPARTMENTS: In organizations with access to HR departments, foundation and charity leaders prefer to take responsibility for recruiting and hiring. They believe they have a better understanding of fundraising and fundraisers. HR staff do not typically serve an active role in recruitment; instead, they serve functional roles such as reviewing salary level, placing job postings, receiving resumes and sometimes screening candidates, preparing offers, onboarding and providing administrative support.

Among very large hospital foundations and health care charities, internal HR departments or a dedicated HR resource provide comprehensive support and are actively involved with the process. This role is often referred to as a “partnership.”

EXECUTIVE SEARCH FIRMS: Some organizations use executive recruiters for senior management positions, typically director level and above.

EXTERNAL HR CONSULTANTS: Some organizations work with external HR consultants to provide general support related to human resource issues and organizational matters. Occasionally, these consultants support recruitment efforts.

SOME CUSTOMIZE THE PROCESS

A minority (36%) of the organizations participating in the research appear to follow a process that's customized to the position for which they are recruiting or to the organization's needs and priorities. This enables them to refresh and adapt strategies and to allow the individual responsible for hiring to develop an approach they believe will work best. Here are some examples.

- Leverage personal networks and relationships to find the talent “gems”
- Search LinkedIn regularly for information on candidates
- Involve peers to ensure collaboration and teamwork
- Include board members or representatives from the hospital side in recruitment (e.g. on interview panels)
- Combine behavioural questions with a writing skills assignment (e.g. preparing a one-page project statement with key steps)
- Take short-list candidates to lunch or coffee for a chat
- Utilize a scoring system to eliminate bias during interviews
- Employ a customized skills matrix for candidate screening to align skills, experience and behaviours with organizational needs

THE BIG CHALLENGES

RECRUITING GOOD FUNDRAISING PEOPLE IS A TOP PRIORITY, AND A KEY CONCERN

While the senior people working in Canada's hospital foundations and health care charities juggle many pressing demands, recruiting talent is among the top priorities.

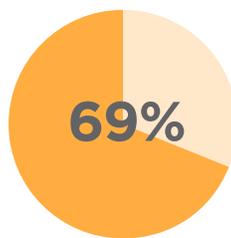
They aren't thinking about finding good people only when they need to fill a position; rather, because there's constant staff turnover, this is something they contemplate often.

Among foundations, finding talented people is not only a priority for managers, it's often an organizational priority and is included in the strategic or operational plan.

For virtually all of these organizations, there's an important link between talent recruitment and leadership development. They understand that effective recruitment helps to develop a pipeline of future leaders.

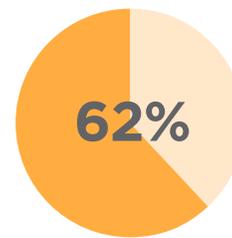


There is an important link between talent recruitment and leadership development



Talent recruitment is an organizational priority included in the strategic and/or operations plan

(A minority of interviewees with health care charities indicated this)



Talent recruitment is a top-of-mind priority

(Interviewees with health care charities were more likely to indicate they focus on recruitment only when necessary)

“ We’re stuck in our ways; we need to move away from typecasting and explore more when it comes to recruiting talent.”

Executive, charity

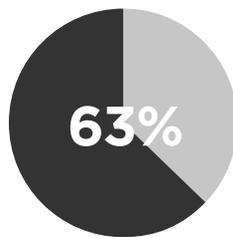
IT'S REALLY, REALLY HARD TO FIND PROFICIENT DEVELOPMENT STAFF

At the same time, most acknowledge that it's difficult to find qualified fundraising staff. *Very difficult.*

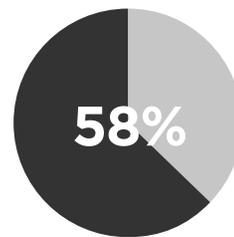
There simply aren't enough qualified fundraisers to meet the need. Given the aging Canadian population, demand for services in the health care sector will continue to increase, in turn driving demand for fundraisers among foundations and charities. Concurrently, more and more baby-boomer senior fundraisers will be retiring.

Not surprisingly, then, the majority of executives and senior managers also believe that recruiting good people is primarily an issue of supply and demand.

Among the minority who disagree, they point out that recruiting the right people also depends on an organization's reputation or brand along with the ability to effectively access personal networks and innovative sources such as donor organizations and non-traditional sectors.



It is extremely or very hard to find qualified fundraising staff



Talent recruitment is mostly a supply-and-demand challenge, dependent on market conditions

COMMON ISSUES: TECHNOLOGY, MILLENNIALS, FUNDING, WORK ENVIRONMENT

Any organization is only as effective as its people, so it's essential that hospital foundations and health care charities are staffed for success. But this is a tough task in the face of additional recruiting issues they encounter.

Lots of competitors for talent, little budget for recruiting and retention

The right recruitment strategies and tools are critical for non-profits and charities to attract and retain the best talent. But for the fundraising health care organizations that don't have comparable budgets to larger organizations competing for the same talented people, hiring qualified staff within a limited budget is a major obstacle.

Among interviewees, 71% consider the corporate sector a competitor for talent, along with community services and long-term care organizations. At the same time, these are also considered sources for recruiting fundraising talent.

“The reputation you build makes a huge difference in recruitment.”

Vice-president, large hospital foundation

Low use of technology and data analytics

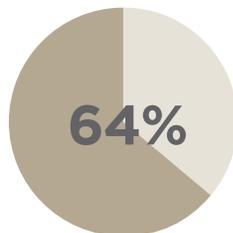
While technology and data management are widely used in many sectors to enhance the efficiency and impact of the recruiting process, only a minority of organizations in the health care charitable sector do so. Just 32% of participants indicated using specialized recruitment technology or software, including those for question-building, personality assessment, behaviour prediction and profiling for cultural fit.

Neither do many use data analytics, which can benchmark and predict an organization’s talent needs, and help to establish realistic expectations for candidates about how they will integrate into an organization’s plans. Only 24% incorporate the strategic use of data or metrics into recruiting. This means few add metrics or financial targets such as revenue or gift size into job descriptions.

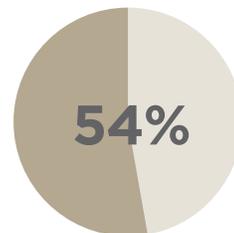
Millennials are tough to recruit, and very hard to keep, in these demanding work environments

Organizations in the sector rely on altruistic and passionate individuals to raise funds for their mission. More and more often these individuals are Gen Z and millennials.

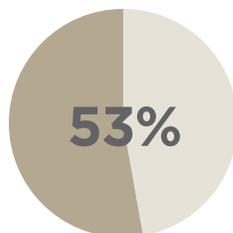
According to many interviewees, it can be difficult meeting these individuals’ high expectations for advancement and more challenging projects. And the reality of demanding, fast-paced work environments and ambitious fundraising targets often leads to burnout and rapid turnover. So, retention is also an issue.



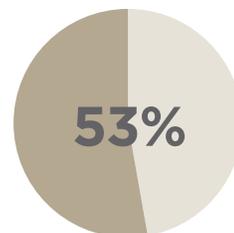
We are not good at using data for talent-related analytics



It is hard to recruit and retain millennials



Funding prevents us from achieving our talent recruitment priorities



Our work environment needs to improve to attract the best talent



“Work-life balance and flex-time are critically important in our organizations.”

Vice-president, large hospital foundation

“We have a talent shortage and yet we set people up to fail by not providing professional skills development.”

Influencer with long tenure in health care philanthropy

“We lose lots of people to poaching who think the grass might be greener elsewhere or move into management roles for which they may or may not be qualified.

The competition is stiff, and we constantly have to meet the challenges our budget and location present.”

CEO, mid-size hospital foundation

RETENTION ISSUES GO HAND-IN-HAND WITH RECRUITING

Nearly all – 96% – of the leaders interviewed say it is important to put as much or even more emphasis on retention as well as recruiting. Many lament the “revolving door” of skilled staff.

The costs of turnover can vary markedly from one organization to another, but overall, they are challenging for most of these organizations. The direct costs of hiring someone new can be secondary considering the larger impacts on productivity, morale and reputation.

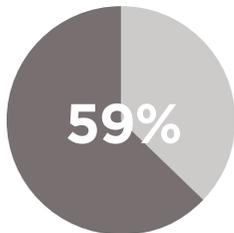
Trying to retain with a variety of incentives

Most (58%) research participants said their organizations provide incentives to help retain fundraisers. Professional development, education and training are the most common, although many of these leaders also feel constrained by low budgets that limit their ability to provide robust incentives.

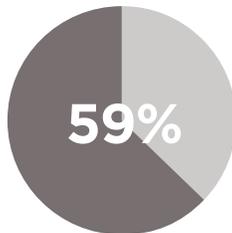
For hospital foundations, generous pension and benefits plans represent inducements for both recruitment and retention; some refer to it as “the ultimate incentive for staff retention.”

Flex-time is also a coveted incentive, with more and more people seeking work-life balance and the ability to attend to personal matters as needed.

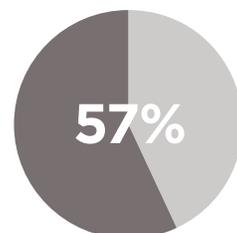
INCENTIVES PROVIDED



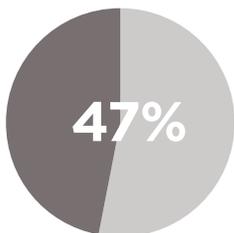
Professional development, education and training



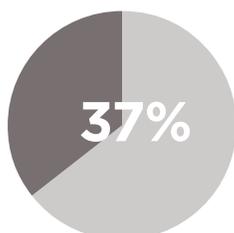
Generous pension and benefits plan



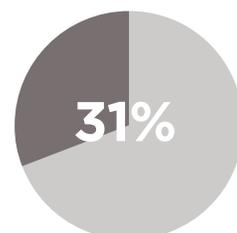
Flex-time



Supportive leadership



Compensation bonuses



Recognition activities

Limited opportunities for career progression

Yet despite incentives, turnover is problematic for many of these organizations. Providing opportunities for career advancement and growth is a major factor in keeping skilled, ambitious employees. Today, talented workers expect frequent progressive career steps – the ability to access new knowledge and to acquire greater responsibilities.

LITTLE MONEY FOR PD: Most of these organizations don't have budgets for formal retention strategies or professional development programs. They simply allocate some dollars for individuals to attend conferences or courses. Few have performance management or personal improvement plans featuring regular progress discussions with leadership.

LACK SIZE, STRUCTURE OR SCALE: As well, most of these leaders are limited in what they can offer and don't have the organizational size or structure to accommodate movement up the hierarchy. People often leave because they outgrow the organization.

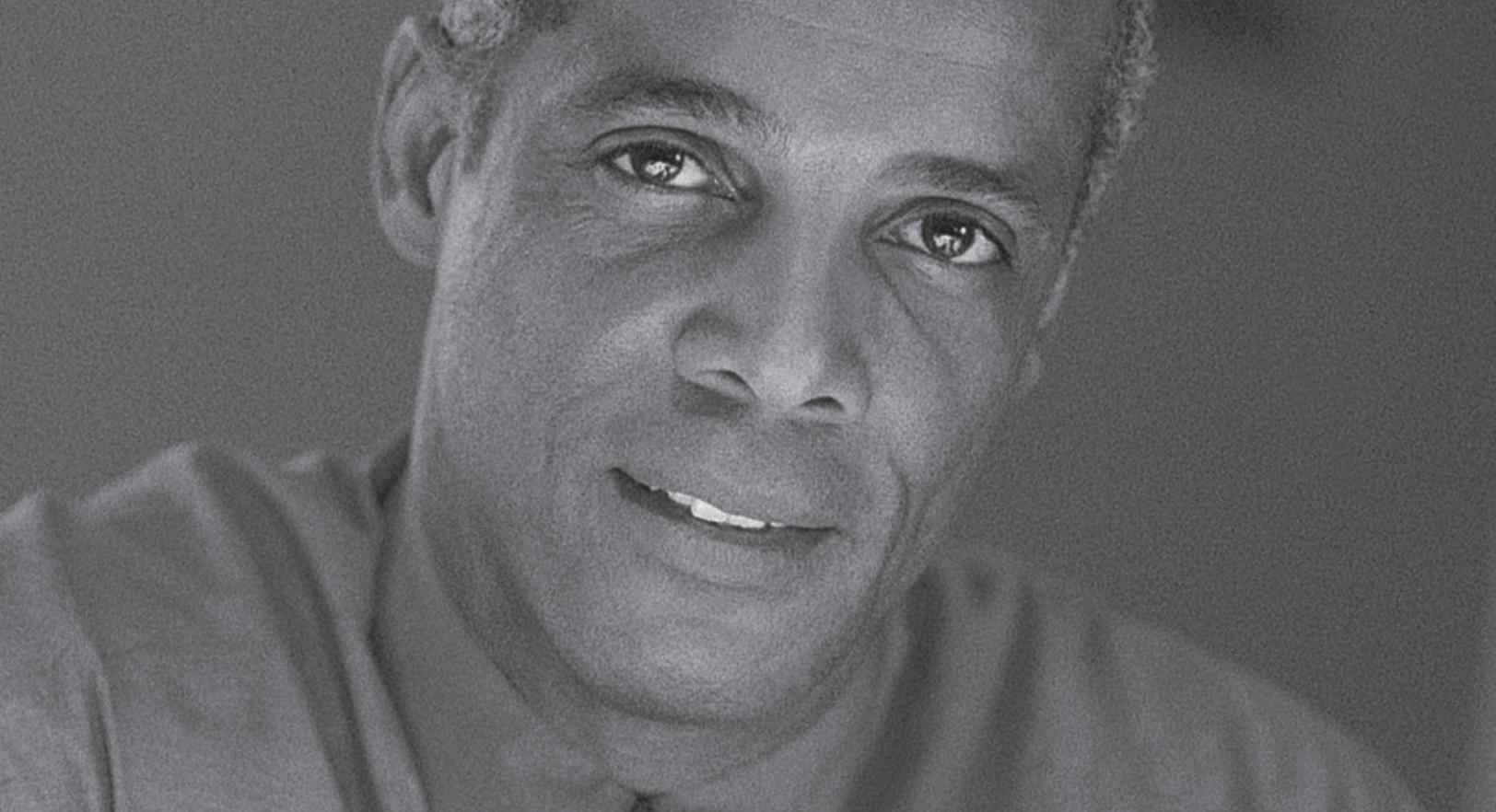
DISCONNECT BETWEEN EXPECTATIONS AND EXPERIENCE: In other cases, departures are a result of misalignment between the expectations of a new role and the actual experience. When individuals starting a position expect a certain working environment and culture, but experience something else, retention is almost always a challenge.

CONFUSING POSITION TITLES: Another obstacle to career pathing is inconsistent and confusing titles among fundraisers in this sector. Job titles are important indicators of what people do, yet fundraising position titles are often unique and don't compare with others in the organizations in which these individuals work.

Boards and even senior management are not always clear on roles and how individuals fit into the organization. This can hamper integration and engagement in the organization, as well as appropriate personal career pathing.

“Often there is too much pomp-and-circumstance in the description of a role when there is actually a lot of grinding work; around prospecting, for example”

Executive director, charity

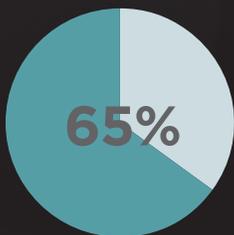


What exactly is a “fundraiser” and what do they do?

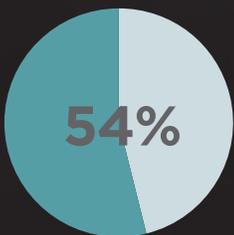
When it comes to the individuals who are directly accountable for fundraising targets in hospital foundations and health care charities, a plethora of position titles contributes to the confusion about their roles.

Advancement Associate - Director of External Relations - Gift Officer - VP Philanthropy - Development Assistant - Gift Planning Associate - Manager Planned Giving - Chief Development Officer

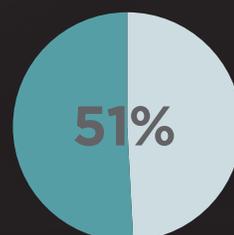
The result? Other employees within these organizations – as well as donors – often don’t know exactly what fundraisers do, which can impact the relationships these individuals strive to build.



People in fundraising organizations have to move out to move up



The fundraising sector needs to be more transparent about the work we do and the expectations of the employees we hire to do that work



Position titles in our field can be a problem when it comes to career development

Missing strong leadership support

Management and leadership largely shape the satisfaction of everyone working in an organization. Fundraisers have high expectations they will have strong support from their leaders. Unfortunately, this isn't always the case; 41% of interviewees say the typical leadership style in fundraising organizations can be a concern.

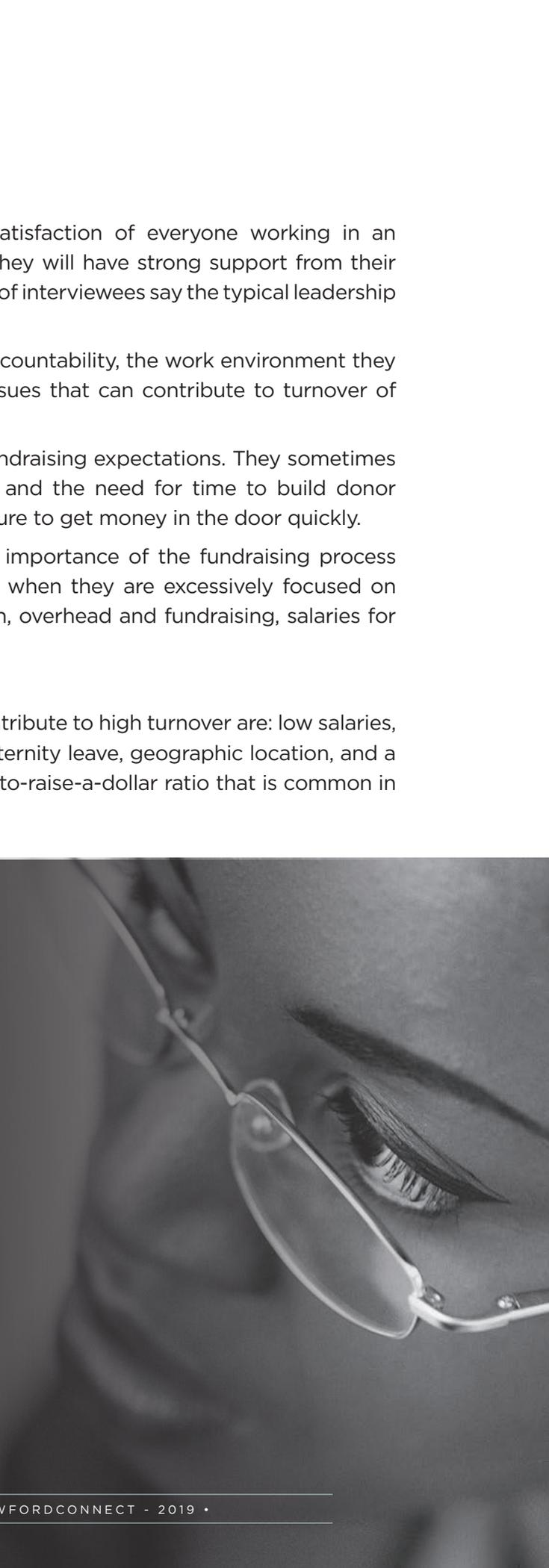
How leaders manage the organization, deal with accountability, the work environment they create, the culture they foster – these are often issues that can contribute to turnover of fundraising staff.

Moreover, boards of directors can have idealistic fundraising expectations. They sometimes lack an understanding of the fundraising process and the need for time to build donor relationships. They can be impatient, exerting pressure to get money in the door quickly.

When boards don't understand or appreciate the importance of the fundraising process and its significance to revenue generation, and/or when they are excessively focused on public perception related to costs of administration, overhead and fundraising, salaries for fundraising staff can be negatively impacted.

Plus, a mix of these factors

Among the other factors interviewees indicated contribute to high turnover are: low salaries, poor benefits, heavy workload with long hours, maternity leave, geographic location, and a mindset focused on compensation versus the cost-to-raise-a-dollar ratio that is common in the sector, particularly among board members.



“What often damages an organization’s reputation is when a leader sets unrealistic expectations, then when the honeymoon period ends, asks the fundraiser how much they raised and demands to know how quickly they will close the target gap.”

Executive, charity

“Too many organizations today are looking for plug-and-play fundraisers because they don’t want to devote time to assess, orient and train employees.”

CEO, small hospital foundation

OVERCOMING THE TOP OBSTACLES TO HIRING TOP TALENT

"It's important for leaders to create recruitment programs and work hard at retention by building a culture based on growth, development and recognition of fundraisers."

CEO, large hospital foundation

No doubt about it - it's getting harder and harder to find the right fundraisers.

The research conducted for crawfordconnect points out the difficult challenges that leaders of fundraising health care organizations are experiencing in attracting, hiring and retaining talent. This research also clarifies the need for a well-thought-out, strategic recruiting process.

To improve results and land candidates who will excel in your organization, the recruiting process needs to change. But what changes work best?

The crawfordconnect team focused our decades of management, recruiting and professional fundraising experience on this question. Integrating this experience with practical suggestions provided by the research participants, we present the following ideas and recommendations to contribute to the recruiting success of Canada's vital fundraising health care organizations.

1. CULTIVATE A TRUE PHILANTHROPIC CULTURE

Most research participants agree the work environment in fundraising health care organizations needs to improve to attract and keep great fundraisers. Often, problems can be traced to the fact that the board and management do not sufficiently embrace and model a culture of philanthropy.

Organizations with a true culture of philanthropy share the following characteristics.

- Every individual in the organization – board member, manager, employee, volunteer – understands that philanthropy is part of the organization’s mission, fundraising is critical to its success and this is a shared responsibility where everyone has a role.
- The board and senior leadership actively promote a culture of philanthropy,
- Organizational practices support fundraising and development.

Helpful resources for developing a strong culture of philanthropy

Donor-Centered Leadership, by Penelope Burk tackles the frustrating and costly problem of high staff turnover and the financial toll it takes on non-profits. Backed by compelling research, this book reveals how non-profits can raise more money by bringing staff attrition under control.

Joan Garry’s Guide to Non-Profit Leadership: Because Nonprofits are Messy should be required reading for the board chair and executive team.

The Association for Health Care Philanthropy (AHP) provides valuable resources and tools. AHP’s Development Primer – a one-day workshop focused on the basic elements of health care philanthropy and the role of development in a health care organization – should be mandatory for any board member, executive or fundraiser who is new to the field.

Harmonize experience with expectations

Too often, new hires find their experience doesn’t coincide with the picture that hiring managers paint of the organization. When someone expects collegial and collaborative but experiences competitive and combative, their tenure is likely to be short lived.

It’s vital to ensure the entire team is aligned with the organizational culture and those responsible for hiring are honest and clear about this culture as well as the work environment and the expectations of the board and management.

“At the hiring stage, clarity re expectations and the nature of the job is super important.”

CEO, large hospital foundation

“It’s essential to educate the board of directors about fundraising, industry standards and processes, and health care philanthropy in general to ensure they are supportive.”

CEO, mid-size foundation

Build and promote a strong employer brand

An appealing brand attracts better candidates and strengthens an organization’s ability to make a quality hire. Do you know the reputation of your organization among job seekers? What are the attributes and values associated with your foundation or charity as a place to work? What constitutes “the best people” you want to attract to your organization? Will these individuals like what they find when they seek information about your foundation or charity?

Focus on the important purpose of your organization, ensuring a positive candidate experience, involving all employees and volunteers as brand ambassadors and promoting your culture among potential recruits and other important audiences.

Provide supportive leadership

To be truly effective, fundraisers need a supportive board of directors and senior executive team. When they trust their leaders, people work harder and stay longer.

Board members and senior executives should provide strong leadership to fund development and participate in the process. All need to recognize the focused team effort that’s required to raise money in an extremely competitive field. They must promote a culture of philanthropy and serve as ambassadors for that culture inside and outside the organization. Training might be needed to reinforce this mindset.

Senior leaders should set an example of a healthy culture

Empower staff to thrive both at work and in life by establishing strategic priorities and policies that support employee work-life balance – and leading by example.

2. DIVERSIFY RECRUITING STRATEGIES

It's a given: there are many more organizations that need to hire great fundraisers than there are great fundraisers.

Despite this growing shortage and tougher competition for talent, hiring managers in fundraising health care organizations tend to return to the same processes and sources that served them well in the past - whether or not these are likely to be the most effective channels today to find the candidates they need.

By establishing a diversified recruiting strategy, hiring managers can avoid an all-of-your-eggs-in-one-basket predicament. Following are suggestions for achieving this.

Tap into grants for students

Grants are usually available for three to four months in the summer and enable an organization to bring in one or two students enrolled in a college or university fundraising program and begin to build relationships. Hiring students helps to create buy-in to the organization and to identify those with the most potential. By maintaining these relationships, when they graduate, these fundraisers may be ready and eager to join your team.

Increase the supply of qualified candidates

While most of the leaders interviewed believe that talent recruitment is primarily a supply-and-demand challenge, it is possible to increase the pool of candidates for fundraiser positions.

It's helpful to start by building a pipeline of future candidates. Unexpectedly losing one fundraiser can be disastrous for some organizations. But being prepared with a list of potential candidates and/or referral sources can make the replacement process fast and productive. Similar to how fundraisers build a pipeline of major gift donor prospects, leaders of fundraising health care organizations should create a list of potential fundraising candidates for the future.

- Consider opportunities to engage passive candidates; even though they may currently be employed, people want to hear about new job opportunities.
- Request referrals from your community of employees, volunteers and donors.
- Actively network at sector events, conferences and workshops.
- Look to past candidates, former employees and interns to build a pipeline.
- Use social media strategically to engage people inside and beyond the fundraising field.
- Search for candidates in non-traditional sectors - people in sales, marketing and financial services with transferable skills such as relationship-building and customer service.
- Consider offering fixed-term contracts with an option to renew for candidates who may prefer a short-term commitment. For individuals approaching retirement or those wanting to "test the waters," this can be appealing.



“Personal recommendations from members of your board of directors, donors and sector colleagues are the best and most productive way to attract good people.”

Senior campaign director, large hospital foundation

Set up an employee referral program

This works well for both recruitment and retention. Reward employees with a recruitment bonus for finding appropriate candidates who are well suited to the organization’s culture and environment. If a new hire stays for a defined period, 18-24 months for example, provide the referring employee with an additional bonus.

Develop clear, complete position profiles

Be sure to clarify expectations for a role and to ensure the job description provides candidates with a transparent picture of the situation. Well-defined job requirements and competencies enable you to develop appropriate interview techniques to determine if someone can actually do the job you want done. Consider:

- the job’s responsibilities and the key duties and skills required to succeed;
- the experience and background a candidate needs to do the job effectively: familiarity with the sector, job knowledge, education, professional certification; and
- work style, personality traits and attitudes that can impact an individual’s ability to thrive in the organization.

Devise a consistent job architecture

By clearly differentiating responsibilities, organizations can strengthen talent management and career development. Consistent position titles that clarify reporting levels and responsibilities facilitate both recruiting and career pathing. Clear titles enable candidates to understand the scope of a position they are applying for as well as the reporting structure. They also provide a framework that enables employees to better understand their unique career paths and advancement opportunities.

Offer creative compensation packages

Base pay is just one component of an appealing compensation package.

Many top performers are looking for opportunities to work for organizations that respect and nurture relationships with their employees. Consider ways your organization can do this by supporting the personal and professional growth of development staff and helping them achieve a healthy work-life balance.

Benefits such as flex-time, telecommuting, schedule flexibility, mentorship, training and certification support, performance bonuses and recognition enhance your organization's appeal. When discussing compensation with prospective candidates, be sure to present these benefits as key components of the total package.

Verify that your compensation is competitive

Develop a strong benchmark for appropriate compensation by completing a customized survey of salary and benefits with similar organizations every three years. Update this annually by benchmarking against current published databases for the sector.

Leverage technology and data-driven recruitment tools

New technologies provide valuable automation tools, data and metrics that enable foundations and charities to continually streamline and improve the recruiting process and to make more informed decisions.

Larger organizations in particular can make use of artificial intelligence for sourcing and resume screening; software for candidate geo-targeting; tech-enabled automation to attract, engage and nurture candidates who haven't yet applied for a position, and much more.

To access these tools, tap into the expertise and support of your human resources department or an external recruiting firm. If you believe your HR team doesn't sufficiently understand how fundraising works, take the opportunity to educate them about the roles, skills and contributions of development staff and appropriate techniques for hiring them.

"Have a lunch or dinner meeting with the final two or three candidates to see how they will perform in social situations with donors."

Senior manager, national charity

Structure interviews to ensure candidate fit with position and organization

Along with traditional techniques in which an interviewer evaluates a candidate's education, job experience, professional achievements and technical experience, using a combination of the following interview techniques and tools provides a more thorough assessment. This requires first identifying the skills or competencies necessary for a particular position and then developing appropriate questions and tests to determine whether candidates actually possess those qualities.

- Past problem resolution – predicts future performance by probing how candidates resolved certain issues they previously encountered
- Hypothetical situation – based on challenging, real-life occurrences where candidates describe the steps they would take to solve issues
- Presentation delivery – assesses candidates' abilities related to timing, persuasion, speaking in public and creativity
- Panel interview – minimizes biases and provides candidates with an opportunity to better understand the job and interaction among potential co-workers
- Homework assignment – related to a project candidates will have to undertake if hired; assesses analytical skills and problem-solving abilities
- Writing test – assesses comprehension and written communication skills
- Psychometric personality testing – provides an objective and comprehensive understanding of personality and abilities and assesses candidate fit with an organization's culture and work style

Like all employees, millennials expect purpose and engagement

While there's a lot of discussion about attracting and keeping millennials, the basics are the same for any type of employee: they want a sense of purpose and they want to feel engaged. It's all about valuing and building relationships with them.

For example, adapting organizational structure and culture to shared leadership contributes to greater engagement while also supporting skills development and retention. Holding individuals accountable for impact enables them to more readily find a sense of purpose in the mission.

Offer a pay-for-performance plan

Whereas base pay provides compensation for achievement of agreed targets, a pay-for-performance plan rewards high performance. Non-profits sometimes use these plans as incentives to direct employees to focus their efforts on specific organizational goals. You can integrate adjustments based on individual performance and also offer team incentives. Plans that include a sliding scale can reward superstar performers with a higher bonus.

Hiring from outside the sector? Help these individuals succeed

When reaching beyond the non-profit sector for individuals with transferable skills such as sales, marketing and communications, foundations and charities need to provide new hires with training and PD to fill in knowledge and skills gaps.

Success in the world of philanthropy demands not only passion for the cause but also exceptional skills in team building, consensus building, empathy and inclusiveness. It's also essential to have a good understanding of governance in the non-profit sector.

This is especially important for out-of-sector leaders coming into senior positions where the risk of failure is higher. It can be helpful to design a role specifically for these individuals so they can learn and work their way up the organization.

3. AMPLIFY ENGAGEMENT AND RETENTION

Many organizational leaders struggle with retention of their fundraisers. A majority of the research participants indicated that turnover in their organizations is at or above the historical average annual turnover rate of about 20% in the non-profit sector. The growing number of baby boomers heading into retirement is exacerbating this problem at senior levels.

Limited budgets, restrictions on incentives and weak commitment to performance management and PD can also contribute to the loss of high performers. Since fundraising is relationship based, this can be problematic when important donor relationships walk out the door with departing development staff.

Successful charities and foundations emphasize employee engagement and retention because these support donor satisfaction, a productive workforce, a healthy culture and effective succession planning. Following are some ways to accomplish this.

Onboarding is critical

Pave the way to a successful relationship and quickly transform new hires into highly productive performers by carefully planning their onboarding – the process of integrating them into the organization. The way an individual assimilates can make the difference between a satisfied fundraiser and one who immediately begins planning a fast exit.

This process should be designed to rapidly build engagement by integrating employees into the work, life and culture of the organization.

“There is an absolute need to ensure honesty and openness throughout the recruitment process.”

CEO, mid-size hospital foundation

Shape an effective onboarding program with these questions

What challenges are we having with our recruiting and retention? How can onboarding help us resolve these challenges?

Who should be involved in onboarding and how should they be involved?

How will we welcome new hires; what needs to happen and when, to ensure they feel comfortable in our work environment?

How should we set goals for the new hire?

How will we measure success?

Provide personalized growth and development opportunities

Job requirements and responsibilities change rapidly in tandem with marketplace demands and community needs. Top performers want to be able to continually learn and develop new skills.

Since career pathing is a key reason fundraisers leave one organization for another, employers need to offer learning opportunities targeted to the needs and aspirations of the individual. There are a range of options that are also cost-effective for limited budgets. Training, mentoring, coaching, continuing education, professional certification, leadership experiences, talent swaps, secondments, job shadowing or sharing, are all perceived by fundraisers as valuable benefits.

“Cost per dollar raised is important to boards but directors need to understand that to achieve the levels they want, they have to invest in the people who do the work.”

CEO, large hospital foundation

“Once good people are on board, ensure employee engagement is a top priority and be aware of potential burnout.”

**Development director,
regional charity**

“Create a formal retention strategy, implement it and stick with it.”

Senior manager, large hospital foundation

Support career growth aspirations through lateral movement

Especially among small and mid-size philanthropic organizations with flat hierarchical structures, the “climb the ladder” career path may not be an option. Lateral moves into different positions can enhance employee skills, satisfaction and retention.

Support development of managerial skills

Good managers are essential for retention. Whereas leaders with excellent management skills enhance morale, empower employees and reduce turnover, poor managers can do the opposite.

Research participants cautioned about the need to avoid micromanaging and the importance of a management style focused on engagement and coaching.

Prior to moving individuals into management positions, organizational leaders need to provide appropriate training and experience so they can be effective. Managers need capabilities in leadership, critical thinking, communication, collaboration and project management.

Psychometric assessments are helpful for testing leadership capabilities and providing a roadmap to develop leadership skills, abilities and confidence. They can also serve as a warning sign if an individual lacks managerial potential.

“I would appreciate some type of sector roundtable to discuss – formally, regularly – the issues that cause [high turnover.] One of our professional organizations could help with this.”

**ED, Advancement,
large hospital foundation**

“The most talented people we have need to be engaged and encouraged to grow – or they will leave.”

CEO, small hospital foundation

Address toxic turnover

Turnover can be good. Turnover can be bad.

Anecdotally, it seems the average period of time an individual stays in an entry-level fundraising position is generally 18 months to two years. This rate has not changed significantly in decades.

Many fundraisers feel they need to make a move to another organization to earn more money or to advance their careers. But it's important to determine whether your organization is experiencing desirable or undesirable staff turnover.

Undesirable turnover caused by toxic organizational culture comes with high costs. By comparison, desirable turnover due to the natural cycle of employees' careers can enhance an organization's reputation and strengthen performance.

Exit interviews and workplace assessments are effective ways to determine whether turnover is caused by positive or negative influences and to enable the leadership team to act on problems.

- Exit interviews/surveys - provide insights into what is and isn't working well in the organization. Structured surveys that reflect best practices shed light on areas requiring attention to improve engagement and retention reduce turnover.
- Workplace assessments - are designed to identify issues or perceptions that inhibit an organization's ability to attract and/or retain a diverse workforce at all levels. These surveys are helpful for gauging employees' attitudes and perceptions and determining the nature and extent of workplace issues.

"When I've interviewed a real "gem" that I can't hire for whatever reason, I'd like to be able to recommend them to someone else in the sector. We should be more cooperative in this respect"

**Development director,
mid-size hospital foundation**

"Take the time to meet weekly with each staff member about their personal challenges"

CEO, mid-size hospital foundation

Create frequent touch points

Fundraisers, especially young employees, are ambitious, enthusiastic and goal oriented and want to see progressive growth. Their managers need to check in with them regularly to ask about their needs, wants, frustrations and career path progress. It's important that managers have appropriate communication training so they can facilitate productive career-focused conversations with their direct reports. Proactive interviews let your valued performers know they are important to the organization. The annual review is an important opportunity for a collaborative discussion regarding an individual's aspirations related to their personal development and career. Supplementing this with a mid-year discussion can make the process even more timely and effective. The following touch points can also strengthen engagement.

- Performance check-ins – Ignoring underperformance can be damaging for employees as well as the organization they work for. Better to review performance frequently and immediately address issues so they don't escalate. Schedule performance check-ins at least quarterly. Monthly is even better. If issues arise, consider opportunities for training, mentoring, coaching, goal realignment, or transitioning to another position.
- Stay interviews – By conducting these structured discussions with an employee every six months, their manager can learn what is needed to strengthen the individual's engagement and retention with the organization. Questions should focus around what the fundraiser most enjoys about their work; what keeps them with the organization; if they have considered leaving and why; what they are learning; what they want to learn; and how the organization can make their work experience better.
- Regular interaction with senior leaders – The leadership team is a key driver of employee satisfaction so it's important to provide regular opportunities for employees at all levels to engage directly with organizational leaders. Face-to-face meetings or forums, webinars, and/or conference calls scheduled several times a year reinforce the importance of each person's role in achieving the organization's mission.

Conduct annual 360 reviews for every staff member

These professional feedback opportunities focus on how people work together. By gathering input from everyone with whom an individual works, management can take specific actions to improve performance and mitigate serious issues.

***"We work in a world of gratitude.
It's important to find the time to say
thanks and recognize a job well done."***

Executive, mid-size hospital foundation

Plan for succession

While many leaders of hospital foundations and health care charities talk about succession planning, too few have a plan in place. Given the growing number of retiring baby boomers, the need is urgent.

A succession plan, endorsed by the board of directors, helps to establish confidence in an organization's future and trust in decision-making. This plan communicates opportunities to internal staff about possible career paths and gives leadership the opportunity to groom staff to develop a high-performing work force and build a pool of prospective future leaders. In this way, a succession plan also supports retention as well as knowledge transfer.

Psychometric testing can help to identify those with the key competencies needed for success. It can also contribute to establishing development plans for individuals in the succession pipeline.

Moreover, planned succession is a key factor in successful recruiting. The better you are at planning the future of your organization and developing your employees, the easier it is to target your recruitment efforts, find good fits, and retain top talent.

How to make succession planning happen

Integrate succession planning into the strategic planning process. Make it a shared executive/board responsibility and incorporate it as a direct accountability in the ED/CEO's contract.

Review and update the succession plan annually as part of the performance review process, as well as when competency improves or there are new candidates for succession.



“Enabling people to excel is a key pillar in our strategic plan.”

Vice-president, large foundation

A Place to Start

The research undertaken by CrawfordConnect clearly points out the recruiting challenges of hospital foundations and health care charities in Canada's marketplace of growing demand for fundraisers and shrinking resources.

The path ahead is also clear. To find, attract and retain the passionate, high-performing – but scarce – fundraisers who sustain your organizations, leaders must embrace new approaches. The insights and ideas presented in *Rising to the Challenges* offer a way forward.

New strategies are essential to meet the high expectations of today's in-demand fundraisers, to attract top-choice candidates to your organization and to keep them engaged and productive.

While every organization has different needs, priorities and capabilities, *Rising to the Challenges* presents more than 30 solutions. Ideas to cultivate a true philanthropic culture. Suggestions to diversify recruiting strategies. Ways to amplify engagement and retention. We hope you use those that are practical for your own organization to invigorate your recruitment and retention.

Perhaps the most important takeaway is that attracting and retaining the fundraisers who are essential to your missions is not simply an operational task; it is a strategic imperative. Use your strategic planning process as an opportunity to monitor your talent pipeline, update your demand forecast, and implement strategies to ensure your organization has the necessary people in place.

If you require assistance, please seek it. Affordable tools and resources are available to help you successfully engage the talented fundraisers you need for today and tomorrow.

One final takeaway from this informative research: Canadian leaders in this sector crave more information sharing and collaboration.

Now is the perfect time to continue the discussion about the issues and ideas raised in this white paper.

How do we build trust in the workplace?

While recognizing the need for renewal, how can employers commit to the growth and engagement of fundraisers for the long-term?

How can we affirm front-line fundraising as a valid path for someone's entire career? Can we change compensation structures to retain fundraisers who focus on work with donors rather than seeking management positions?

Now is the time to establish a new collaboration platform. A channel where leaders in health care philanthropy can share experiences, ask questions and find answers. A forum to drive successful change and achieve your common goal: leveraging the talents of great fundraisers to fulfill your mission.

Now is the time. Let's start the conversation about how to make this happen.

Deborah

APPENDIX: QUICK READ, QUICK PRINT

HIGHLIGHTS OF RESEARCH AND SOLUTIONS

Why do we have such a tough time finding good fundraisers?

Why is turnover so high?

What are organizations in our sector doing to recruit and retain top talent?

Over the past decade working exclusively in recruiting for the non-profit sector, we've been hearing questions like these more and more frequently – especially among leaders in the field of health care philanthropy.

Given the importance of this sector to Canada's health care system, crawfordconnect wanted to learn more about the specific recruiting challenges these organizations are experiencing, as well as their successes – with a view to gaining insights and offering solutions that are, importantly, practical.

We initiated groundbreaking research: purely Canadian research about recruiting the fundraisers who enable Canada's health care charitable sector to achieve their missions. On our behalf, the Beslin Communication Group conducted in-depth confidential interviews with leaders of hospital foundations and health care charities across the country to gather extensive input.

The results are revelatory. The first of its kind in Canada, this white paper presents an in-depth view of the concerns and struggles of the leaders in this sector in seeking essential development staff. It also provides a path to success.

RESEARCH METHODOLOGY

The data in this white paper are based on compilation and clustering of responses collected in telephone interviews with 80 participants – CEOs, Executive Directors and senior managers in fundraising health care organizations and influencers in the field of health care philanthropy from across Canada conducted between December 2018 and April 2019.

CURRENT RECRUITING PRACTICES: TRADITIONAL TACTICS, LITTLE INNOVATION

So how do hospital foundations and health care charities go about recruiting and selecting the fundraisers they need?

In general, they appear to stick with tried-and-true traditional practices that follow a standardized, conventional process of about eight steps – from posting job descriptions, to screening potential candidates by phone, to conducting two rounds of panel interviews.

Only a minority of organizations follow a process that's customized to the position for which they are recruiting or to the organization's needs and priorities.

THE BIG CHALLENGES

1. RECRUITING GOOD FUNDRAISING PEOPLE IS A TOP PRIORITY, AND A KEY CONCERN

While senior people juggle many pressing demands, recruiting talent is among their top priorities. They understand that effective recruitment helps to develop a pipeline of future leaders. For most interviewees, talent recruitment is an organizational priority included in the strategic and/or operations plan.

It's really, really hard to find proficient development staff

There simply aren't enough qualified fundraisers to meet the need. More than half of interviewees believe that recruiting good people is primarily an issue of supply and demand, depending on market conditions.

Among the minority who disagree, they believe recruiting the right people also depends on an organization's reputation or brand along with the ability to effectively access personal networks and innovative sources such as donor organizations and non-traditional sectors.

COMMON ISSUES

Any organization is only as effective as its people, so it's essential that hospital foundations and health care charities are staffed for success. But this is a tough task in the face of additional recruiting issues they encounter.

- **Lots of competitors for talent, little budget for recruiting and retention**

The corporate sector is considered to be a competitor for talent, along with community services and long-term care organizations. But lack of funding hinders talent recruitment priorities.

- **Low use of technology and data analytics**

Only a minority of interviewees use specialized recruitment technology or software, including those for question-building, personality assessment, behaviour prediction and profiling for cultural fit. Few use data analytics to benchmark and predict talent needs, and to establish realistic expectations for candidates about how they will integrate into an organization's plans.

- **Millennials are tough to recruit, and very hard to keep, in demanding work environments**

It can be difficult meeting the high expectations of Gen Z and millennials for advancement and more challenging projects. And the reality of demanding, fast-paced work environments and ambitious fundraising targets often leads to burnout and rapid turnover. Over half of interviewees indicated "our work environment needs to improve to attract the best talent."

2. RETENTION ISSUES GO HAND-IN-HAND WITH RECRUITING

Interviewees said it is important to put as much or even more emphasis on retention as well as recruiting. Many lament the “revolving door” of skilled staff.

Trying to retain with a variety of incentives

More than half of research participants provide incentives to help retain fundraisers. Professional development, education and training are the most common, although low budgets limit the ability to provide robust incentives.

Flex-time is a coveted incentive, with people seeking work-life balance and the ability to attend to personal matters. For hospital foundations, generous pension and benefits plans represent inducements for both recruitment and retention.

Limited opportunities for career progression

Despite incentives, turnover is problematic. Providing opportunities for career advancement and growth is a major factor in keeping skilled, ambitious employees.

- **Little money for PD:** Most interviewees said their organizations don’t have budgets for formal retention strategies or professional development programs and few have performance management or personal improvement plans.
- **Lack size, structure or scale:** As well, most don’t have the organizational size or structure to accommodate movement up the hierarchy; people often leave because they outgrow the organization.
- **Disconnect between expectations and experience:** In other cases, departures are a result of misalignment between the expectations of a new role and the actual experience.
- **Confusing position titles:** Inconsistent and confusing titles for fundraisers are another obstacle. Boards and even senior management are not always clear on roles and how individuals fit into the organization. This can hamper integration and engagement in the organization, as well as appropriate personal career pathing.

Missing strong leadership support

How leaders manage the organization, deal with accountability, the work environment they create, the culture they foster – these are often issues that can contribute to turnover of fundraising staff. Moreover, boards of directors can have idealistic fundraising expectations, exerting pressure to get money in the door quickly.

Plus, a mix of these factors

Among the other factors contributing to high turnover are: low salaries, poor benefits, heavy workload with long hours, maternity leave, geographic location, and a mindset focused on compensation versus the cost-to-raise-a-dollar ratio that is common in the sector, particularly among board members.

OVERCOMING THE TOP OBSTACLES TO HIRING TOP TALENT

To improve results and land candidates who will excel in your organization, the recruiting process needs to change. But what changes work best?

crawfordconnect combined our team's experience with suggestions provided by research participants - and present the following ideas and recommendations to enhance the recruiting success of Canada's vital fundraising health care organizations.

1. CULTIVATE A TRUE PHILANTHROPIC CULTURE

The work environment needs to improve to attract and keep great fundraisers. Often, problems can be traced to the fact that the board and management do not sufficiently embrace and model a culture of philanthropy.

Harmonize experience of new hires with their expectations

Ensure the entire team is aligned with the organizational culture and those responsible for hiring are honest and clear about this culture as well as the work environment and the expectations of the board and management.

Build and promote a strong employer brand to attract better candidates and strengthen the organization's ability to make a quality hire.

Provide supportive leadership

Senior leaders should establish strategic priorities and policies that reinforce a healthy culture and support employee work-life balance - and lead by example.

Board members and senior executives should provide strong leadership to fund development and participate in the process. They must promote a culture of philanthropy and serve as ambassadors for that culture inside and outside the organization. Training might be needed to reinforce this mindset.

2. DIVERSIFY RECRUITING STRATEGIES

There are many more organizations that need to hire great fundraisers than there are great fundraisers. By establishing a diversified recruiting strategy, hiring managers can avoid an all-of-your-eggs-in-one-basket predicament.

Increase the supply of qualified candidates

Ways to build the candidate pipeline include: create a list of potential fundraising candidates for the future; set up an employee referral program; request referrals from your community of volunteers and donors; look to past candidates, former employees and interns; use social media strategically to engage people inside and beyond the fundraising field; search for candidates in non-traditional sectors; hire students and tap into grants.

Develop clear, complete position profiles

Well-defined job requirements and competencies enable you to develop appropriate interview techniques to determine if someone can actually do the job you want done.

Devise a consistent job architecture

Clear reporting levels and responsibilities provide a framework for candidates to understand the scope of the position they are applying for, the reporting structure, career path and advancement opportunities.

Offer creative compensation packages

Benefits such as flex-time, telecommuting, schedule flexibility, mentorship, training and certification support, performance bonuses and recognition enhance an organization's appeal. Present these benefits as key components of the total package when discussing compensation with prospective candidates.

Leverage technology and data-driven recruitment tools

New technologies provide valuable automation tools, data and metrics that enable foundations and charities to continually streamline and improve the recruiting process and to make more informed decisions.

Structure interviews to ensure candidate fit with position and organization

Identify the skills or competencies necessary for a particular position and then develop appropriate questions and tests to determine whether candidates actually possess those qualities. A combination of interview techniques and tools provides a more thorough assessment: past problem resolution, hypothetical situation, presentation delivery, panel interview, homework assignment, writing test, psychometric personality testing.

Like all employees, millennials expect purpose and engagement

It's all about valuing and building relationships with them. For example, adapting organizational structure and culture to shared leadership contributes to greater engagement, skills development and retention. Holding individuals accountable for impact enables them to more readily find a sense of purpose in the mission.

Hiring from outside the sector? Help these individuals succeed

When reaching beyond the non-profit sector for individuals with transferable expertise, provide new hires with training and professional development to fill knowledge and skills gaps. For out-of-sector leaders coming into senior positions, consider designing a role specifically for these individuals so they can learn and work their way up the organization.

3. AMPLIFY ENGAGEMENT AND RETENTION

Many organizations struggle with retention of their fundraisers. Since fundraising is relationship based, this can be problematic when important donor relationships walk out the door with departing development staff.

Successful charities and foundations emphasize employee engagement and retention because these support donor satisfaction, a productive workforce, a healthy culture and effective succession planning. Following are some ways to accomplish this.

Onboarding is critical

Pave the way to a successful relationship and quickly transform new hires into highly productive performers by carefully planning their onboarding. This process of integrating individuals into the work, life and culture of an organization should be designed to rapidly build engagement.

Provide personalized growth and development opportunities

Employers need to offer learning opportunities targeted to the needs and aspirations of the individual. Training, mentoring, coaching, continuing education, professional certification, leadership experiences, talent swaps, secondments, job shadowing or sharing, are all perceived by fundraisers as valuable benefits.

Among small and mid-size organizations with flat hierarchical structures, lateral moves into different positions can enhance employee skills, satisfaction and retention.

Support development of managerial skills

Good managers are essential for retention. Prior to moving individuals into management positions, organizational leaders need to provide appropriate training and experience so they can be effective. Managers need capabilities in leadership, critical thinking, communication, collaboration and project management.

Psychometric assessments are helpful for testing leadership capabilities and providing a roadmap to develop leadership skills, abilities and confidence. They can also serve as a warning sign if an individual lacks managerial potential.

Address toxic turnover

Exit interviews and workplace assessments are effective ways to determine whether turnover is caused by positive or negative influences and to enable the leadership team to act on problems. Consider conducting annual 360 reviews to gather input from everyone with whom an individual works.

Create frequent touch points

Proactive interviews let valued performers know they are important to the organization. The annual review is an important opportunity for a collaborative discussion regarding an individual's aspirations related to their personal development and career. Supplementing this with a mid-year discussion can make the process even more timely and effective.

Managers can also schedule performance check-ins and stay interviews. The latter are structured discussions to determine what is needed to strengthen an individual's engagement and retention. It's also important to provide regular opportunities to engage directly with organizational leaders: face-to-face meetings or forums, webinars, and/or conference calls.

Plan for succession

The better organizational leaders are at planning the future of an organization and developing employees, the easier it is to target recruitment efforts, find good fits, and retain top talent. To make succession planning happen, integrate it into the strategic planning process. Make it a shared executive/board responsibility and incorporate it as a direct accountability in the ED/CEO's contract.

A PLACE TO START

The research undertaken by CrawfordConnect clearly points out the recruiting challenges of hospital foundations and health care charities in Canada's marketplace of growing demand for fundraisers and shrinking resources.

The path ahead is also clear. To find, attract and retain the passionate, high-performing – but scarce – fundraisers who sustain your organizations, leaders must embrace new approaches. The insights and ideas presented in *Rising to the Challenges* offer a way forward.

The most important takeaway: attracting and retaining the fundraisers who are essential to your missions is not simply an operational task; it is a strategic imperative.

Use your strategic planning process as an opportunity to monitor your talent pipeline, update your demand forecast, and implement strategies to ensure your organization has the necessary people in place.

And one final takeaway: Canadian leaders in this sector crave more information sharing and collaboration. Now is the perfect time to continue the discussion about the issues and ideas raised in this white paper.

Now is the time to establish a new collaboration platform – a channel where leaders in health care philanthropy can share experiences, ask questions and find answers. A forum to drive successful change and achieve your common goal: leveraging the talents of great fundraisers to fulfill your mission.

Let's start the conversation about how to make this happen.

Deborah Legrove

For complete details, examples, quotes and statistics related to the research and solutions highlighted in this summary, please refer to the full white paper, *Rising to the Challenges*.

About crawfordconnect

The right people in the right roles propel successful non-profits.

Since 1996 crawfordconnect has successfully recruited the capable leaders, managers and fundraisers that enable Canada's non-profits and charities to advance their missions.

With decades of non-profit management and executive search experience, our team of specialists has helped hundreds of charities, foundations, and non-profits in the fields of health, education, culture and social services build effective leadership teams.

To enhance alignment and performance of these leaders and their organizations, crawfordconnect also provides support related to compensation, engagement and integration, leadership development, performance management, retention and succession planning.

The right people in the right roles paves the path to success.



recruiting excellence for the non-profit sector

crawfordconnect.com

866 647 5149

info@crawfordconnect.com